

Mexico Last Mile Delivery - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-01-16 | 150 pages | Mordor Intelligence

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Report description:

Mexico Last Mile Delivery Market Analysis

The Mexico Last Mile Delivery Market size in 2026 is estimated at USD 17.45 billion, growing from 2025 value of USD 15.63 billion with 2031 projections showing USD 30.26 billion, growing at 11.63% CAGR over 2026-2031.

Accelerated nearshoring inflows, surging e-commerce adoption, and continuous regulatory modernization are the primary forces sustaining this double-digit trajectory. At the same time, Nuevo Leon's 5.8% GDP increase in Q3 2024 highlights the dual-demand structure that blends B2B parcel flows from factories with expanding urban B2C volumes. Standard delivery still dominates, yet consumer appetite for same-day service pushes carriers to redesign networks around urban micro-fulfillment nodes. B2C shipments account for 61% of total parcels, but healthcare-focused traffic is the fastest climber as telemedicine normalizes prescription home delivery.

Mexico Last Mile Delivery Market Trends and Insights

Explosive E-commerce Order Growth

Parcel volumes continue to escalate as Mexico advances to the top tier of Latin America's digital economies, with 94% of online purchases transacted over mobile interfaces. Cross-border click-to-door expectations intensify; consumers seamlessly buy from U.S. and Asian sellers, compelling carriers to master customs clearance within last-mile workflows. Internet penetration climbed to

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86% in 2024 and should touch 98% by 2029, unlocking smaller cities where delivery density still challenges cost models. Providers race to overlay real-time tracking and flexible slots into apps that already house payment and shopping functions. The net result keeps Mexico last-mile delivery market volumes on an upward spiral as retail, electronics, and grocery orders converge on the same networks.

Rising Consumer Demand for Same-day / Instant Delivery

Urban shoppers now view 24-hour fulfillment as baseline, spurring an 8.10% CAGR forecast for same-day services to 2030. Mexico City ranks as the world's most congested city, with average travel times 52% longer than free-flow conditions, yet this congestion paradoxically fuels doorstep service demand. Mercado Libre underscored the trend by budgeting USD 3.4 billion for 2025 logistics expansion, elevating its same-day footprint to more than 25 cities. However, compressed timelines strain route economics as carriers must balance premium pricing against growing competitive parity. Micro-fulfillment-inventory staged within 5-10 kilometers of shoppers-emerges as the structural workaround that preserves margins while meeting two-hour promises.

High Last-mile Operating Costs

Fuel, vehicle upkeep, and labor compose a cost structure that remains stubbornly elevated relative to parcel revenue in lower-density areas. Temperature-controlled loads can double baseline expenses, constraining healthcare growth outside top metros. Amazon Mexico's hybrid model-mixing in-house vans with 100+ local partners and gig-drivers paid roughly MXN 110 (USD 5.4) per hour-illustrates creative hedging against cost inflation. Route-optimization software and predictive demand analytics shave kilometers, yet poor road quality in some states offsets gains. If unaddressed, structural cost headwinds could trim Mexico last-mile delivery market profit pools even as volumes rise.

Other drivers and restraints analyzed in the detailed report include:

Rise of Vertical Urban Micro-fulfillment Hubs
Nearshoring-fuelled Cross-border Parcel Flows
Urban Congestion & Inadequate Road Infrastructure

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

Segment Analysis

Standard delivery held 53.20% of the Mexico last mile delivery market share in 2025 and forms the backbone of route planning across 2-5-day windows. Price sensitivity among mass-market consumers keeps this tier relevant even as same-day demand rises. The Mexico last mile delivery market size for standard service is projected to expand steadily in absolute terms, supported by rural network densification and cross-border SMB exports. Yet carriers face margin compression because longer dwell times amplify inventory carrying costs for merchants.

Parallely, express and same-day tiers command widening premiums as grocers, electronics sellers, and pharmacies test sub-24-hour guarantees. Same-day's 7.99% CAGR (2026-2031) signals a structural pivot toward speed, although high fee elasticity limits mass adoption. Investment in micro-fulfillment and AI-driven dispatch helps carriers shift more parcels into faster lanes without cannibalizing standard efficiencies.

The Mexico Last Mile Delivery Market Report is Segmented by Service (Standard Delivery, Same-Day, and Express Delivery), Business Model (Business-To-Business (B2B), Business-To-Consumer (B2C), and Customer-To-Consumer (C2C)), End-User Industry (E-Commerce Retail, Fashion & Lifestyle, Beauty, Wellness & Personal Care, and More), Region (North, Central, West, and More). The Market Forecasts are Provided in Terms of Value (USD).

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List of Companies Covered in this Report:

DHL Group FedEx Corporation United Parcel Service (UPS) Paquetexpress Mercado Libre (Mercado Envios) J&T Express Mexico XPO Logistics DSV C.H. Robinson Borzo (Dostavista) Buho Logistics APL Logistics Gomsa Logistics Quick Mexico Kiki Latam SupTra de Mexico CEVA Logistics Grupo AMPM WHL Logistics AIT Worldwide Logistics, Inc.

Additional Benefits:

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

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