SCOTTS INTERNATIONAL

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

Market Report | 2026-02-09 | 150 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License $4750.00
- Team License (1-7 Users) $5250.00
- Site License $6500.00
- Corporate License $8750.00

Report description:

Chile Road Freight Transport Market Analysis

Chile Road Freight Transport Market size in 2026 is estimated at USD 11.37 billion, growing from 2025 value of USD 10.77 billion with 2031 projections showing USD 14.94 billion, growing at 5.61% CAGR over 2026-2031.

The country's 4,300-kilometer north-south spine, favorable Pacific-facing trade orientation, and mining-led export base collectively underpin steady demand for truck services. Nearshoring of automotive parts from neighboring Argentina and Brazil, rising e-commerce penetration, and public works such as the Ruta 5 North upgrade reinforce growth prospects, while toll inflation, driver shortages, and climate-related disruptions create operating headwinds. Multimodal corridor projects that connect Chilean ports with the Atlantic side of South America promise new long-haul volumes and stronger asset utilization for carriers. Technology adoption from digital freight matching to AI-enabled route planning continues to improve load factors and lower empty-mile ratios, especially for smaller fleets that dominate the fragmented competitive landscape.

Chile Road Freight Transport Market Trends and Insights

Rapid Expansion of Chilean E-commerce Sector

Online retail continues to reshape freight flows, with food-and-beverage web sales leaping 133% between 2020 and 2024 and maintaining double-digit growth into 2025. Smaller, more frequent consignments favor LTL and last-mile operators, especially in

Santiago where 34% of large food outlets are located. Digital payment localization drives order conversion and boosts shipment counts as 94% of Latin American consumers demand friction-free checkout. Retailers answer with omnichannel logistics investment, creating a larger addressable base for tech-savvy carriers that can orchestrate hub-and-spoke urban deliveries over distances often surpassing 500 kilometers between major Chilean cities.

Growing Demand from Lithium-Mining Supply Chains in the North

The National Lithium Strategy seeks an additional 300,000 LCE by 2030 via public-private partnerships such as the Codelco-SQM alliance. Bulk sulfuric acid, mineral reagents, heavy machinery, and outbound lithium carbonate must travel 1,400 kilometers from the Atacama to central ports, requiring specialized ADR-compliant tankers and robust fleet maintenance regimes to withstand desert extremes. Cochilco highlights 49 mining projects worth USD 65.71 billion slated for 2023-2032, ensuring sustained freight volumes for both construction inputs and outbound concentrates.

Driver Shortage and Aging Workforce

The International Road Transport Union warns global unfilled driver posts could double by 2028, and Chile mirrors this trend with dwindling interest among younger workers and female participation still below 6%. The 2024 labor reform that cuts the workweek to 40 hours strains scheduling flexibility and raises overtime costs, especially for lithium-route carriers working multi-day cycles. Mining operators finance shared rest facilities and training programs, yet industry surveys still flag a 34,000-head talent gap.

Other drivers and restraints analyzed in the detailed report include:

Government Highway Concession Upgrades (Ruta 5 & Bioceanic Corridor)Nearshoring of Automotive Parts Manufacturing from Argentina/BrazilRoad-Toll Inflation Outpacing Freight Rates

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

Segment Analysis

Manufacturing commanded 41.12% of the Chile road freight transport market share in 2025, thanks to sustained inflows of automotive parts and electronics under nearshoring deals. This dominance translates into stable FTL call-offs for just-in-time lines, while LTL opportunities arise from tier-2 suppliers delivering sub-assemblies. The Chile road freight transport market size attributable to wholesale and retail trade is smaller today but expands the fastest, mirroring the 5.85% CAGR projection driven by omnichannel grocery and Walmart's USD 1.3 billion warehouse spree.

Mining, oil, and quarrying freight remains a backbone segment, buoyed by 49 active projects with a USD 65.71 billion capex pipeline and the National Lithium Strategy's target of 300,000 LCE additional output. Agriculture adds significant seasonal elasticity; a single cherry harvest can boost container demand by 75%, forcing carriers to reposition reefers from central-southern orchards to San Antonio port under tight dwell-time windows. Construction volumes ebb and flow with infrastructure outlays-Ruta 5 upgrades alone inject more than seven million tons of aggregates and steel into the network through 2027.

Domestic lanes held 62.35% of the Chile road freight transport market in 2025, reflecting dense north-south trade along Ruta 5 between Santiago, Valparaiso, and Concepcion. Yet international volumes now record a 5.98% CAGR through 2031 as bioceanic projects near completion and landlocked Paraguay taps Pacific gateways to Asia. Cross-border hauls typically involve soybean, beef, and auto parts flowing west and containerized consumer goods heading east.

Cabotage limits hamper back-haul yields, but harmonized customs procedures under the corridor plan and expanded use of electronic consignment notes shorten border dwell times by up to 30 minutes per truck. Currency risk remains: peso volatility against the Brazilian real can swing cross-border trucking rates by 4-5 percentage points within a quarter, prompting carriers to hedge via USD-denominated contracts.

FTL represented 78.55% of the Chile road freight transport market size in 2025, supplying bulk copper, lithium, and agriculture. Mining consignors contract fixed-route FTL to mitigate hazardous-goods compliance complexity, which supports higher asset turns but leaves limited back-haul cargo. LTL expands at 5.74% CAGR as online retail proliferates, making multi-stop milk-runs viable in cities where e-delivery density exceeds 250 orders per square kilometer.

Digital brokers slice administrative time by combining rate benchmarking, e-bill-of-lading issuance, and automated proof-of-delivery flows, lowering entry barriers for small fleets. Higher touch-point LTL also drives demand for telematics, refrigerated micro-depots, and AI-based consolidation.

The Chile Road Freight Transport Market Report is Segmented by Destination (Domestic, and More), End-User Industry (Manufacturing, 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 (Non-Temperature Controlled, and More). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Andes Logistics de Chile S.A. Agunsa (Agencias Universales S.A.) Transportes Casablanca Transportes Nazar Sotraser Transportes Santa Maria MR Transport Jorquera Transporte SA Kuehne + Nagel DHL Supply Chain DSV CEVA Logistics Yusen Logistics Lamaignere JAS Worldwide LOGPAR Ducis Logistics Fracht Chile SpA South Pacific Logistics Cargoway Chile

Additional Benefits:

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

Table of Contents:

SCOTTS INTERNATIONAL

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

Market Report | 2026-02-09 | 150 pages | Mordor Intelligence

To place an Order with Scotts International:
- - Print this form
- - Complete the relevant blank fields and sign
- - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	$4750.00
	Team License (1-7 Users)	$5250.00
	Site License	$6500.00
	Corporate License	$8750.00
	VAT	
	Total	

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*		Phone*	
First Name*		Last Name*	
Job title*			
Company Name*		EU Vat / Tax ID / NIP number*	
Address*		City*	
Zip Code*		Country*	
		Date	2026-02-27
		Signature	

Scotts International. EU Vat number: PL 6772247784
tel. 0048 603 394 346 e-mail: support@scotts-international.com
www.scotts-international.com