

South America Freight And Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The South America Freight And Logistics Market size is estimated at 244.3 billion USD in 2025, and is expected to reach 311.7 billion USD by 2030, growing at a CAGR of 5.00% during the forecast period (2025-2030).

E-commerce industry and infrastructure investments, developing the freight transport market in the region

- Brazil has set a target of attracting around BRL 180 billion (USD 34.03 billion) in private investments for new rail and highway projects from 2024 to 2026. This move is part of Brazil's broader efforts to modernize and expand its road infrastructure, which would bolster its long-haul trucking capabilities. In a notable development, the Inter-American Development Bank (IDB) sanctioned a USD 480 million loan in 2023 for the State of Sao Paulo Highway Investment Program. The initiative aims to enhance the state's production chains, improve production capacity, and foster regional integration. Brazil has set its sights on securing USD 62 billion in highway investments by 2026.
- The rapid growth of e-commerce in South America is fueling the demand for transportation services. In 2023, the region's e-commerce sector generated revenues of USD 58.38 billion, marking a significant increase from USD 51.79 billion in 2022. Projections indicate a CAGR of 13.50% from 2023 to 2027, with revenues expected to reach USD 96.87 billion by 2027. The user base is also set to expand, with estimates pegging it at 244.1 million by 2025. In 2022, the user penetration rate stood at 54.0%, and it is projected to rise to 58.7% by 2025.

Growth and transition in South America's freight and logistics

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- Brazil is one of the major economies in the region, along with Argentina, Chile, Colombia, and Peru. Brazil is working toward sustainable transport and adopting clean technologies for truck fleets. For instance, Ambev, a Brazilian brewing company owned by Anheuser-Busch InBev, collaborated with electric truck supplier FNM to receive around 1,000 electric trucks by the end of 2023. Brazil witnessed the adoption of electric trucks in mining. For instance, in October 2022, Vale announced testing 72-tonne off-highway trucks at Agua Limpa in Minas Gerais. These significant technological innovations and growing demand for freight transport across several sectors.
- In Argentina, in September 2023, DHL Express launched new freighter flights between Miami and Buenos Aires to improve delivery efficiency. These flights, managed by DHL Aero Expreso in Panama, use a B767-300 freighter with a 52-ton capacity. Operating six times weekly, the service goes from Miami International Airport (MIA) to Buenos Aires (EZE) via Santiago, Chile (SCL), and back. This initiative aims to speed up customs clearance in Argentina by 10% on the same day as arrival and increase same-day deliveries by 50%.

South America Freight And Logistics Market Trends

South American countries are investing heavily in infrastructure development to improve the transportation sector

- In June 2024, Argentina's federal government transferred 914 infrastructure projects to provincial authorities, creating a tough financial challenge for the provinces. Despite wanting to resume public works, provinces have faced deep cuts to federal transfers, their main source of income. Federal tax transfers (CFI) to provinces dropped 20% YoY in June 2024 and have decreased by double digits in five out of the six months of 2024. Other federal transfers (RON) also fell 24.1% in June.
- In 2023, the Brazilian government allocated USD 2.59 billion to infrastructure logistics, encompassing highways, railways, ports, and airports. A significant portion, approximately USD 2.42 billion, was funneled into highways, while railways received a modest allocation of USD 30.25 million. Looking ahead, by June 2024, the government is set to launch a major national initiative aimed at amplifying investments in freight rail projects, leveraging a blend of public and private sector funding. With an ambitious vision, the government plans to inject a substantial USD 4 billion into these rail projects.

Crude oil prices in the region rose significantly owing to the impact of the Russia-Ukraine War on global crude oil

- In March 2024, seasonal fluctuations and signs of an economic slowdown led to a decline in Diesel demand in Brazil. Petrobras' decision to reduce Diesel prices, coupled with the mandated increase in biodiesel blending from 12% to 14%, further fueled this drop in demand for conventional fossil Diesel. The domestic market was also swayed by global fluctuations in crude oil prices and government efforts to stabilize them. Even with an excess of 3.2 million barrels of Russian Diesel on hand, Brazil maintained its shipments without a complete halt.
- By 2030, Chile plans to launch large-scale production of sustainable aviation fuel (SAF) and aims for these biofuel sources derived from oils, fats, and both biological and municipal waste to satisfy half of its aviation fuel needs by 2050. With projections of air traffic doubling by 2040, Chile views SAF as a pivotal element in its decarbonization strategy. Moreover, SAF can be blended with traditional jet fuel to reduce emissions by up to 80% without engine modifications. It is expected to contribute over half of Chile's targeted carbon emissions reductions, playing a key role in the country's net-zero goals.

South America Freight And Logistics Industry Overview

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The South America Freight And Logistics Market is fragmented, with the major five players in this market being CMA CGM Group (including CEVA Logistics), DHL Group, DP World, DSV A/S (De Sammensluttede Vognmand af Air and Sea) and Kuehne+Nagel (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

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 Argentina

4.21.2 Brazil

4.21.3 Chile

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4.22 Regulatory Framework (Sea and Air)

4.22.1 Argentina

4.22.2 Brazil

4.22.3 Chile

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

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

5.3 Country

5.3.1 Argentina

5.3.2 Brazil

5.3.3 Chile

5.3.4 Rest of South America

6 COMPETITIVE LANDSCAPE

6.1 Key Strategic Moves

6.2 Market Share Analysis

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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 Agunsa

6.4.2 Alonso Group

6.4.3 Americold

6.4.4 CMA CGM Group (including CEVA Logistics)

6.4.5 Deutsche Bahn AG (including DB Schenker)

6.4.6 DHL Group

6.4.7 DP World

6.4.8 DSV A/S (De Sammensluttede Vognmænd af Air and Sea)

6.4.9 Kuehne+Nagel

6.4.10 Romeu

6.4.11 SAAM

6.4.12 TASA Logistica

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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