

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

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Report description:

Chile Freight And Logistics Market Analysis

The Chile freight and logistics market size in 2026 is estimated at USD 22.53 billion, growing from 2025 value of USD 21.42 billion with 2031 projections showing USD 29.01 billion, growing at 5.18% CAGR over 2026-2031. Current expansion reflects sustained commodities trade, e-commerce penetration, and Chile's key role in global lithium flows, which saw the country supply 65.3% of the United States' lithium-carbonate imports. Infrastructure modernization under the Chile sobre Rieles rail program, rising cold-chain requirements for agri-food and aquaculture exports, and large-scale data-center investments that demand specialized project-cargo solutions are further reinforcing growth momentum. At the same time, international logistics groups are deepening local footprints, prompting technology upgrades among domestic firms and spurring service diversification across road, rail, sea, air, and CEP networks.

Chile Freight And Logistics Market Trends and Insights

E-commerce Boom and Omnichannel Retailing

Chile's online retail sales continue to rise, motivating retailers to integrate store and digital channels under unified inventory systems that favor same-day delivery capabilities. Logistics providers are accelerating micro-fulfillment center deployment around Santiago to shorten urban delivery routes and cut costs. Red Movilidad's rollout of 300 electric buses highlights parallel investment in zero-emission urban fleets that can support parcel drop-off nodes. Fintech regulation underpins secure digital

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payments, boosting consumer trust and sustaining parcel volumes. As omnichannel maturity advances, demand intensifies for integrated warehousing, route-optimization software, and reverse-logistics solutions capable of processing higher return rates.

Chile Sobre Rieles Rail-Freight Upgrade Program

Public-sector commitment to the Chile sobre Rieles plan channels capital toward track rehabilitation, gauge standardization, and terminal modernization across the Santiago-Valparaiso spine. CRRC electro-diesel rolling stock orders illustrate technological renewal that will raise axle-load limits and allow double-stack container operations. Enhanced rail reliability should divert some bulk and container flows from road, trimming emissions and easing highway congestion. Intermodal interfaces near ports are being redesigned to facilitate seamless transfer between wagon and vessel, crucial for mineral exports. The program's medium-term completion horizon positions rail as a credible alternative for long-haul moves by 2028.

Trucking Cost Inflation and Driver Shortages

Diesel volatility and stricter labor regulations keep road-haulage operating costs elevated. Specialized certifications needed for hazardous-materials and heavy-equipment driving accentuate a talent gap in northern mining corridors, hampering copper and lithium flow continuity. Walmart Chile's pilot of green-hydrogen trucks illustrates attempts to hedge fuel risk, yet limited refueling infrastructure slows scaling. Wage inflation plus mandatory rest-period compliance compresses fleet utilization, nudging shippers toward intermodal solutions. Training programs supported by industry associations aim to replenish the driver pool but require time to yield impact. Until then, cost pass-through to freight rates remains probable.

Other drivers and restraints analyzed in the detailed report include:

Cold-Chain Demand From Agri-Food and Aquaculture Exports
Deep FTA Network Lowering Cross-Border Frictions
Port Berth Congestion at San Antonio and Valparaiso

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

Segment Analysis

Manufacturing accounted for 38.12% of 2025 revenue, a reflection of Chile's processed foods, mining equipment, and chemical output that demand complex inbound raw-material coordination and outbound export packaging. The Chile freight and logistics market size attached to Manufacturing is bolstered by ongoing plant automation and just-in-time inventory philosophies that lean on reliable transport schedules. Wholesale and Retail Trade, though smaller, exhibits a 5.67% CAGR (2026-2031) as modern supermarkets, fashion chains, and online marketplaces deepen penetration into secondary cities. Agriculture, Fishing, and Forestry keep freight volumes robust through fresh and frozen produce exports that rely on expanded reefer capacity. Oil, Gas, Mining, and Quarrying generate heavy lift and bulk-haulage requirements, although growth tempers as mature mines prioritize operational efficiency over expansion.

Moving forward, renewable-energy construction and green-hydrogen pilots expand project-cargo demand, while data-center rollouts stimulate high-value electronics logistics. This multi-sector tapestry reduces dependence on commodity cycles and stabilizes the aggregate Chile freight and logistics market.

Freight Transport held 62.88% of Chile's freight and logistics market share in 2025, underscoring the centrality of moving copper, lithium, and refrigerated produce from interior production clusters to seaports. The Chile freight and logistics market size associated with Freight Transport is forecast to grow in line with a 5.18% overall CAGR as infrastructure upgrades unlock higher payload capacities and lower unit costs. Digital freight-matching platforms and route-planning algorithms optimize backhaul loads,

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reducing empty-kilometer ratios. Meanwhile, CEP advances at a 6.01% CAGR (2026-2031), fuel demand for time-definite services, pushing carriers to deploy electric vans and autonomous parcel lockers inside urban zones. Warehousing and Freight Forwarding remain steady, leveraging Chile's FTA network to deliver integrated multimodal and customs-brokerage solutions.

Courier, Express, and Parcel operations exploit same-day niches by expanding pickup-drop-off point density. Freight Forwarding consolidates specialized competencies in project cargo and temperature-sensitive flows, while Other Services, including supply-chain consulting and reverse logistics, gain traction as shippers pursue cost visibility and sustainability metrics. This diversified mix positions the Chile freight and logistics market for resilience against sector-specific shocks.

The Chile 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:

Agencias Universales SA (AGUNSA) Andes Integracion Logistica Chilexpress Compania Sud Americana de Vapores SA (CSAV) DHL Group DSV A/S (Including DB Schenker) Empresas Copec SA (Including Blue Express) Empresas Taylor FedEx Ferrocarril del Pacifico SA GEODIS Kuehne+Nagel LATAM Cargo NYK (Nippon Yusen Kaisha) Line Ransa Redmegacentro SA (Including Megalogistica SpA and Mega Frio Chile SpA) Romeu SAAM Ultramar 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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