

Latin America Supply Chain Consulting Services - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 133 pages | Mordor Intelligence

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Report description:

The Latin America Supply Chain Consulting Services Market is expected to register a CAGR of 3.31% during the forecast period.

Key Highlights

- Supply chain consulting services on imported products can assist companies in managing the movement of raw materials in their organization, the internal processing of materials into finished goods, and the direction of finished goods out of their organization and toward the end consumer. These services can also help organizations identify potential supply chain risks, such as supply chain disruptions, and develop strategies for addressing them. Additionally, supply chain consulting services can support navigating international trade regulations and compliance requirements related to importing products and optimizing the flow of materials, information, and capital for cost efficiency.
- According to UN Comtrade's data released in May 2023, toy imports in Latin America and the Caribbean were estimated to reach over USD 7.3 billion in 2022. Mexico was the largest toy importer in Latin America in 2022, with imports totaling over USD 3.26 billion. The Economic Commission for Latin America and the Caribbean (ECLAC) forecasted a 20% increase in the value of regional exports in 2022, driven by a 14% increase in prices and a 6% increase in exported volumes. Such a huge rise in imports and exports is expected to create growth opportunities for the market studied.
- Further, e-commerce relies heavily on supply chain management to efficiently and effectively deliver customer products. Supply chain consulting services in e-commerce include strategies for improving efficiency and reducing costs in logistics and fulfillment, inventory management, and order processing. Supply chain technology solutions and outsourcing services might also be recommended to optimize supply chain operations. Other typical applications related to electronic commerce include electronic funds transfer, internet marketing, and online transaction processing. It is important to note that strategies and solutions for e-commerce supply chain consulting are not one-size-fits-all and must be tailored to individual companies' unique needs and challenges.

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- Consulting pricing in Latin America is determined by various factors, including the type of consulting services required, the level of complexity of the project, and the experience and expertise of the consulting firm and its consultants. Other pricing factors may include the location and size of the client's organization, the urgency of the project, and the prevailing economic conditions in the country or region. Additionally, consulting rates may differ vastly between countries and regions in Latin America due to variations in the cost of living, market competition, and tax regulations. Discussing specific pricing factors with potential consulting firms is important to ensure a transparent and fair pricing structure.
- The COVID-19 pandemic has significantly impacted supply chains worldwide, including in Latin America. While the pandemic has caused disruptions and challenges in the short term, some experts predict that there may be long-term benefits for countries in Latin America as businesses look for alternative supply chain partners. According to some reports, Southeast Asia and Latin America are becoming key go-to places in the global supply chain as businesses shift away from China. Additionally, the rebound in the global economy following the pandemic has led to increased demand for commodities from Latin America, which could further boost the region's supply chain industry. However, persistent labor market challenges, lingering supply-chain challenges, and rising inflationary pressures continue to be concerns in the region.

Latin America Supply Chain Consulting Services Market Trends

SMEs Segment to Witness the Growth

- The small and medium-sized enterprise segment has a significant proportion of the total enterprise application integration market and is likely to maintain this trend during the forecast period. This is attributed to increased supply chain consulting by businesses seeking a competitive and strategic advantage over their competitors. Customers are using supply chain consulting to gather new information from diversified data. This service is appropriate for making supply chain-related decisions and getting insights over large amounts of data to discover significant connections, entities, and insights.
- Integration of Small and Medium-Sized Enterprises gives opportunities for major organizational growth. They may significantly improve team efficiency and expand their reach to scale their income by developing and automating the supply chain-related ecosystems.
- Small and Medium-Sized businesses utilize supply chain consulting such as in multiple aspects of the business, such as production planning, inventory management control, procurement planning, demand estimation, and warehouse design.
- Furthermore, SMEs and family-run companies play an essential role in the supply chains of the Latin America region, claiming the place for a predominant proportion of official employment and paying its noteworthy share to the GDP of the region. This boils down to 99.5% of the companies in the region, generating 60% of recognized industrious employment. Moreover, they amount to 75% of all companies valued at greater than USD 1 billion, which is around 60% of the region's total GDP (Gross Domestic Product). Moreover, according to the data released by the Government of Argentina, in 2022, the number of MSMEs in the country totaled 1,633,341.
- Given the indeterminate outlook in the region, the jeopardies in supply chains are bigger, and looking for ways to avoid negative effects actively, considering the characteristics of the region, becomes vital. This is why the demand for supply chain consulting has been growing for the small and medium-sized enterprises segment, which is anticipated to grow during the forecast period.

Brazil to Dominate the Supply Chain Consulting Services Market

- Brazil is expected to register significant growth during the forecast period and holds the major share of the market as well.
- Supply chain consulting services can involve anything from improving the efficiency of the supply chain process to ensuring that the organization has the right resources to meet customer demand and finding ways to reduce costs. The importance of Supply

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Chain Consulting has been proven effective for supply chain operations that are critical for any business competing in today's global economy. Many companies are constantly trying to reduce costs and increase efficiency to transfer the saved expenses to the customer and withstand the intense competition they face. This leads to increased demand for business process improvisations and consulting related to operational efficiency.

- Adopting IT solutions in logistics service is essential for the smooth and efficient flow of the entire supply chain. The IT solution adds economic value to the supply chain. IT solution plays a vital role in the timely delivery and tracing of goods in the supply chain. Thus, an increase in the adoption of IT solutions and software is anticipated to increase the efficiency and smoothen the flow of supply chain consulting services, providing a remarkable growth opportunity for the key players operating in the market.
- Due to the emergence of various large retailers such as Amazon, Brazil is expected to experience considerable improvement in supply chain operations. Irrespective of having a vast network of all modes of transportation, the transportation matrix in the country still needs to be balanced and requires modernization in several sectors. In line with this, the Government of Brazil has been implementing several initiatives to improve its transportation and logistics. This is likely to create immense opportunities for investment in the upcoming years in the country, ranging from the development of new enterprises to supply chain services. These initiatives are expected to promote the supply chain consultancy services market to grow in the country.
- Furthermore, in line with the growing demand for e-commerce, the market is expected to complement further growth of supply chain consultancy services in the country. In line with this, various companies have been investing in the country to strengthen their presence in the market.
- The region is also witnessing constant demand for digital transformation so that businesses can continue having the capacity and purpose to generate value for the respective markets. Such initiatives bring active mergers and acquisitions in the region. Such developments are analyzed to offer growth prospects to the region's supply chain consulting services market. In addition, the increasing demand for supply chain consulting services in various end-user industries for digital transformation will likely drive the market during the forecast period.

Latin America Supply Chain Consulting Services Industry Overview

The Latin America Supply Chain Consulting Services Market is moderately fragmented, with local and international players having decades of industry experience. The vendors are incorporating a powerful competitive strategy by leveraging their expertise and are also spending a large amount on advertising. Some of the prominent players in the market are Deloitte Touche Tohmatsu Limited, BCG/Boston Consulting Group, Bain & Company, etc.

- In April 2023, EY announced that it would be integrating the Latin American region, allowing it to promote growth and development plans that are anticipated to strengthen EY's position as the market leader among the Big 4 in the region. EY incorporates the skills and knowledge of more than 25,000 workers from Argentina, Bolivia, Brazil, Colombia, Costa Rica, Chile, Ecuador, El Salvador, Guatemala, Honduras, Mexico, and other regions in this new model.
- In October 2022, a share purchase agreement (SPA) was signed between Capgemini and Braincourt, a business intelligence and data science services provider in Germany and Northern Europe. Capgemini is looking forward to strengthening its in-demand data and analytics capabilities with this purchase.

Additional Benefits:

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

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