

Mexico Freight And Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

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Report description:

Mexico Freight And Logistics Market Analysis

Mexico freight and logistics market size in 2026 is estimated at USD 131.06 billion, growing from 2025 value of USD 124.36 billion with 2031 projections showing USD 170.39 billion, growing at 5.39% CAGR over 2026-2031. Cross-border manufacturing relocation, surging e-commerce activity, and record bilateral trade volumes with the United States are widening the opportunity set for third-party logistics (3PL) providers. Multimodal network expansion, warehouse automation incentives, and large-scale public works such as Tren Maya and the Inter-Oceanic Corridor of the Isthmus of Tehuantepec (CIIT) are unlocking new corridors and relieving capacity constraints. Growing demand for temperature-controlled services, semiconductor supply-chain shifts driven by the CHIPS Act, and the proliferation of AI-enabled freight-tech platforms are further bolstering operational efficiency and service differentiation. At the same time, heightened security threats, stringent Complemento Carta Porte 3.0 documentation rules, and power-grid bottlenecks in key industrial zones temper short-run margins even as structural growth drivers remain intact. Competition is moving toward integrated, compliance-ready, and technology-rich offerings that can absorb regulatory complexity while orchestrating cost-efficient, end-to-end cross-border flows.

Mexico Freight And Logistics Market Trends and Insights

Near-Shoring Wave Boosts Cross-Border Volumes

Production migration from Asia to Mexico continues to realign North American supply chains, underpinning sustained volume

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growth for the Mexico freight and logistics market. Monthly U.S.-Mexico commercial moves surpassed 25,000 in 2024-2025, a level that has normalized rather than spiked, reflecting structural instead of cyclical change. USMCA preferences now cover an expanding set of automotive, textile, and medical device inputs, further incentivizing near-shore sourcing. Manufacturers report lower inventory buffers because shorter transit times allow leaner just-in-time models, resulting in higher shipment frequency even without additional production. Cross-border specialists that combine customs brokerage, bonded warehousing, and real-time shipment visibility are gaining share as shippers seek a single command center for North American flows. As reshoring rhetoric hardens into multi-year capital-expenditure pipelines, cross-border freight acts as the backbone for incremental value-added manufacturing in Mexico.

E-Commerce/CEP Boom

Digital buying habits accelerated during the pandemic and have since stabilized at elevated levels, propelling CEP volumes beyond pre-2020 trajectories. Domestic parcel density is deepening in secondary and tertiary cities, prompting network redesigns that favor micro-fulfillment hubs and electric-vehicle last-mile fleets. Cross-border e-commerce is growing even faster after major platforms began positioning inventory in Mexican free-trade zones to minimize duty exposure. The 19% flat duty on non-FTA courier imports instituted in early 2025 increased landed costs for drop-shipped parcels but simultaneously boosted demand for in-country fulfillment and the Mexico freight and logistics market capacity. Fast-fashion retailers now integrate Mexican warehouses into North American flash-sale calendars, necessitating late cutoff times and weekend sort-hub operations. CEP providers that have deployed automated sortation and data-driven delivery routing are capturing a disproportionate share of the incremental revenue.

Cargo-Theft and Road-Security Risk

Despite the "Balam" highway-security initiative, cargo-theft incidents rose 7% in 2024, forcing operators to assign escorts on high-risk lanes and install dual-satellite trackers. Insurance premiums climbed 11%, while downtime for claims processing averages 9 days, hampering asset utilization. Security escalates operating expenses by 15-20% on sensitive loads such as pharmaceuticals and electronics, eroding thin margins in the Mexico freight and logistics market. Persistent risk also dissuades some foreign shippers from consolidating loads, driving inefficient partial-truck moves that raise costs system-wide.

Other drivers and restraints analyzed in the detailed report include:

Infrastructure Megaprojects (Tren Maya, CIIT)
Digital-Tax Incentives for Warehouse Automation
Complemento Carta Porte 3.0
Compliance Cost

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Manufacturing generated 40.72% of Mexico freight and logistics market size in 2025, driven by automotive, electronics, and medical-device exports. Engine block, wire harness, and consumer-electronics flows underpin year-round truck and rail demand with minimal seasonality. OEM preference for near-plant vendor-managed-inventory warehouses increases contract lengths for 3PLs that can offer bonded storage and just-in-sequence shuttles.

Wholesale and retail trade, although smaller in absolute value, is the fastest-growing vertical at a 5.68% CAGR (2026-2031). Omnichannel retailers are merging distribution center (DC) and store-replenishment inventory into unified fulfillment models that require real-time visibility and CEP-grade cycle times. Temperature-controlled pharmaceuticals and perishables, aided by fiscal incentives, are boosting specialized warehousing revenues, nudging the Mexico freight and logistics industry toward

higher-margin service tiers.

Freight transport retained 60.45% of Mexico freight and logistics market share in 2025, reflecting the country's manufacturing-driven cargo mix. The segment benefits from dense north-south lanes and steady contractual volumes tied to maquiladora export programs. Value-added truckload offerings, drop-trailer pools, single-invoice cross-border solutions, and digitally tracked milestones, are eclipsing basic haulage. The Mexico freight and logistics market size attached to courier, express, and parcel is smaller but rising at a 6.08% CAGR (2026-2031), thanks to e-commerce and cross-border small-package trade.

CEP providers invest heavily in automated sorters, locker networks and AI-based route optimization to meet one-day delivery promises in Tier-1 and Tier-2 cities. Freight forwarding and contract logistics divisions are bundling customs brokerage and inventory planning, blurring historical line items within the Mexico freight and logistics industry. As shippers consolidate vendor lists, integrated operators capable of bilateral service terms are advancing faster than stand-alone transporters.

The Mexico Freight and Logistics Market Report is Segmented by End User Industry (Agriculture, Fishing, and Forestry, Construction, Manufacturing, Oil and Gas, Mining and Quarrying, Wholesale and Retail Trade, and Others) and by Logistics Function (Courier, Express, and Parcel (CEP), Freight Forwarding, Freight Transport, Warehousing and Storage, and Other Services). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

A.P. Moller - Maersk Accel Logistics, Inc. Aeromexico Cargo Americold Logistics, LLC C.H. Robinson CPKC Mexico DHL Group DSV A/S (Including DB Schenker) Estafeta FedEx Frialsa Grupo FH Grupo Mexico Grupo TMM Kuehne+Nagel Penske Corporation, Inc. Romeu Ryder System, Inc. SEKO Logistics Fomento Economico Mexicano, S.A.B. de C.V. (Including Solistica) Transportes Marva Traxion Trayecto GTM-Larmex Tresguerras United Parcel Service of America, Inc. (UPS)

Additional Benefits:

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

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