



# Trailer and Cargo Container Tracking

13th Edition

*Trailer and Cargo Container Tracking is the thirteenth consecutive report from Berg Insight analysing the latest developments on the trailer and cargo container tracking market worldwide. This strategic research report from Berg Insight provides you with 260 pages of unique business intelligence including 5-year industry forecasts and expert commentary on which to base your business decisions.*

# The installed base of connected trailers and cargo containers to reach 27 million by 2029

Cargo and cargo carrying unit tracking aims to increase operational efficiency and visibility in transport chains. Berg Insight's definition of a real-time tracking solution is a system that at a minimum incorporates data logging, satellite positioning and data communications to a backoffice application through cellular, satellite or LPWA networks. The tracking device can be designed to track the cargo carrying unit, i.e. the trailer, intermodal container, rail freight wagon, air freight ULD, pallet or other returnable transport packaging (RTP), or the cargo itself. Tracking devices for cargo carrying units are permanently or temporarily installed while cargo tracking devices are typically placed with the cargo or attached to the cargo box during transport. Real-time data on the location and status of cargo carrying units and cargo empowers the various stakeholders in the supply chain to make better-informed decisions, increase asset utilisation, reduce costs and minimise environmental impact.

Berg Insight estimates that shipments of remote tracking systems with cellular, satellite, LoRa and Sigfox communications capabilities for cargo carrying units reached 4.4 million units worldwide in 2024. Growing at a compound annual growth rate (CAGR) of 10.3 percent, shipments are expected to reach 7.2 million units in 2029. During the same period, the installed base of tracking devices is forecasted to grow at a compound annual growth rate of 14.3 percent from 13.8 million units at the end of 2024 to 26.9 million units by 2029.

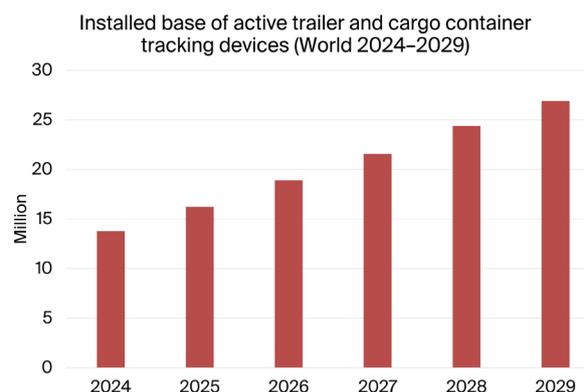
In terms of the number of installed units, trailer tracking is the largest market segment, estimated to account for 43 percent of the total installed base of tracking devices in 2024. Intermodal container tracking is the second largest segment, accounting for 41 percent of the total installed base. The number of tracking devices installed on rail freight wagons, air freight ULDs and pallets and other RTPs is substantially smaller. The market for tracking devices and real-time data loggers used for general cargo applications is set for rapid growth in the next few years as prices are expected to decrease and smart labels and other devices with a very small footprint are being introduced. The number of active devices in use is forecasted to grow from 4.9 million devices in 2024 to 16.2 million devices at the end of 2029. Yearly device shipments in this category will grow from 7.1 million units in 2024 to reach 36.5 million units in 2029. Total revenues for tracking solutions for cargo carrying units and cargo reached € 2.7 billion in 2024. Growing at a CAGR of 10.8 percent, the total market value is forecasted to reach € 4.5 billion in 2029.

A wide range of companies provides tracking solutions for trailers, containers, rail freight wagons, ULDs, pallets and other RTPs and cargo. Most companies specialise in one application, e.g. trailer tracking but have devices installed on several different asset types due to customer requirements. In terms of the number of deployed tracking devices, Berg Insight ranks ORBCOMM as the largest provider, having a

significant installed base of both trailers and containers. ORBCOMM's total installed base reached 2.1 million units at the end of 2024. Nexxiot and SkyBitz are the second and third largest players. Nexxiot has large installed bases of both containers and rail freight wagons while SkyBitz has the vast majority of its installed base on trailers. Additional leading providers of trailer telematics solutions are Spireon, Samsara, BlackBerry, CalAmp, Motive, Idem Telematics, Powerfleet, Phillips Connect, Schmitz Cargobull, FleetPulse, Clariance Technologies, SCALAR, TGI, EROAD, Axscend, AddSecure and Krone.

Maersk has equipped its entire fleet of 360,000 reefer containers with tracking devices. Other major players in the container tracking segment are ZillionSource, Envotech, Globe Tracker, Traxens, Giesecke+Devrient, BoxPlus, Sensolus, Geoforce and Copeland. In addition to Nexxiot, leading telematics players in the rail industry are DOT Telematik and Systemtechnik, Amsted Rail, Siemens, SAVVY Telematic Systems and Intermodal Telematics. Sensitech, DeltaTrak, Tive, Controlant, Decklar (formerly Roambee), Frigga, Copeland and OnAsset Intelligence are the leading providers of cargo tracking devices. Sensos and Trackonomy are also part of this segment, offering smart label solutions. Many cargo tracking players offer devices that can be used on all modes of transport, including air shipments.

Berg Insight anticipates that the ongoing trend in the transport industry to invest in new digital solutions that increase supply chain visibility and security will continue and even accelerate in the next few years. Falling hardware prices, wider availability of low-power cellular networks (LTE-M/NB-IoT) and satellite networks, together with more flexible subscription-based software models, are removing traditional barriers to adoption across fleet sizes and geographies. As solution providers deliver more cost-effective solutions that provide richer shipment, cargo and asset data, fleet operators and logistics service providers will become increasingly willing to invest in tracking systems.



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## Glossary

## Highlights from the report

Insights from 30 new executive interviews with market leading companies.

**Comprehensive overview** of the real-time cargo tracking value chain and key applications.

**In-depth analysis** of market trends and key developments.

**Summary** of the major cargo container tracking projects worldwide.

**Updated profiles** of 112 cargo container tracking solution providers.

**Detailed forecasts** by market vertical lasting until 2029.

**The latest trends** on trailer, intermodal container, rail freight wagon, air cargo container, cargo box, pallet and returnable transport packaging (RTP) tracking.

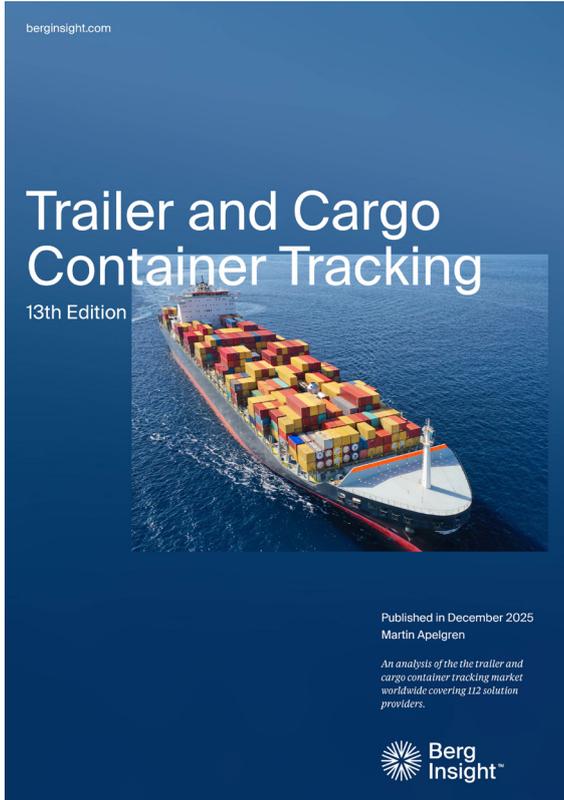
## This report answers the following questions

- Which are the leading providers of trailer and cargo container tracking solutions?
- What offerings are available from device vendors and service providers?
- What impact will international regulations and security initiatives have on the market?
- What are the key drivers behind the adoption of cargo tracking devices?
- What are the recent merger and acquisition activities on this market?
- What impact will technology advancements have on the market?
- How will the cargo tracking industry evolve?
- What are the future trends on this market?



## About Berg Insight's IoT market research

Our market reports offer comprehensive information and analysis on key IoT technologies and markets, addressing important concerns including total addressable market, market penetration, market shares, industry landscape, regulatory environment, market trends and forecasts. Our research portfolio today comprises more than 80 items, where each market report focuses on a specific vertical application area or cover horizontal themes. All market reports come with complementary data sets in Excel format that can be easily analysed and converted into tables and charts. We offer a range of different license options together with bundled packages and subscriptions to suit your specific needs.



TRANSPORT & LOGISTICS

# Trailer and Cargo Container Tracking

This study investigates the market for tracking and security of intermodal shipping containers, trailers, swap bodies, rail freight wagons, air freight unit load devices, pallets, RTPs and cargo boxes. The total market value for tracking solutions covering all these use cases is forecasted to grow at a CAGR of 10.8 percent from € 2.7 billion in 2024 to € 4.5 billion by 2029. Get up to date with the latest information about vendors, products and markets.

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## Who should read this report?

Trailer and Cargo Container Tracking is the foremost source of information about the adoption of tracking solutions for trailers and cargo containers. Whether you are a tracking solution provider, device vendor, cargo transportation stakeholder, telecom operator, investor, consultant, or government agency, you will gain valuable insights from our in-depth research.

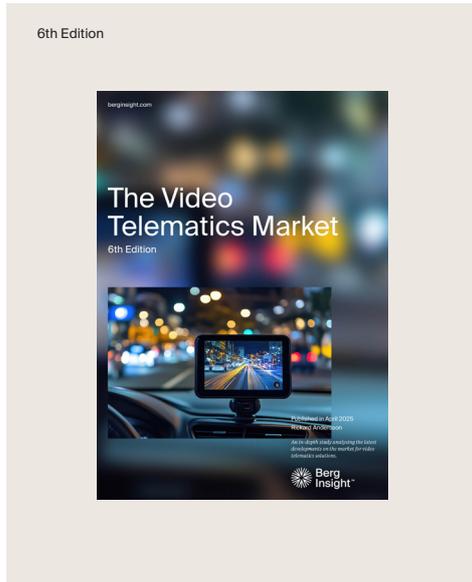
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