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Chile Third-party Logistics (3PL) - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

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

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Report description:

Chile Third-party Logistics (3PL) Market Analysis

The Chile Third-party Logistics Market is expected to grow from USD 4.53 billion in 2025 to USD 4.72 billion in 2026 and is forecast to reach USD 5.81 billion by 2031 at 4.24% CAGR over 2026-2031.

Rising infrastructure spending, fast-growing e-commerce, and trade corridor initiatives jointly lift demand for third-party logistics services. Public-private concessions are adding new ports, rail links, and highways that lower door-to-door costs and shorten delivery times. At the same time, omnichannel retailers seek nationwide same-day fulfillment, prompting 3PL providers to expand warehouse footprints and route-optimization tools. Free-trade agreements widen export lanes for Chilean commodities, pushing International Transportation Management volumes higher, while near-shoring inflows raise specialized warehousing needs for parts and raw materials. Climate volatility and labor disruptions at key ports remain short-term hurdles, yet ongoing digital-trade facilitation keeps the long-range outlook positive.

Chile Third-party Logistics (3PL) Market Trends and Insights

Infrastructure build-out & public-private concessions drive capacity expansion

Chile's Directorate General of Concessions administers a USD 11 billion pipeline of road, rail, and port upgrades that widens transport capacity and trims transit times. The flagship USD 1.32 billion Valparaiso-Santiago freight rail will cut the port-to-capital trip by 40%, while the USD 2.3 billion San Antonio Outer Port is designed for 6 million TEUs a year. Faster corridors let 3PL firms design denser service networks, slash empty-haul ratios, and offer multimodal contracts to shippers seeking reliability. Streamlined permitting rules are shortening project approvals, bringing new capacity online earlier, and reinforcing Chile's Pacific gateway role.

E-commerce volume surge reshapes fulfillment strategies

Domestic e-commerce sales jumped 35% in 2024, forcing retailers to redesign inventory placement and last-mile routing. Same-day delivery promises in Santiago require micro-fulfillment centers close to buyers and real-time transport visibility solutions. 3PL providers now layer route-planning software with crowdsourced driver fleets, while parcel sorters introduce electric vans to lower urban emissions. Government support for electromobility, evidenced by 1,032 public charging points, underpins the move toward greener delivery fleets. These shifts deepen the demand for flexible warehousing contracts and data-driven transport management services.

Port congestion & customs complexity constrain throughput efficiency

A 48-hour labor stoppage at Valparaiso and Ventanas in April 2024 stranded exports worth USD 240 million, highlighting single-gateway vulnerability. Congested yards push vessel dwell times above five days during peak seasons. Simultaneously, Chile's detailed tariff system lacks a low-value de minimis threshold for commercial parcels, raising paperwork burdens for cross-border e-commerce. Modern single-window modules are now in the pilot stage, but full rollout is at least two years away. Until then, 3PL operators must maintain in-house customs desks and buffer stocks to offset clearance delays.

Other drivers and restraints analyzed in the detailed report include:

Bilateral trade agreements create multi-corridor opportunitiesCold-chain infrastructure upgrades support high-value exportsPolitical-economic uncertainty dampens investment confidence

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

Segment Analysis

Domestic Transportation Management held a 52.40% revenue share of the Chile 3PL market in 2025, reflecting the country's 4,270 km length and the need to move copper, food, and consumer goods across multiple climate zones. Long-haul truck operators rely on sectional relay models that cut driver downtime and preserve cold-chain integrity. The Chile 3PL market size for International Transportation Management is set to post a 4.18% CAGR through 2031, powered by export diversification into Asia and the planned Bioceanic rail-road network. Supply-chain visibility platforms integrating port call data and border-crossing APIs give providers a competitive edge in both segments.

Value-added warehousing is evolving toward robotics-enabled high-bay sites that can pick 1,000 lines per hour, meeting omnichannel performance objectives. For remote mining camps, cross-dock nodes near Antofagasta cut replenishment latency and leave only the last rugged leg for specialized heavy-lift carriers. Across services, automated billing and carbon-footprint dashboards are now standard contract requirements, steering providers toward cloud-native TMS and WMS solutions for real-time insights.

The Chile Third-Party Logistics Report is Segmented by Service (Domestic Transportation Management, International Transportation Management, and More), by End User (Automotive, Energy & Utilities, Manufacturing, Life Sciences & Healthcare, Technology & Electronics, and More), and by Logistics Model (Asset-Light, Asset-Heavy, Hybrid). The Market Forecasts are

Provided in Terms of Value (USD).

List of Companies Covered in this Report:

AGUNSA DHL Group Andes Logistics DSV A/S (incl. Agility Logistics) Sitrans Servicios Integrados de Transportes Loginsa Noatum Logistics CEVA Logistics Blue Express Mercado Libre (Mercado Envios) Kuehne + Nagel FedEx Logistics United Parcel Service, Inc. ID Logistics GXO Logistics Ransa Logistics ChileTrans Logistics Rhenus Logistics Megalogistica Latam Logistics

Additional Benefits:

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

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