

South & Central America Contract Logistics Market Size and Forecast (2021 - 2031), Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Type (Outsourcing and Insourcing), Service Type (Warehousing and Distribution, Transportation Management, Aftermarket Logistics, and Others), and Industry Vertical (Retail and E-commerce, Automotive, Industrial and Manufacturing, Pharma and Healthcare, Consumer Goods and Electronics, Aerospace and Defense, and Others)

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Abstracts

The South and Central America Contract Logistics Market is poised for significant growth, with projections indicating an increase from US\$ 19,894.2 million in 2024 to US\$ 27,361.9 million by 2031. This growth trajectory reflects a compound annual growth rate (CAGR) of 4.9% from 2025 to 2031. The market's expansion is primarily fueled by escalating trade activities, the rapid rise of e-commerce, and substantial infrastructure investments across the region.

Key economies such as Brazil, Mexico, Argentina, and Chile are at the forefront of this growth, benefiting from their robust industrial bases and expanding manufacturing sectors. In Brazil, the government has launched the ambitious PAC Infrastructure Plan, which allocates approximately US\$ 200 billion towards transportation and urban development projects. This initiative aims to enhance logistics efficiency through road rehabilitation and port modernization, ultimately reducing logistics costs. Additionally, the World Bank's approval of a US\$ 200 million loan in April 2025 for infrastructure upgrades in Bahia state is expected to focus on climate-resilient roads and the adoption

of electric vehicles, further improving supply chain operations in the region. Brazil's agricultural sector is also seeing significant investments, with around US\$ 950 million earmarked for crop transportation logistics and the development of agro corridors in 2024. This investment reflects a concerted effort to optimize contract logistics within agricultural supply chains. Meanwhile, Chile is making substantial investments in port modernization to facilitate faster and more reliable movement of goods, while Argentina is enhancing its transportation network to streamline logistics operations between 2023 and 2025. In Colombia, the ongoing construction of the Toyo Tunnel, expected to be completed by 2027, will significantly improve road connectivity and logistics efficiency in the region.

The South and Central America Contract Logistics Market can be segmented by type, service type, and industry vertical. In terms of type, the market is divided into Outsourcing and Insourcing, with Outsourcing holding the largest market share in 2024. By service type, the market includes Warehousing and Distribution, Transportation Management, Aftermarket Logistics, and others, with Warehousing and Distribution leading in market share. When segmented by industry vertical, Retail and E-commerce dominate, followed by Automotive, Industrial and Manufacturing, Pharma and Healthcare, Consumer Goods and Electronics, Aerospace and Defense, among others. Looking ahead, the integration of artificial intelligence (AI) and advanced analytics is set to transform the contract logistics landscape. These technologies are enhancing operational efficiency by optimizing complex supply chains and improving decision-making processes. AI systems can analyze vast datasets in real-time, enabling predictive analytics that anticipate demand fluctuations, optimize delivery routes, and reduce delivery times. This results in lower operational costs and improved customer satisfaction. For instance, machine learning algorithms can forecast peak demand periods, allowing logistics providers to allocate resources more effectively. Moreover, advanced analytics improve inventory management through precise forecasting and automated replenishment, minimizing stockouts and excess inventory. The use of AI-driven automation in warehouses, including robotics and automated guided vehicles, streamlines order fulfillment and reduces human error. The combination of AI with Internet of Things (IoT) devices offers enhanced visibility across the supply chain, improving risk management by enabling early detection of disruptions and facilitating quicker responses. This technological synergy allows contract logistics providers to offer more flexible, scalable, and customized solutions tailored to diverse industry needs. Overall, AI and advanced analytics are revolutionizing contract logistics, driving operational efficiency, accuracy, and responsiveness, while supporting sustainable growth by reducing costs and enhancing service quality.

Country-wise, Brazil is the largest player in the South and Central America Contract

Logistics Market, driven by its large consumer base and booming e-commerce sector. For example, MercadoLibre's announcement of a US\$ 5.8 billion investment in Brazil in April 2025 focuses on logistics and technology to support its growth. The complexity of Brazil's geography and infrastructure challenges has led to increased demand for outsourced logistics services, including warehousing and transportation. Government initiatives, such as the Novo PAC program and various infrastructure projects, further bolster logistics expansion in Brazil.

Key players in the South and Central America Contract Logistics Market include GEODIS SA, United Parcel Service Inc, Kuehne + Nagel International AG, Nippon Express Co Ltd, DSV AS, FedEx Corp, Ryder System Inc, CMA CGM SA, GXO Logistics Inc, and Deutsche Post AG. These companies are employing strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence and offer innovative solutions to their customers.

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