

South America Contract Logistics Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> ****Industry:**** Third-Party & Contract Logistics (3PL/4PL) (Logistics & Supply Chain)

> ****Source:**** <https://www.mordorintelligence.com/industry-reports/south-america-contract-logistics-market>

> ****Scraped Date:**** 2026-09-17

Executive Market Summary

Market Metric	Details
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Base Market Size	USD 15.24 billion
Projected Forecast (2031)	USD 15.24 billion
Growth Rate (CAGR)	4.63 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

![Major players in South America Contract Logistics industry](images/chart_2.png)

![South America Contract Logistics Market Summary](images/chart_3.png)

![South America Contract Logistics Market: Market Share by Service](images/chart_4.png)

![South America Contract Logistics Market: Market Share by End-User](images/chart_5.png)

![South America Contract Logistics Market](images/chart_6.png)

![Icon](images/chart_7.png)

![footer background image](images/chart_9.png)

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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market Overview

Study Period | 2020 - 2031 |

Forecast Data Period | 2026 - 2031 |

Base Year Market Size (2025) | USD 14.51 Billion |

Market Size (2026) | USD 15.24 Billion |

Market Size (2031) | USD 19.11 Billion |

Growth Rate (2026 - 2031) | 4.63 % |

Market Concentration | Medium |
Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

South America Contract Logistics Market Analysis by Mordor IntelligenceThe South America contract logistics market size was valued at USD 14.51 billion in 2025 and estimated to grow from USD 15.24 billion in 2026 to reach USD 19.11 billion by 2031, at a CAGR of 4.63% during the forecast period (2026-2031).

E-commerce fulfillment, near-shoring of automotive assembly, and cold-chain mandates are reshaping service portfolios, while multiyear, dollar-denominated contracts hedge currency swings and underpin the rapid build-out of high-throughput, technology-enabled distribution centers. Brazilian platform operators turned logistics into a competitive moat through owned infrastructure, and their investment signals are echoed across Colombia, Peru, and Chile, where new deep-water ports and cold stores are already attracting value-added services. Competitive intensity is elevating as global integrators collide with domestic specialists that command dense last-mile networks, forcing margin protection through automation, fleet electrification, and micro-fulfillment expansion. Headline challenges remain: congested ports, manual customs regimes, and a widening shortage of warehouse labor add friction costs that can erode the region's cost advantage, yet infrastructure programs, tariff reductions under the EU-Mercosur accord, and strong consumer demand continue to offset these risks.

Key Report Takeaways

- * By service, transportation services led with 62.87% of the South America contract logistics market share in 2025, value-added services are projected to expand at a 6.18% CAGR through 2031, the fastest pace of any service line.
- * By contract duration, contracts exceeding three years held 57% of the South America contract logistics market size in 2025 and are advancing at a 5.64% CAGR to 2031.
- * By end-user, manufacturing and automotive captured 27.11% of 2025 demand, while healthcare and pharmaceuticals are forecast to post a 6.33% CAGR to 2031.
- * By country, Brazil accounted for 48.21% of the South America contract logistics market size in 2025, whereas Colombia is expected to record the highest national CAGR at 6.09% over 2026-2031.

Key Market Trends

South America Contract Logistics Market Trends and InsightsDrivers Impact Analysis*

Driver (~) (%) Impact on CAGR Forecast Geographic Relevance Impact Timeline
E-commerce boom and same or next-day fulfillment demand +1.2% Brazil, Argentina, Chile, and Colombia urban corridors Short term (≤ 2 years)
Automotive production and export growth +0.9% Brazil, Argentina, Colombia Medium term (2-4 years)
Infrastructure modernization programs +0.7% Chile, Peru, Brazil Long term (≥ 4 years)
Near-shoring of North American and EU supply chains +0.8% Brazil, Colombia Medium term (2-4 years)
Cold-chain needs for agri-food and vaccines +0.6% Brazil, Chile, Colombia Medium term (2-4 years)
Pay-as-you-go 3PL micro-fulfillment in secondary cities +0.4% Argentina, Brazil, Colombia Short term (≤ 2 years)

Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

The top five providers hold roughly 35-40% combined revenue, placing the South America contract logistics market in a moderately fragmented state. JSL's BRL 9.6 billion (USD 1.72 billion) revenue, plus recent acquisitions of TPC and FSJ, consolidate automotive and pharmaceutical capacity, while its network of 65 sites gives it reach into secondary Brazilian cities. DHL pursues a hub-and-spoke model anchored by the new Jundiaí mega-hub and fleet electrification, targeting 30% volume growth by end-2026. CEVA aims for 620,000 square meters by 2028, supported by quick-build Amazon projects that showcase accelerated construction techniques[4]DHL Brazil, "Press Releases," dhl.com.

Technology differentiators surge: Correo Argentino's fully robotic hub processes 9,000 parcels per hour, trimming labor costs up to 50%, and iFlow adopted a cloud WMS that cut order cycle time 25%. Cold-chain specialists like Emergent Cold and Multilog leverage GDP compliance to maintain double-digit margins, while micro-fulfillment challengers capture SMEs through pay-as-you-go pricing in secondary cities.

South America Contract Logistics Industry Leaders* DHL Supply Chain

* Kuehne + Nagel International AG

* DSV A/S

* UPS

* Expeditors

* *Disclaimer: Major Players sorted in no particular order

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Component Component 3 Scope Of The Report Bottom

South America Contract Logistics Market Report ScopeBy Service TypeTransportation | Road |
| Rail |
| Air |
| Sea |

Warehousing & Distribution |

Value-added Services (Assembly, Labelling, Kitting) |

Segmentation Accordion Item

By CountryBrazil |

Argentina |

Chile |

Colombia |

Peru |

Rest of South America |

Frequently Asked Questions

How large will South American contract logistics spending be by 2031?

The South America contract logistics market is projected to reach USD 19.11 billion by 2031, up from USD 15.24 billion in 2026.

Which service line grows fastest?

Value-added services, led by kitting and labeling, are forecast to grow at a 6.18% CAGR over 2026-2031.

Why are multiyear logistics contracts common in Brazil?

Shippers favor contracts longer than three years because fixed dollar-denominated rates hedge local currency volatility and high policy interest rates.

Which country shows the highest growth potential?

Colombia is expected to post a 6.09% CAGR to 2031, lifted by new port capacity at Puerto Antioquia and other infrastructure upgrades.

What limits market growth in the near term?

Port congestion, manual customs processes, exchange-rate swings, and skilled labor shortages collectively subtract up to 0.8 percentage points from forecast CAGR.

How are providers addressing last-mile speed?

Operators invest in micro-fulfillment centers inside secondary cities, deploy autonomous mobile robots, and electrify vehicle fleets to accelerate urban delivery.