

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

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Report description:

Brazil Road Freight Transport Market Analysis

The Brazil road freight transport market is expected to grow from USD 45.07 billion in 2025 to USD 47.13 billion in 2026 and is forecast to reach USD 58.93 billion by 2031 at 4.58% CAGR over 2026-2031. Current expansion is underpinned by federal highway investments, rising agricultural output, and a pronounced shift toward digitalized logistics platforms that improve load matching, route planning, and fleet productivity. Freight operators able to secure biofuel-compliant tanker capacity, optimize backhauls along grain corridors, and cultivate technology partnerships are positioned to tap the widest profit pools. Meanwhile, the Port of Santos modernization program, together with concession-backed toll roads, is already trimming average transit times and lowering vehicle wear, which enhances service reliability for shippers. Persistent driver shortages, volatile diesel prices, and the European Union's impending Carbon Border Adjustment Mechanism (CBAM) push fleet owners to accelerate alternative-fuel adoption, data tracking, and cost-pass-through formulas. The Brazil road freight transport market further benefits from a steady uptick in same-day and next-day deliveries, which amplifies less-than-truckload (LTL) demand in Sao Paulo, Rio de Janeiro, and other major metropolitan areas. Finally, the convergence of public-sector capital expenditure and private concessionaires safeguards road quality on priority corridors, helping carriers mitigate the 82% share of routes that remain unpaved nationwide.

Brazil Road Freight Transport Market Trends and Insights

E-Commerce Boom Drives LTL Demand

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Brazilian online retail continues its multi-year climb, spurring a rapid rise in parcel volumes that require consolidation, segregation, and time-definite final-mile services. Urban facilities in Sao Paulo and Rio de Janeiro already process sharply higher shipment counts than legacy hub-and-spoke depots, rewarding carriers that invest in cross-docks close to consumer clusters. International players have committed multi-billion-real capital to local distribution networks, accelerating technology adoption for dynamic routing and shipment visibility. Increased consumer expectations around same-day delivery encourage traditional FTL fleets to diversify into shared-capacity models. Early LTL adopters benefit from premium pricing tied to speed and reliability, while digital marketplaces help balance loads, reduce empty kilometers, and optimize warehouse slots.

Federal Highway CAPEX 2023-27

A USD 27 billion concession program now under execution targets 13 freight-dense corridors that carry 60% of national road cargo. Sections already handed over to private operators recorded a 15% drop in transit times within the first operational year as resurfacing, lane duplication, and automated toll collection took effect. Predictable pavement quality and continuous maintenance shrink vehicle repair bills and incident rates, especially for equipment hauling heavy agricultural produce. Toll financing assures long-term upkeep, countering the historic stop-start pattern of federal road budgets. Carriers anchored near upgraded corridors capture direct fuel savings and indirect gains from higher equipment availability.

Volatile diesel price / ICMS tax shifts

Fuel expenses make up 35-40% of long-haul operating costs, and yearly price swings of 15% compel carriers to levy surcharges, eroding rate transparency for shippers. Disparate state-level ICMS taxes create arbitrage where fleets register in low-tax jurisdictions but predominantly run high-tax lanes, skewing competition. A pending national tax reform aims to unify rates, yet uncertainty around implementation timelines complicates budgeting and hedging. Smaller operators have limited access to futures contracts, prompting them to maintain older, less fuel-efficient vehicles that heighten emissions and maintenance outlays.

Other drivers and restraints analyzed in the detailed report include:

Expanding Agro and Manufacturing Output Biofuel Supply-Chain Tanker Surge 82% of Road Network Unpaved

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

Segment Analysis

Manufacturing accounted for a 41.12% share of the Brazil road freight transport market size in 2025, anchored by automotive clusters in Sao Paulo and Rio Grande do Sul. Consistent component inflows and finished-vehicle dispatches underpin multi-stop routes that maximize trailer utilization. The segment's growth benefits from near-shoring of machinery parts previously imported from Asia, which compresses lead times and drives just-in-time restocking needs. Plant expansions announced by global automakers through 2026 will strengthen demand for specialized out-of-gauge carriers and time-critical deliveries.

Wholesale and retail trade is projected to register the fastest 5.26% CAGR between 2026-2031, buoyed by rising middle-class consumption and proliferating urban fulfillment centers. Frequent, small-lot shipments push carriers to adopt pallet-wide vehicle bodies and lift-gate vans for curbside unloading. Retailers using inventory visibility systems now tender bids based on real-time capacity, shifting bargaining power toward agile fleets. Integration of reverse-logistics lanes for returns and refurbishment further differentiates service providers, driving higher revenue per loaded kilometer.

Domestic movements held 63.01% of the Brazil road freight transport market share in 2025, a reflection of the country's continental distances and consumption hubs clustered in the Southeast. Upgraded toll roads between Brasilia and Goiania have

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already trimmed door-to-door times by double digits, boosting carrier asset turns. Nationwide supermarket distribution networks favor milk-run routes that reduce dead-heading and balance urban and rural loads.

International freight is expected to climb at 5.34% CAGR between 2026-2031 as grain, meat, and manufactured goods move toward rapidly modernizing port complexes. Cross-border flows into Argentina and Paraguay also expand under streamlined Mercosur documentation. Multimodal corridors pairing truck and short-haul barge segments on the Parana River deepen service portfolios for integrators equipped with customs-bonded tractor-trailers. Fleet owners able to synchronize export peak seasons with import backhauls take a revenue-per-truck lead over point-to-point competitors.

FTL services retained 77.62% of the Brazil road freight transport market size in 2025 due to bulk commodities and large-volume industrial consignments. Modern tri-axle trailers hauling 48 metric-ton grain loads across Mato Grosso-to-Santos routes showcase the cost advantage of full-capacity dispatches. Digital weigh-station bypass programs cut idling and enforce axle-load compliance, bolstering carrier reputations among exporters.

LTL moves, growing 5.12% CAGR between 2026-2031, capitalize on parcel splintering in metropolitan areas and diversified factory outputs. Cloud-based transport-management systems cluster multiple shipper orders into a single vehicle run, lifting equipment utilization to levels that rival FTL profitability. Carriers operating both segments gain from mode shifting, assigning LTL boxes to FTL trailers for rural collection before de-consolidation at urban hubs.

The Brazil Road Freight Transport Market Report is Segmented by End User Industry (Manufacturing, and More), Destination (Domestic and International), Truckload Specification (FTL and LTL), Distance (Long Haul and Short Haul), Goods Configuration (Fluid Goods and Solid Goods), Temperature Control (Non-Temperature and Temperature Controlled), and by Containerization. The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

A.P. Moller - Maersk Braspress Transportes Urgentes DHL Group Expresso Nepomuceno Gafor SA HU Transporte Rodoviario HU Transporte Rodoviario JAS JSL SA Rangel Logistics Solutions Rodonaves Group Rohlig Logistics Seacon Logistics Tegma Gestao Logistica Tora Transportes Transben Transportes Transpanorama Transportes SA Transportes Bertolini Ltda Veloce Logistica VIX Logistics

Additional Benefits:

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

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