



# Trailer and Cargo Container Tracking

9th edition

*Trailer and Cargo Container Tracking is the ninth 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 270 pages of unique business intelligence including 5-year industry forecasts and expert commentary on which to base your business decisions.*

# The installed base of active cargo tracking units reached 9.3 million in 2020

Trailer and cargo container tracking is a subsegment of asset tracking and aims to increase operational efficiency and make logistics chains more secure. Berg Insight's definition of a real-time tracking solution is a system that incorporates data logging, satellite positioning and data communications to a backoffice application. Trailer tracking can be part of fleet management solutions including both trucks and trailers. The history of fleet management solutions goes back several decades while tracking and monitoring of shipping containers came in focus after 9/11. Today, mobile and satellite networks can provide ubiquitous online connectivity at a reasonable cost and mobile computing and sensor technology delivers high performance as well as excellent usability. All of these components combined enable the delivery of supply chain management, security management and operations management applications linking trailers, containers, cargo and enterprise IT systems.

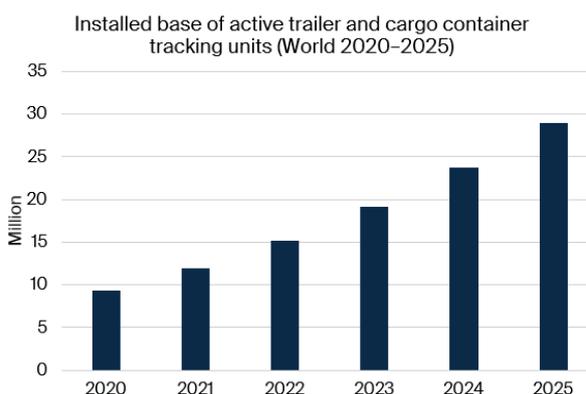
In order to make freight transport efficient, products are packed into collective logistics units which can remain intact throughout the delivery chain. Smaller logistics units such as boxes and pallets are often grouped into larger units and loaded on trailers, swap bodies, rail freight wagons, air freight unit load devices (ULDs) or intermodal shipping containers. These loading units can be applicable to one or more modes of transport. Trailers and semi-trailers are mostly used in road transport, swap bodies can be transferred between road and rail transport, rail freight wagons are used on railways, ULDs are used in air freight transport and intermodal shipping containers can be carried on several transport modes. More than 25 million intermodal containers, 14 million trailers and 5 million rail cars are in use worldwide.

Berg Insight estimates that shipments of remote tracking systems with cellular or satellite communications capabilities for cargo loading units including trailers, intermodal containers, rail freight wagons, air freight cargo containers, cargo boxes and pallets reached 3.8 million units worldwide in 2020. Growing at a compound annual growth rate of 27.6 percent, shipments are expected to reach 12.7 million units in 2025. During the same period, the installed base of remote tracking systems is forecasted to grow at a compound annual growth rate of 25.3 percent from 9.3 million units at the end of 2020 to 28.9 million units by 2025. Trailer tracking is the largest market segment, estimated to account for 34.4 percent of the total installed base of tracking units deployed on trailers and cargo containers in 2020. General cargo tracking and intermodal container tracking are the second and third largest segments with estimated shares of 30.0 percent and 24.8 percent respectively of the total installed base at the end of 2020.

Berg Insight ranks ORBCOMM as the largest provider of tracking solutions for cargo loading units, having a significant

installed base of trailers as well as containers. The company's total installed base reached more than 700,000 units at the end of 2020. The second largest player, SkyBitz, has an installed base of more than 600,000 tracking units, primarily on trailers. Additional large players on the North American trailer telematics market are Spireon and CalAmp, having between 100,000–400,000 installed tracking units each, as well as PowerFleet, Samsara and Omnitrac in the 50,000–100,000 range. The European trailer telematics market is considerably smaller. Idem Telematics is the leading player with close to 80,000 active units while other top European players include Schmitz Cargobull, Transics/WABCO and Novacom Europe, having between 30,000–60,000 active trailer units each. Mecomo and Agheera, also based in Europe, are strong vendors in the adjacent swap body segment. Maersk Line, Envotech, Traxens and ZillionSource all have installed bases above 100,000 units, primarily on intermodal containers. Nexxiot, Amsted Rail, Siemens, SAVVY, DOT Telematik and Cargomon Systems are significant vendors of tracking solutions for rail freight wagons. Sensitech, Tive, Roambee, OnAsset and Controlant are major players in the general cargo and air freight segment, with more than 100,000 active units each.

Berg Insight anticipates that there will be a strong focus on increased supply chain visibility and transport security in the coming years. The global COVID-19 pandemic and semiconductor chip shortage have accentuated the need for real-time data on shipment location and condition. Technology advancements in recent years have enabled additional data on trailer and container systems as well as cargo load status to be captured, adding value to fleet owners, shippers and transporters. Decreasing hardware costs, improved battery life and the emergence of LPWA technologies are furthermore expected to enable widespread adoption of cargo tracking solutions across various industry verticals in the coming years.



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## 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 major cargo tracking initiatives from the EU and the US.

**Updated profiles** of 102 cargo container tracking solution providers.

**Detailed forecasts** by market vertical lasting until 2025.

**The latest trends** on trailer, intermodal container, rail freight wagon, air cargo container, cargo box and pallet tracking.

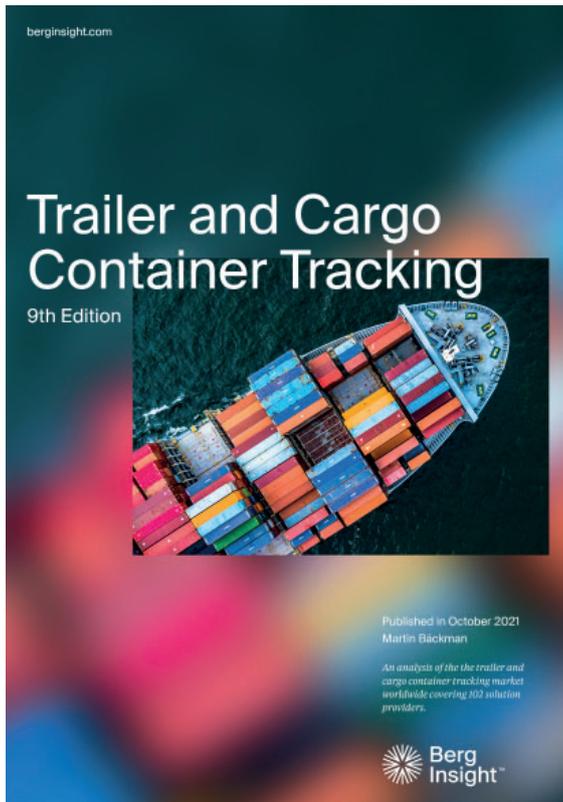
## This report answers the following questions

- 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 telematics 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 50 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 &amp; 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, cargo boxes and pallets. The installed base of remote tracking systems for these cargo loading units is forecasted to grow at a compound annual growth rate of 25.3 percent from 9.3 million units at the end of 2020 to 28.9 million units by 2025. Get up to date with the latest information about vendors, products and markets.

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## Who should buy 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.

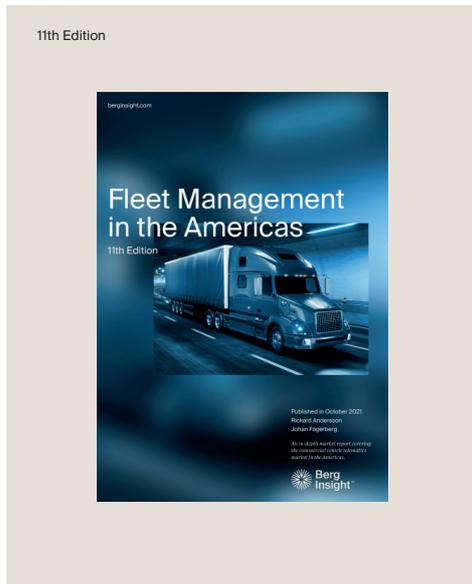
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Martin is a senior analyst who specialises in IoT applications for the smart homes and buildings, transportation and security markets. He joined Berg Insight in 2018 and is the lead author of numerous research reports. In addition to published research, he has provided bespoke research to clients ranging from IoT solution providers, management consulting firms, private equity firms and others. Prior to joining Berg Insight, Martin worked as a supply chain analyst at Volvo Group. Martin holds a Master's degree in Industrial Engineering and Management from Chalmers University of Technology.

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