

## **Mexico Freight and Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

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### **Report description:**

The Mexico Freight and Logistics Market size is estimated at 124.4 billion USD in 2025, and is expected to reach 162.2 billion USD by 2030, growing at a CAGR of 5.45% during the forecast period (2025-2030).

Rising cross-border trade volumes along with market partnerships driving market demand

- In July 2024, UPS announced its acquisition of Estafeta, a prominent express delivery firm in Mexico, which includes a fleet of six aircraft. This move underscores Mexico's escalating strategic significance to UPS, particularly in light of the burgeoning trend of nearshoring. Estafeta provides global express services, facilitating the import and export of documents and parcels to a network spanning over 220 countries. Supported by a team of specialized freight forwarders, Estafeta operates a diverse fleet, prominently featuring six Boeing 737-400 freighters. While Estafeta's flights predominantly target locations within Mexico and Miami, interline agreements amplify its global connectivity.
- In January 2024, Mexico's SCT announced a USD 12.53 billion initiative to build and improve 8,115 km of roads, including 51 projects on key federal routes to reduce congestion and enhance safety. Also, USD 910 million will be allocated for 53 new rural roads. Moreover, in February 2024, Mexico's Michoacan state launched a USD 280 million project to convert a 72.3 km highway segment into a toll-free road linking the municipalities of Maravatio, Irimbo, Tuxpan, and Zitacuaro. The project, divided into three stages, is slated for completion by the end of 2026.

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## Mexico Freight and Logistics Market Trends

Mexico's transportation and storage sector growing with rise in volume of trade and future development projects

- From January to April 2024, Mexican seaports handled a record 2.95 million TEUs, an 18.2% increase YoY. The Pacific Coast ports managed most of this traffic, with a 19% increase to 2.14 million TEUs. Manzanillo and Lazaro Cardenas, the largest ports on the Pacific Coast, saw volume increases of 14.5% and 35%, respectively. This growth is expected to impact the sector's contribution to GDP positively. In August 2024, the Salina Cruz LNG JV revealed plans to build and operate a small-scale LNG bunkering and transshipment terminal in Salinas del Marquez, Salina Cruz, Oaxaca, Mexico.
- In February 2024, Amazon Web Services (AWS) announced plans to open an AWS infrastructure region in Mexico by early 2025. This new AWS Mexico (Central) Region will provide developers, startups, businesses, government, education, and nonprofits more options for running applications and serving users from data centers in Mexico, allowing them to store data locally. As part of its commitment to Latin America, AWS plans to invest over USD 5 billion in Mexico over the next 15 years. This new region is part of AWS's ongoing efforts to offer advanced and secure cloud technologies in Mexico.

The Mexican government implemented tax subsidies to tackle inflation, resulting in a USD 4.51 billion loss in 2022

- In April 2024, Pemex directed its trading unit to stop exporting up to 436,000 barrels per day (bpd) of crude oil to focus on processing domestic oil at the new Dos Bocas refinery in Tabasco. The refinery, which began producing gasoline and diesel in Q1 2024, aims to boost domestic oil processing from 713,300 bpd in 2023 to 1.04 million bpd in 2024. Since July 1, 2024, jet fuel prices have followed the "single price" scheme announced by Pemex in June. Previously, a volume discount program allowed major buyers to lower jet fuel costs through bulk purchases.
- Mexico has been working for 6 years to boost its refinery output and decrease reliance on US oil imports. Progress is evident as Pemex's domestic refineries processed over 1 million bpd of crude in March 2024, the highest in almost 8 years. This increase has led to a 32% rise in gasoline and diesel production and a 25% YoY drop in imports. The surge in refinery output has reduced Mexican crude exports by around 500,000 bpd. Although the government initially stated no significant export cuts, declining shipments and the potential start of the long-delayed 340,000 bpd Olmeca refinery by 2025 could reshape global oil flows.

## Mexico Freight and Logistics Industry Overview

The Mexico Freight and Logistics Market is fragmented, with the major five players in this market being A.P. Moller - Maersk, DHL Group, FedEx, Grupo Mexico and Traxion (sorted alphabetically).

Additional Benefits:

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

### **Table of Contents:**

1 EXECUTIVE SUMMARY & KEY FINDINGS

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## 2 REPORT OFFERS

## 3 INTRODUCTION

3.1 Study Assumptions & Market Definition

3.2 Scope of the Study?

3.3 Research Methodology

## 4 KEY INDUSTRY TRENDS

4.1 Demographics

4.2 GDP Distribution By Economic Activity

4.3 GDP Growth By Economic Activity

4.4 Inflation

4.5 Economic Performance And Profile

4.5.1 Trends in E-Commerce Industry

4.5.2 Trends in Manufacturing Industry

4.6 Transport And Storage Sector GDP

4.7 Export Trends

4.8 Import Trends

4.9 Fuel Price

4.10 Trucking Operational Costs

4.11 Trucking Fleet Size By Type

4.12 Logistics Performance

4.13 Major Truck Suppliers

4.14 Modal Share

4.15 Maritime Fleet Load Carrying Capacity

4.16 Liner Shipping Connectivity

4.17 Port Calls And Performance

4.18 Freight Pricing Trends

4.19 Freight Tonnage Trends

4.20 Infrastructure

4.21 Regulatory Framework (Road and Rail)

4.21.1 Mexico

4.22 Regulatory Framework (Sea and Air)

4.22.1 Mexico

4.23 Value Chain & Distribution Channel Analysis

5 MARKET SEGMENTATION (includes 1. Market value in USD for all segments 2. Market volume for select segments viz. freight transport, CEP (courier, express, and parcel) and warehousing & storage 3. Forecasts up to 2030 and analysis of growth prospects)

5.1 End User Industry

5.1.1 Agriculture, Fishing, and Forestry

5.1.2 Construction

5.1.3 Manufacturing

5.1.4 Oil and Gas, Mining and Quarrying

5.1.5 Wholesale and Retail Trade

5.1.6 Others

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- 5.2 Logistics Function
  - 5.2.1 Courier, Express, and Parcel (CEP)
    - 5.2.1.1 By Destination Type
      - 5.2.1.1.1 Domestic
      - 5.2.1.1.2 International
    - 5.2.2 Freight Forwarding
      - 5.2.2.1 By Mode Of Transport
        - 5.2.2.1.1 Air
        - 5.2.2.1.2 Sea and Inland Waterways
        - 5.2.2.1.3 Others
      - 5.2.3 Freight Transport
        - 5.2.3.1 By Mode Of Transport
          - 5.2.3.1.1 Air
          - 5.2.3.1.2 Pipelines
          - 5.2.3.1.3 Rail
          - 5.2.3.1.4 Road
          - 5.2.3.1.5 Sea and Inland Waterways
        - 5.2.4 Warehousing and Storage
          - 5.2.4.1 By Temperature Control
            - 5.2.4.1.1 Non-Temperature Controlled
            - 5.2.4.1.2 Temperature Controlled
        - 5.2.5 Other Services

## 6 COMPETITIVE LANDSCAPE

- 6.1 Key Strategic Moves
- 6.2 Market Share Analysis
- 6.3 Company Landscape
- 6.4 Company Profiles (includes Global Level Overview, Market Level Overview, Core Business Segments, Financials, Headcount, Key Information, Market Rank, Market Share, Products and Services, and Analysis of Recent Developments).
  - 6.4.1 A.P. Moller - Maersk
  - 6.4.2 Accel Logistics
  - 6.4.3 Aeromexico Cargo
  - 6.4.4 C.H. Robinson
  - 6.4.5 Deutsche Bahn AG (including DB Schenker)
  - 6.4.6 DHL Group
  - 6.4.7 DSV A/S (De Sammensluttede Vognmand af Air and Sea)
  - 6.4.8 Estafeta
  - 6.4.9 FedEx
  - 6.4.10 Fomento Economico Mexicano, S.A.B. de C.V. (including Solistica)
  - 6.4.11 Grupo FH
  - 6.4.12 Grupo Mexico
  - 6.4.13 Grupo TMM
  - 6.4.14 Hellmann Worldwide Logistics
  - 6.4.15 Kuehne+Nagel
  - 6.4.16 Nippon Express Holdings
  - 6.4.17 Penske Corporation (including Penske Logistics)
  - 6.4.18 Romeu

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- 6.4.19 Ryder System, Inc.
- 6.4.20 SEKO Bansard
- 6.4.21 Transportes Marva
- 6.4.22 Traxion
- 6.4.23 Trayecto GTM- Larmex
- 6.4.24 Tresguerras

## 7 KEY STRATEGIC QUESTIONS FOR FREIGHT AND LOGISTICS CEOS

## 8 APPENDIX

- 8.1 Global Overview
  - 8.1.1 Overview
  - 8.1.2 Porter's Five Forces Framework
  - 8.1.3 Global Value Chain Analysis
  - 8.1.4 Market Dynamics (Market Drivers, Restraints & Opportunities)
  - 8.1.5 Technological Advancements
- 8.2 Sources & References
- 8.3 List of Tables & Figures
- 8.4 Primary Insights
- 8.5 Data Pack
- 8.6 Glossary of Terms
- 8.7 Currency Exchange Rate

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