

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

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### **Report description:**

Argentina Freight And Logistics Market Analysis

The Argentina freight and logistics market was valued at USD 28.31 billion in 2025 and estimated to grow from USD 29.74 billion in 2026 to reach USD 38.06 billion by 2031, at a CAGR of 5.05% during the forecast period (2026-2031). Robust agricultural exports, sustained e-commerce momentum, and capital inflows catalyzed by the long-horizon RIGI tax framework underpin the growth outlook of the Argentina freight and logistics market. Structural reforms encourage multimodal infrastructure upgrades, while technology adoption-from digital freight-matching platforms to warehouse automation-elevates operating efficiency across transport modes. Consolidation, illustrated by DSV's high-profile acquisition of DB Schenker, intensifies competition and broadens integrated service offerings that appeal to shippers coping with currency volatility. Meanwhile, public-private partnerships around the Hidrovia Paraguay-Parana waterway and Belgrano Cargas railway corridors signal a policy commitment to decongest over-utilized highways and lower export logistics costs.

Argentina Freight And Logistics Market Trends and Insights

Growth of E-Commerce Boosting Parcel Volumes

E-commerce adoption surpassed critical mass in major urban centers, prompting platforms such as Mercado Libre to build fulfillment hubs capable of supporting same-day delivery expectations. Couriers now reconfigure warehouse footprints toward last-mile proximity rather than bulk storage, improving route density and cutting urban delivery times. Digital-native operators

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deploy AI-driven dispatch tools to reduce idle fleet time and capture share from conventional carriers that struggle with cost parity on expedited services. Pharmaceutical e-prescription rollouts add regulated, temperature-controlled parcels to CEP networks, lifting average revenue per shipment. Together, these shifts underpin demand that grows faster than the underlying Argentina freight and logistics market, compelling traditional forwarders to integrate parcel solutions within broader service suites.

#### Government Investment in Multimodal Infrastructure

The USD 10-12 billion Hidrovia concession elevates channel depth to 42 feet, enabling Panamax vessel access and reducing per-ton export costs for grains and proteins. Concurrently, Belgrano Cargas privatization under Decree 60/2025 shifts freight rail management to private operators, accelerating asset renewal and boosting network velocity. The RIGI framework anchors investor confidence by offering 30-year tax stability, funneling capital toward roads, ports, and intermodal terminals. Early gains are evident: Belgrano Norte lifted train frequency by 40% within twelve months of concession handover, translating to lower truck congestion on parallel highways. Over the medium term, these upgrades diversify modal mix, trimming logistics costs that historically eroded exporter competitiveness.

#### Macroeconomic Instability and Currency Volatility

Peso fluctuations complicate freight contract pricing because diesel, spares, and imported equipment are dollar-denominated. Import permits, although simplified, still incur bureaucratic delays that distort inventory planning. Energy subsidy cuts from 2024 elevated operating costs, compressing thin trucking margins. Inflation forces carriers to renegotiate tariffs frequently, eroding the predictability valued by global shippers. Limited foreign-exchange access constrains smaller fleets from procuring new vehicles, delaying fleet modernization and restraining service quality improvements in the Argentina freight and logistics industry.

Other drivers and restraints analyzed in the detailed report include:

Expansion of Agricultural Exports  
Near-Shoring Inflows from Brazil and U.S. Manufacturers  
Aging Road and Rail Infrastructure  
Bottlenecks

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

#### Segment Analysis

Manufacturing contributed 34.12% of the Argentina freight and logistics market share in 2025, anchored by automotive, food processing, and consumer durables clusters. Auto OEMs rely on just-in-sequence trucking to feed Cordoba assembly lines, demanding 99.5% on-time performance thresholds. Food processors in Santa Fe commit to long-term contracts for reefer capacity to protect export brand reputation. Inbound raw-material flows stretch from Mercosur aluminum suppliers to Asian semiconductor vendors, reinforcing the need for multimodal resilience amid currency volatility.

Wholesale and retail trade is expected to grow at a 5.53% CAGR between 2026-2031, energized by click-and-collect formats and mobile wallet adoption. Fulfillment footprints migrate from single mega-warehouses to a constellation of urban nodes, shortening last-mile legs and slashing failed-delivery incidents. Retail giants co-locate inventory with 3PLs to defer fixed-capital commitments, buying flexibility in the face of unpredictable consumption swings. Apparel and electronics shippers favor bonded warehouses near Ezeiza airport, cutting customs dwell time for high-value imports. The symbiosis between retailers and logistics partners intensifies integration and data sharing, boosting network agility across the Argentina freight and logistics market.

Freight transport generated the largest slice of the Argentina freight and logistics market size at 60.10% share attached to bulk commodity movements. Road tractors and hopper wagons shuttle soy, corn, and beef toward the Gran Rosario complex, while

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project-cargo specialists ferry drilling rigs to Neuquen's shale basin. Digital freight platforms reduce empty-mile ratios by matching return legs in real time, trimming carrier operating costs and greenhouse emissions simultaneously. Freight forwarding arms add visibility through blockchain-backed document exchange, satisfying exporters' compliance needs. Within this landscape, CEP commands only a modest share today but enjoys a 5.92% CAGR (2026-2031) tailwind that outstrips the broader Argentina freight and logistics market.

Courier, express, and parcel operators scale micro-fulfillment centers inside dense neighborhoods, cutting last-mile trips to sub-15-kilometer averages. Same-day delivery penetration reached 23% of total e-commerce orders in Buenos Aires during 2025, nudging shippers toward hybrid inventory models that blend fulfillment center and dark-store formats. Cross-dock terminals integrate barcode sorting with IoT temperature sensors, making cold-chain parcel launches viable for biologics distribution. Freight transport incumbents leverage existing depots to create parcel pick-up drops, safeguarding market relevance as consumer delivery expectations evolve. Collectively, these strategic pivots aim to preserve leadership while capitalizing on high-margin CEP growth pockets within the Argentina freight and logistics market.

The Argentina 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 Agencias Universales SA (AGUNSA) Americold Andreani Grupo Logistico DHL Group Dibiagi Group DSV A/S (Including DB Schenker) FedEx International Cargo Kuehne + Nagel MercadoLibre, Inc. NYK (Nippon Yusen Kaisha) Line OCA Global Corporate Service SA OCASA Pan American Energy SL Romeu TASA Logistica Tefasa Transporte Frios del Norte United Parcel Service of America, Inc. (UPS)

Additional Benefits:

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

**Table of Contents:**

- 1 Introduction
  - 1.1 Study Assumptions and Market Definition
  - 1.2 Scope of the Study
- 2 Research Methodology
- 3 Executive Summary
- 4 Market Landscape
  - 4.1 Market Overview
  - 4.2 Demographics
  - 4.3 GDP Distribution by Economic Activity
  - 4.4 GDP Growth by Economic Activity
  - 4.5 Inflation
  - 4.6 Economic Performance and Profile

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- 4.6.1 Trends in E-Commerce Industry
- 4.6.2 Trends in Manufacturing Industry
- 4.7 Transport and Storage Sector GDP
- 4.8 Export Trends
- 4.9 Import Trends
- 4.10 Fuel Price
- 4.11 Trucking Operational Costs
- 4.12 Trucking Fleet Size By Type
- 4.13 Major Truck Suppliers
- 4.14 Logistics Performance
- 4.15 Modal Share
- 4.16 Maritime Fleet Load Carrying Capacity
- 4.17 Liner Shipping Connectivity
- 4.18 Port Calls And Performance
- 4.19 Freight Pricing Trends
- 4.20 Freight Tonnage Trends
- 4.21 Infrastructure
- 4.22 Regulatory Framework (Road and Rail)
- 4.23 Regulatory Framework (Sea and Air)
- 4.24 Value Chain and Distribution Channel Analysis
- 4.25 Market Drivers
  - 4.25.1 Growth of E-Commerce Boosting Parcel Volumes
  - 4.25.2 Government Investment in Multimodal Infrastructure
  - 4.25.3 Expansion of Agricultural Exports (Soy, Corn, Beef)
  - 4.25.4 Near-Shoring Inflows from Brazil and U.S. Manufacturers
  - 4.25.5 Cold-Chain Build-Out for Lithium Batteries and Pharma
  - 4.25.6 Digital Freight-Matching Platforms Lowering Empty-Mile Ratio
- 4.26 Market Restraints
  - 4.26.1 Macroeconomic Instability and Currency Volatility
  - 4.26.2 Aging Road and Rail Infrastructure Bottlenecks
  - 4.26.3 Restrictive Cabotage Regulations for Foreign Carriers
  - 4.26.4 Inland Shortage of Intermodal Containers
- 4.27 Technology Innovations in the Market
- 4.28 Porter's Five Forces Analysis
  - 4.28.1 Threat of New Entrants
  - 4.28.2 Bargaining Power of Buyers
  - 4.28.3 Bargaining Power of Suppliers
  - 4.28.4 Threat of Substitutes
  - 4.28.5 Competitive Rivalry

## 5 Market Size and Growth Forecasts (Value, USD)

- 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

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- 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

## 6 Competitive Landscape

- 6.1 Market Concentration
- 6.2 Key Strategic Moves
- 6.3 Market Share Analysis
- 6.4 Company Profiles (Includes Global Level Overview, Market Level Overview, Core Segments, Financials as Available, Strategic Information, Market Rank/Share for Key Companies, Products and Services, and Recent Developments)
  - 6.4.1 A.P. Moller - Maersk
  - 6.4.2 Agencias Universales SA (AGUNSA)
  - 6.4.3 Americold
  - 6.4.4 Andreani Grupo Logistico
  - 6.4.5 DHL Group
  - 6.4.6 Dibiagi Group
  - 6.4.7 DSV A/S (Including DB Schenker)
  - 6.4.8 FedEx
  - 6.4.9 International Cargo
  - 6.4.10 Kuehne + Nagel
  - 6.4.11 MercadoLibre, Inc.
  - 6.4.12 NYK (Nippon Yusen Kaisha) Line
  - 6.4.13 OCA Global Corporate Service SA
  - 6.4.14 OCASA
  - 6.4.15 Pan American Energy SL
  - 6.4.16 Romeu
  - 6.4.17 TASA Logistica

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6.4.18 Tefasa

6.4.19 Transporte Frios del Norte

6.4.20 United Parcel Service of America, Inc. (UPS)

7 Market Opportunities and Future Outlook

7.1 White-space and Unmet-Need Assessment

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