

Argentina Road Freight Transport - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

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Report description:

Argentina Road Freight Transport Market Analysis

The Argentina Road Freight Transport Market is expected to grow from USD 13.21 billion in 2025 to USD 13.85 billion in 2026 and is forecast to reach USD 17.58 billion by 2031 at 4.88% CAGR over 2026-2031.

Robust agri-commodity flows to neighboring Brazil and Chile, accelerated lithium-triangle mining projects in the northwest, and the rapid scale-up of omnichannel retail logistics underpin this expansion of the Argentina road freight transport market. Nearshoring helps reroute grain, poultry, and soy-byproduct exports through land borders instead of congested ports, while e-commerce platforms build fulfillment networks that raise shipment frequency and tighten delivery windows. Operators that modernize fleets, employ fuel-efficiency technologies, and integrate digital transport management solutions are gaining cost advantages as diesel subsidies phase out. At the same time, public works focused on corridor resurfacing and port-access upgrades ease bottlenecks along Buenos Aires-Rosario and the bioceanic corridor, reinforcing the competitiveness of the Argentina road freight transport market.

Argentina Road Freight Transport Market Trends and Insights

Nearshoring-Fuelled Agri-Commodity Exports to Brazil and Chile

Streamlined customs protocols approved under the Bioceanic Corridor program enable trucks to cross the Chilean and Brazilian

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borders with fewer inspections, cutting dwell times and spurring new contract volumes for grain and poultry shippers [panorama-minero.com]. More than 80% of Argentina's poultry processing occurs in Buenos Aires and Entre Rios, concentrating refrigerated backhaul for chilled chicken exports. The August 2024 cut in poultry export tax from 9% to 6.75% improved margins and lifted outbound loads. As processors can raise throughput by 10% without extra plant investments, carriers serving these hubs secure stable lanes and higher equipment utilization. Cold-chain specialists secure premium rates while mainstream dry-van haulers capture soymeal and corn flows redirected from trans-Atlantic markets to nearer customers.

Lithium-Triangle Mining Boom in Northwest Provinces

Companies such as Livent expanded extraction capacity and commissioned brine concentration ponds above 4,000 meters altitude, which require purpose-built off-road rigs and chemical tankers. Continuous mine-site activity circumvents the seasonality of agriculture, granting carriers predictable annual operating windows. High value-to-weight lithium salts justify long-haul legs to Santa Fe and Buenos Aires for export packing, underpinning profitable lane density in corridors previously underutilized. Provincial incentives that earmark toll rebates and rest-stop infrastructure for mining supply trucks are drawing niche operators into the region, widening fleet specialization within the Argentina road freight transport market.

Diesel-Price Volatility Under Fuel-Subsidy Phase-Out

Decreto 296/2025 froze fuel taxes only until June 2025, after which pump prices fully indexed to Brent benchmarks [boletinoficial.gob.ar]. Fuel historically consumes 25-35% of long-haul operators' cost base, so day-to-day swings compress thin margins and complicate contract quoting. Larger fleets hedge exposure via bulk-buy agreements, whereas single-truck owner-drivers pass volatility through spot-rate surcharges, risking shipment deferrals. Carriers serving remote mining zones often pay premiums of 20-25 cents per liter versus coastal stations, adding route-planning complexity and incentivizing investments in auxiliary tanks and telematics-guided refueling stops.

Other drivers and restraints analyzed in the detailed report include:

E-Commerce Same-Day Delivery Race Gradual Recovery in Truck OEM Financing Antiquated Truck Fleet Raises OPEX and Emissions

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

Segment Analysis

The end-user landscape remained anchored in wholesale and retail trade, which commanded 37.65% of revenue in 2025. Nevertheless, manufacturing workloads rose 4.98% annually and are set to chip away at the dominance of consumption-linked freight. Tailored incentives under the Large Investment Incentive Regime have already logged over USD 6 billion in approved factory builds since its extension to logistics infrastructure in February 2025 [boletinoficial.gob.ar]. The resulting pipeline of automotive parts, home appliances, and agro-machinery shipments injects steadier all-year demand into the Argentina road freight transport market. Oil, gas, mining, and quarrying account for a smaller load count but generate high-tariff moves owing to oversize and hazardous classifications. Liquids tied to Vaca Muerta and lithium concentrates from the northwest sustain contract rates that outpace CPI, buffering operators against currency swings. Agriculture, fishing, and forestry retain baseline volume through grain and protein exports, although climate-driven yield volatility occasionally forces carriers to reposition empty trailers, shaving utilization.

Diversity across end-users underpins a more resilient revenue mix. Manufacturing's growing slice introduces time-sensitive just-in-sequence pickups that suit less-than-truckload offerings, while agribusiness remains anchored in bulk full truckload dispatches. Pharmaceutical expansion lifts temperature-controlled miles, whereas industrial chemicals add demand for

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ADR-licensed drivers. Forwarders able to straddle these niches deploying dual-compartment reefers or drop-deck tankers win multiproduct tenders and fortify wallet share. Consequently, the Argentina road freight transport market tends toward service bundling, wherein carriers cross-sell warehousing, packaging, and inventory control to defend margins.

Domestic moves retained 63.25% share in 2025, largely due to Buenos Aires urban sprawl funneling consumer goods inward. Yet cross-border hauls to Chile and Brazil are poised to surge at 5.71% CAGR through 2031, shrinking the domestic ratio of the Argentina road freight transport market size. The revival of the Mercosur Customs Code and rollout of joint customs posts slice border dwell time by as much as 30 minutes per truck, translating into extra turns per week. Refrigerated fleets exploit this to ferry poultry and chilled beef to Chile's ports for Asian trans-shipments, banking on higher backhaul loads of imported fertilizers. Domestic players, for their part, capitalize on e-commerce spikes and inter-provincial supermarket replenishment runs, activities that intensify peak-season congestion but justify dynamic pricing tools.

International specialization rewards carriers possessing bilingual crews, Carnet de Passage guarantees, and real-time compliance dashboards, all of which raise entry barriers. Meanwhile, micro-enterprises concentrate on intraprovincial work rounds, often outside the formal tax net, keeping the domestic segment atomized. This duality nurtures uneven adoption of electronic consignment notes, with international lanes nearing 70% digitalization while local bills of lading remain paper-centric. Policy makers eye nationwide harmonization, but until then, split-fleet operators juggle disparate documentation regimes.

Full truckload shipments dominated with 77.05% of 2025 revenue, reflective of bulk grains and petroleum cargoes. However, the less-than-truckload segment advances at 5.44% CAGR thanks to tighter delivery windows and SKU proliferation. Urban consolidation centers erected by 3PLs in Cordoba and Rosario enable route-based aggregation, reducing empty kilometers and lifting asset turns. Algorithms allocate pallets across multi-drop runs, flattening the cost curve per hundredweight and letting LTL from Argentina road freight transport industry undercut small-volume FTL quotes. FTL remains indispensable for bulk harvest peaks and oilfield pipe moves yet is under margin pressure due to fuel volatility. To mitigate this, leading FTL providers retrofit trailers with side doors and movable bulkheads, morphing tractors into dual-use assets that can also serve LTL on backhauls, thereby softening seasonal lulls.

The Argentina Road Freight Transport Market Report is Segmented by Destination (Domestic, and More), End-User Industry (Construction, and More), Truckload Specification (Full Truckload, and More), Containerization (Containerised, and More), Distance (Long Haul, and More), Goods Configuration (Fluid Goods, and More), Temperature Control (Temperature Controlled, and More). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Andreani Logistica S.A. TASA Logistica Rivas Transportes TransFarmaco S.A. Servicargo Internacional Sea Side Logistics Clover Logistics Yusen Logistics DHL Group ID Logistics Transporte Pedrito Geodis DSV CEVA Logistics Rohlig Logistics Pentagon Freight JAS Worldwide LOG4 Logistics solutions TRANSPORTE DOCAMPO Crane Worldwide Logistics

Additional Benefits:

 The market estimate (ME) sheet in Excel format
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