

## **Chile Third-party Logistics (3PL) - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

Market Report | 2025-04-28 | 150 pages | Mordor Intelligence

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### **Report description:**

The Chile Third-party Logistics Market size is estimated at USD 4.53 billion in 2025, and is expected to reach USD 6.03 billion by 2030, at a CAGR of 5.89% during the forecast period (2025-2030).

#### **Key Highlights**

- The Chilean third-party logistics (3PL) sector has witnessed robust growth, driven by businesses increasingly outsourcing for transportation, warehousing, and freight forwarding functions. This trend is particularly pronounced as Chile's e-commerce landscape expands, necessitating 3PL providers to manage last-mile deliveries and online retailers' inventories.
- Industry data reveals that in 2022, 64.8% of Chileans made online purchases, a figure projected to rise annually, hitting 69.4% by 2027, buoyed by the country's high 91% internet penetration. The primary e-commerce demographic in Chile falls between 26 and 40 years old (33%), closely followed by the 41-55 age group (29%). About 36% of buyers boast high household incomes, splitting the remaining almost evenly between low and middle-income brackets. The top categories for online purchases in Chile include clothing (50%), shoes (41%), food and beverages (30%), cosmetics (26%), and consumer electronics (25%).
- 3PL providers in Chile increasingly turn to technology, such as tracking systems, warehouse management software, and analytics, to boost operational efficiency and elevate customer service standards. For instance, warehouse automation streamlines operations enhances speed, and increases productivity by reducing human interventions.
- Technologies like automated guided vehicles (AGVs), robotic picking, automated storage and retrieval systems (ASRS), and put-wall picking, all falling under the umbrella of pick-and-place technologies, not only slash error rates but also significantly amplify warehouse productivity. To rein in operational logistics costs, Chile warehouses recognize the necessity of a well-thought-out integration of these efficient automation technologies. In a recent development, in April 2024, US-based GXO Logistics partnered with AR Racking, a prominent industrial racking specialist, in response to escalating demands to expand the storage capacity of one of its Chilean warehouses.

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- The Chilean 3PL sector is ripe with opportunities for providers to introduce innovative solutions, enhancing supply chain efficiency and catering to the evolving needs of businesses in this burgeoning economy.

## 3PL in Chile Market Trends

### Infrastructure Development Projects Underway? Supporting the Chile 3PL Sector

- Chile is gearing up for a substantial infrastructure push, with tenders valued at approximately USD 2.3 billion in 2023. The Ministry of Public Works (MOP), renowned for its meticulous planning and transparent bidding, fosters a collaborative environment between government bodies and private enterprises.
- Chile's unveiling of its 2024 bidding plan, featuring a staggering 680 projects, underscores its unwavering commitment to driving economic growth through strategic infrastructure investments. These projects span various sectors, from airport and architectural advancements to hydraulic engineering, port expansions, and rural healthcare facilities.
- Over the next 18 months, the Chilean government plans to roll out tenders for 11 infrastructure projects, collectively valued at USD 7.5 billion. Luis Felipe Elton Sanfuentes, head of project development and tenders at the MOP, revealed this ambitious portfolio at the PPP Americas forum in Panama City.
- These projects include crucial segments of the Pan-American highway, like Santiago-Los Vilos, Temuco-Rio Bueno, and Iquique-Antofagasta, among others. Additionally, projects like the Valdivia access road and the Pie del Monte highway are on the agenda.
- Chile's new road expansion initiative is poised to enhance freight transport by bolstering connectivity and slashing travel times. The maritime sector, especially at the Port of San Antonio, is set to witness a surge in demand for freight transport, buoyed by concurrent road infrastructure enhancements.

### Chile's Trade Expansion Drives Growth in the 3PL Market

- In its pursuit of bolstering international trade, Chile has not only deepened ties with various nations but also broadened its export horizons. This strategic push has significantly upped the ante for efficient logistics services, benefiting the 3PL sector.
- As Chile's trade landscape expands, so does the volume of goods crossing its borders. In 2023 alone, Chile witnessed imports valued at USD 80.49 billion and exports totaling USD 100.29 billion. With this surge in trade, the demand for robust logistics and supply chain services has soared, presenting 3PL providers with a ripe opportunity to offer tailored solutions.
- Chile's proactive stance in forging trade pacts has not gone unnoticed. These agreements have not only birthed new trade avenues but have also ramped up cross-border activities. Chile's trade diplomacy shines through its 26 negotiated agreements, now operational in 25 instances. These pacts span a vast landscape, covering 65 markets and representing 88% of the global GDP.
- These agreements are diverse, including 17 FTAs with nations like the United States, Canada, Mexico, Korea, and many others, alongside three Economic Association Agreements with entities such as the European Union and Japan.
- Further solidifying its trade network, Chile has inked six Economic Cooperation Agreements, notably with Bolivia and Peru, and holds a Partial Association Agreement with India, complemented by a Commercial Protocol within the Pacific Alliance. These strategic moves have smoothed the flow of goods across borders and positioned 3PL providers to capitalize on this robust infrastructure, tailoring services to meet evolving business demands.

## 3PL in Chile Industry Overview

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The Chilean third-party logistics (3PL) market is competitive and fragmented. The market has grown robustly, buoyed by the nation's strategic positioning, economic stability, and business-friendly climate. This allure has enticed international logistics giants and fostered a competitive landscape, with global and local players vying for dominance and pushing the boundaries of service innovation.

Standing out in this competitive arena is DHL, a global powerhouse. Leveraging its expansive network, DHL has cemented its position as a premier logistics provider in Chile, offering diverse services from warehousing to transportation tailored for sectors like retail, automotive, and healthcare.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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