

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

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Report description:

Brazil Freight And Logistics Market Analysis

Brazil freight and logistics market size in 2026 is estimated at USD 116.42 billion, growing from 2025 value of USD 111.11 billion with 2031 projections showing USD 147.06 billion, growing at 4.78% CAGR over 2026-2031. This expansion reflects the government's infrastructure push under Novo PAC, rising agricultural output, and e-commerce momentum. Modal diversification is accelerating as cabotage and rail capture share from an over-reliant road system, while air freight gains relevance for high-value, time-sensitive goods. Foreign direct investment in port concessions, railway upgrades, and technology platforms is reshaping competition. The combination of record soybean and corn harvests, a fragmented carrier base, and technology-driven efficiency gains is creating headroom for integrated service providers that can orchestrate end-to-end solutions.

Brazil Freight And Logistics Market Trends and Insights

E-commerce Fulfilment Boom

Brazil's online retail sales expanded 16% in 2024, spurring dense networks of micro-fulfilment centers near major consumption hubs. Courier, Express, and Parcel providers are scaling automation, route-optimization software, and temperature-controlled lockers to meet same-day promises. The August 2024 20% import tariff on purchases up to USD 50 encourages cross-border platforms such as Shopee to stock inventory locally, fueling warehouse demand in secondary cities. As retailers integrate inventory across stores, dark stores, and fulfilment centers, real-time visibility becomes a competitive differentiator. The resulting

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parcel density underpins the 5.56% CAGR forecast for CEP, outpacing the wider Brazil freight and logistics market.

Agribulk Export Momentum from Northern Arc Ports

Northern Arc terminals are shortening interior truck hauls by up to 1,000 km compared with southern ports, lowering logistics costs for grain producers. Soybean exports projected at 105.47 million tons and corn at 34 million tons in 2024-25 are catalyzing rail links such as VLI's Ferrovia Norte-Sul expansion. Private concessions at ports of Itaquí and Miritituba add berth capacity tailored to Panamax vessels, while berth deepening at Santos signals southern ports' competitive response. Chinese investors, notably China Merchants Group, are evaluating stakes, reinforcing long-term capital inflows. The modal shift eases road congestion and supports the Brazil freight and logistics market's margin growth.

Persistent Cabotage Cost Differential vs Road

Even after 20% growth to 1.55 million containers in 2024, cabotage remains costlier than trucking on many legs because terminal handling fees add up to 35% of total door-to-door transport costs. Although the BR do Mar law permits foreign vessel chartering, port congestion persists during soybean peaks, eroding schedule reliability. Cargo owners shipping perishable goods continue to favor road despite higher emissions, delaying the modal rebalance necessary for the Brazil freight and logistics market to hit sustainability targets. Streamlined customs and harmonized port fees could narrow the gap but require multi-agency coordination.

Other drivers and restraints analyzed in the detailed report include:

Reshoring of Automotive OEM Supply Chains Digital Freight-Matching Platforms Achieving Scale Slow Rail Gauge Standardization

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

Segment Analysis

Manufacturing tallied 38.36% of the Brazil freight and logistics market share during 2025. Automotive, machinery, and packaged consumer goods create round-trip flows that stabilize asset utilization. However, Wholesale and Retail Trade, helped by omnichannel strategies, will deliver a 5.05% CAGR between 2026-2031, shifting focus to high-SKU, low-weight parcels and inventory pooling. Grocery retailers invest in dark-store picking models that redefine urban warehouse footprints.

Agriculture, Fishing, and Forestry demand surges during harvest windows when grain volumes stretch truck availability, stressing rural road infrastructure and lifting spot rates. Oil and Gas, Mining and Quarrying remains cyclical; adoption of dual-fuel LNG trucking in Minas Gerais and Pará is a hedge against diesel volatility. Construction logistics rides Novo PAC's pipeline of highway and rail jobs, supporting oversized cargo carriers and cement tanker utilization as the Brazil freight and logistics industry embraces specialized niches.

Courier, Express, and Parcel services are projected to grow at a CAGR of 5.42% from 2026-2031, a path that outpaces overall Brazil freight and logistics market growth. Domestic parcel flows still dominate, but international CEP is advancing at 5.60% CAGR (2026-2031) on the back of cross-border marketplaces adapting to new import tariff thresholds. High-volume lanes linking São Paulo, Paraná, and Rio Grande do Sul are moving toward automated sortation hubs and electric van fleets to contain urban delivery costs. Meanwhile, Freight Transport retains a 60.95% share in 2025 yet faces price pressure as shippers demand visibility and guaranteed transit times. Warehousing and Storage scales in parallel, with cold chain facilities booking a 4.53% CAGR (2026-2031), underpinning growth in pharmaceuticals and gourmet food e-commerce.

Technology-enabled freight forwarding is shifting to value-added orchestration. Sea and inland waterway freight forwarding still

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captures 73.60% of freight forwarding revenue, but electronics, healthcare, and fashion verticals are powering air freight forwarding's 4.49% CAGR (2026-2031). Platform-based forwarders now bundle customs brokerage and bonded warehousing, monetizing data analytics that forecast demand surges and vessel ETAs.

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

List of Companies Covered in this Report:

A.P. Moller - Maersk AMTrans Logistics Azul Cargo Braspress Transportes Urgentes CargoX Correios DC Logistics Brasil DHL Group DSV A/S (Including DB Schenker) FedEx Gafor SA JSL SA Kuehne+Nagel Loggi MRS Logistica Rumo Logistica Sequoia Logistica e Transportes TBL-Transportes Bertolini Ltda Tegma 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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