

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

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Report description:

The Colombia Third-party Logistics Market size is estimated at USD 4.09 billion in 2025, and is expected to reach USD 5.96 billion by 2030, at a CAGR of 7.85% during the forecast period (2025-2030).

Key Highlights

- Colombia's strategic location and bolstering international trade activities fuel robust market growth. As a leading economy in Latin America, Colombia actively forges trade agreements, solidifying its status as a regional logistics hub.
- For instance, in October 2024, Emergent Cold Latin America (Emergent Cold LatAm), one of the leading providers of temperature-controlled food storage and logistics solutions in Latin America, unveiled plans to bolster its storage infrastructure in Colombia. Two upcoming projects will introduce an additional 22,000 pallet positions to the company's capacity in the nation, significantly impacting the Third-Party Logistics (3PL) market in Colombia.
- This surge underscores the escalating demand for adept logistics solutions across diverse sectors. As supply chains grow more intricate, businesses increasingly turn to 3PL providers for specialized services and operational optimization.
- Transportation services are set to lead the 3PL market. This segment thrives on the heightened demand for efficient freight movement in Colombia, with air cargo and ocean shipping witnessing marked growth. From 2023 to 2024, transportation management revenue edged up from USD 1.98 billion to USD 2.01 billion, while international transport management held steady at USD 1.54 billion. Such emphasis on transportation efficiency is vital for businesses aiming to retain their competitive edge.
- Meanwhile, the warehousing and distribution segment anticipates an uptick in demand for advanced solutions. This surge stems from the growing need for adept inventory management and last-mile delivery as companies broaden their reach. Many are enlisting 3PL providers to refine storage and distribution, ensuring prompt customer deliveries. Industry Association data highlights the value-added warehousing and distribution rising from USD 0.93 billion in 2022 to USD 0.95 billion in 2024.
- Colombia's active participation in international trade agreements, notably the free trade pact with the United States, has spurred

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trade volumes. Reports indicate that in 2024, international trade constituted 40.5% of Colombia's GDP, propelling the market forward.

Third Party Logistics (3PL) in Colombia Market Trends

Colombia's 3PL Market Thrives Amid International Transport Management Advancements

In 2024, Colombia's third-party logistics (3PL) market is witnessing significant growth, largely driven by advancements in international transport management. These advancements stem from strategic trade agreements and substantial infrastructure investments. Prioritizing the enhancement of transportation and warehousing infrastructure, the Colombian government is paving the way for the 3PL market's expansion. For instance, in February 2024, Loadstar highlighted that DP World-owned Unifeeder is initiating a reefer-focused service between Colombia and Panama. This move not only boosts logistics efficiency in Latin America but also strengthens its global market ties, benefiting the 3PL sector in Colombia.

Colombia's strategic trade agreements play a crucial role in fortifying its 3PL market. Through multiple free trade agreements (FTAs), Colombia has broadened its access to global markets, establishing itself as a key logistics hub. These FTAs not only reduce tariffs but also simplify customs processes, enhancing the country's appeal for foreign logistics investments, directly benefiting the 3PL market. A significant highlight is Latham & Watkins' recent arbitration victory for Colombia. Reported in March 2024, the case, settled at the World Bank's International Centre for Settlement of Investment Disputes, involved Red Eagle Exploration Limited, a Canadian mining firm. The arbitration team adeptly countered a USD 130 million claim under the Canada-Colombia Free Trade Agreement (FTA), reinforcing Colombia's allure for 3PL investments.

Furthermore, as Colombian manufacturers increasingly prioritize effective supply chain management, their reliance on 3PL providers intensifies. By outsourcing logistics, manufacturers can focus on core activities, benefiting from the expertise of specialized logistics firms. Reports from the Industry Association in September 2024 reveal that Colombia transported a total freight of 25.08 billion ton kilometers, highlighting the pivotal role of 3PL providers in the nation's logistics landscape.

In summary, Colombia's 3PL market growth in 2024 is fueled by strategic infrastructure investments, advantageous trade agreements, and manufacturers' growing dependence on specialized logistics services. Together, these elements bolster the efficiency and global connectivity of Colombia's Third-Party Logistics sector.

eCommerce Driving the Growth of the Market

In 2024, the e-commerce sector is significantly propelling the expansion of Colombia's third-party logistics (3PL) market. With a growing number of consumers turning to online shopping, there's been a notable surge in demand for efficient logistics solutions. This trend has led businesses to increasingly collaborate with 3PL providers to adeptly manage their supply chains. This uptick in online retail activity underscores the escalating demand for 3PL logistics services, especially those adept at managing heightened order volumes and ensuring prompt deliveries.

As Colombia's e-commerce landscape flourishes, there's a marked uptick in dependence on 3PL providers for warehousing and distribution. Many enterprises are now outsourcing logistics to 3PL firms, allowing them to concentrate on core business functions while benefiting from the specialized expertise of 3PL providers. For example, Industry Associations report that in the initial four months of 2024, e-commerce constituted 2.1% of total retail sales. Notably, retailers and wholesalers have now surpassed last year's dominant players, the 3PL providers, in terms of occupancy, highlighting the shifting dynamics within the 3PL market.

Additionally, the burgeoning mobile commerce (m-commerce) trend in Colombia amplifies the demand for 3PL services. With a

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notable chunk of consumers shopping via smartphones, businesses find themselves under pressure to bolster their logistics capabilities, ensuring swift and dependable deliveries through 3PL providers. In Q2 2024, e-commerce sales in Colombia reached a notable 21.03 trillion Colombian pesos (0.0047 trillion USD), with online transactions tallying up to 98.4 million. Consequently, 3PL providers are evolving their services to tackle the distinct challenges that m-commerce presents.

In conclusion, the rapid growth of e-commerce and m-commerce in Colombia is driving significant demand for 3PL services. Businesses are increasingly relying on 3PL providers to manage their logistics operations efficiently, ensuring they can meet the rising expectations of online consumers. This trend is set to continue, further solidifying the critical role of 3PL providers in Colombia's evolving market landscape.

Third Party Logistics (3PL) in Colombia Industry Overview

The market is characterized by intense competition and fragmentation, featuring both local and global players. Notable names include Kuehne + Nagel, Servientrega SA, Deutsche Post DHL, Blu Logistics Colombia SAS, and Icoltrans. A significant trend is the growing inclination towards outsourcing logistics services. While this trend shows promise for continued growth, it's essential to note that Colombia's logistics outsourcing rates lag behind those of Europe and North America.

Consequently, industry leaders are diligently striving to optimize and streamline their processes. They are investing in advanced technologies, enhancing their service offerings, and forming strategic partnerships to improve efficiency and meet the rising demand for outsourced logistics solutions.

Additional Benefits:

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

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