



The Global Construction Equipment OEM Telematics Market

8th Edition

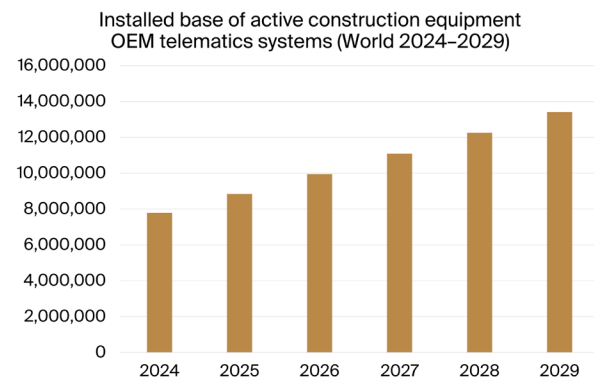
The Global Construction Equipment OEM Telematics Market is the eighth consecutive report from Berg Insight analysing the latest developments on the market for OEM-provided construction equipment telematics systems. This strategic research report from Berg Insight provides you with 160 pages of unique business intelligence including 5-year industry forecasts and expert commentary on which to base your business decisions.

Berg Insight forecasts 13.4 million active construction equipment OEM telematics systems by 2029

Berg Insight has found that the global installed base of active construction equipment OEM telematics systems reached 7.8 million units in 2024. Growing at a compound annual growth rate (CAGR) of 11.5 percent, the active installed base is forecasted to reach 13.4 million units worldwide in 2029. This includes all CE telematics systems marketed by construction equipment OEMs, either developed in-house or provided by the CE manufacturers in partnership with third-party telematics players. The European market accounted for around 1.1 million active construction equipment OEM telematics systems at the end of 2024. The North American market is estimated to be somewhat larger than the European. The Rest of World moreover represents more than half of the global installed base of CE telematics systems provided by construction equipment OEMs.

Most major construction equipment OEMs have introduced telematics offerings for their customers either independently or in collaboration with telematics partners. OEM telematics systems are today commonly factory-installed as standard at least for heavier machines and increasingly also for compact equipment. Berg Insight ranks Caterpillar as the leading construction equipment OEM in terms of the number of CE telematics systems deployed worldwide. Caterpillar – which is also by far the leading construction equipment manufacturer by market share – has well over 1 million connected assets in the construction equipment segment specifically. Based in the US, Caterpillar's largest markets for its telematics offerings are North America and Europe. The runners-up are SANY and Komatsu based in China and Japan respectively,

both major players on the respective domestic markets. Komatsu also has relatively large shares of its telematics units in North America, China and Europe. Other major players with several hundred thousand active CE telematics units include Sweden-based Volvo Construction Equipment, XCMG and Zoomlion in China, JCB headquartered in the UK and Japan-based Hitachi Construction Machinery. The remaining top-10 players are Deere & Company and Doosan Bobcat, while companies just outside of the top list moreover include HD Hyundai (HD Hyundai Construction Equipment and HD Hyundai Infracore) and Yanmar. Kobelco, Kubota and JLG Industries also have sizeable installed bases of connected equipment. Additional players having estimated installed bases of construction equipment telematics units in the tens of thousands include Terex, Liebherr, CNH Industrial, LiuGong, Tadano and BOMAG.



Highlights from the report

Insights from numerous interviews with market-leading companies.

New data on construction equipment sales and market shares.

Comprehensive overview of the construction equipment telematics value chain and key applications.

In-depth analysis of market trends and key developments.

Updated profiles of 29 construction equipment OEMs and their telematics offerings.

Market forecasts by region lasting until 2029.

Table of contents

Executive Summary

1 Construction Equipment Telematics Solutions

- 1.1 Introduction to CE telematics
- 1.2 CE telematics infrastructure
 - 1.2.1 CE segment
 - 1.2.2 GNSS segment
 - 1.2.3 Network segment
 - 1.2.4 Backoffice segment
 - 1.2.5 OEM/dealer segment
- 1.3 Construction equipment management
 - 1.3.1 Machine location tracking and status monitoring
 - 1.3.2 Security tracking and intervention
 - 1.3.3 Remote diagnostics, preventive maintenance and machine health prognostics
- 1.4 Equipment operator management
 - 1.4.1 Collection of operator-related data
 - 1.4.2 Interaction with operators in the field
 - 1.4.3 Video-based operator monitoring
- 1.5 Worksite management
 - 1.5.1 Worksite optimisation and site reporting
 - 1.5.2 Tracking of accessories, tools and other low-value items
 - 1.5.3 Integration with auxiliary systems
- 1.6 Business models

2 Market Forecasts and Trends

- 2.1 Market analysis
 - 2.1.1 The global construction equipment market

- 2.1.2 The installed base of construction equipment OEM telematics systems
- 2.1.3 Construction equipment OEM telematics vendor market shares
- 2.1.4 Variations on the global CE telematics market
- 2.2 Market drivers and barriers
 - 2.2.1 Macroeconomic environment
 - 2.2.2 Regulatory environment
 - 2.2.3 Competitive environment
 - 2.2.4 Technology environment
- 2.3 Value chain analysis
 - 2.3.1 Construction equipment industry players
 - 2.3.2 Telematics industry players
 - 2.3.3 Telecom industry players
 - 2.3.4 IT industry players
- 2.4 Future industry trends

- 3.1.2.3 JLG Industries
- 3.1.2.4 Kobelco
- 3.1.2.5 Kubota
- 3.1.2.6 Link-Belt Cranes and LBX (Sumitomo)
- 3.1.2.7 LiuGong
- 3.1.2.8 Mahindra & Mahindra
- 3.1.2.9 Manitowoc
- 3.1.2.10 Mecalac
- 3.1.2.11 SANY
- 3.1.2.12 Tadano
- 3.1.2.13 Takeuchi
- 3.1.2.14 Terex
- 3.1.2.15 Wacker Neuson
- 3.1.2.16 XCMG
- 3.1.2.17 Yanmar
- 3.1.2.18 Zoomlion

3 Company Profiles

- 3.1 Caterpillar
- 3.2 CNH Industrial
- 3.3 Deere & Company
- 3.4 Doosan Bobcat
- 3.5 HD Hyundai Construction Equipment
- 3.6 HD Hyundai Infracore
- 3.7 Hitachi Construction Machinery
- 3.8 JCB
- 3.9 Komatsu
- 3.10 Liebherr
- 3.11 Volvo Construction Equipment
- 3.12 Other construction equipment OEMs
 - 3.12.1 Bell Equipment
 - 3.12.2 BOMAG

Glossary

This report answers the following questions

- Which are the main telematics systems offered by construction equipment manufacturers?
- Which are the key construction equipment telematics applications?
- What business models are used by OEMs offering telematics?
- Which CE manufacturers have developed their telematics offerings in-house?
- Which OEM telematics offerings are powered by telematics partners?
- Are there regional variations on the global market for construction equipment telematics?
- How will the construction equipment OEM telematics market evolve in the future?



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

The Global Construction Equipment OEM Telematics Market

PUBLISHED DATE

December 2025

AUTHOR

Rickard Andersson

PDF & EXCEL: 1 user license

€1 500

PDF & EXCEL: 2-10 user license

€2 250

PDF & EXCEL: Enterprise license

€3 000

[Read more and place order on berginsight.com](#)



Who should read this report?

The Global Construction Equipment OEM Telematics Market is the foremost source of information about the market for OEM-provided construction equipment telematics systems. Whether you are an equipment manufacturer, telematics vendor, telecom operator, investor, consultant, or government agency, you will gain valuable insights from our in-depth research.

AUTHOR

Rickard Andersson

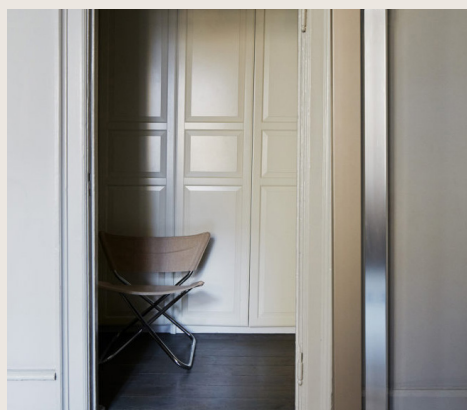


Rickard is a principal analyst with more than 15 years' experience in market research and advisory in the commercial telematics industry. His key areas of expertise include on-road and off-road fleet telematics including video telematics. Rickard has published research on various telematics topics including fleet management and asset management systems for diverse vehicle and asset types ranging from heavy trucks and light commercial vehicles to construction machinery and airport ground support equipment. Rickard joined Berg Insight in 2010 and holds a Master's degree in Industrial Engineering and Management from Chalmers University of Technology.

CONTACT

Berg Insight AB
 Viktoriagatan 3
 411 25 Gothenburg
 Sweden

+46 (0)31 711 30 91
 info@berginsight.com
 www.berginsight.com



Berg Insight offers premier business intelligence to the telecom industry. We produce concise reports providing key facts and strategic insights about pivotal developments in our focus areas. Berg Insight also offers detailed market forecast databases and advisory services. Our vision is to be the most valuable source of intelligence for our customers.