



The Global Remote Tank Monitoring Market

4th edition

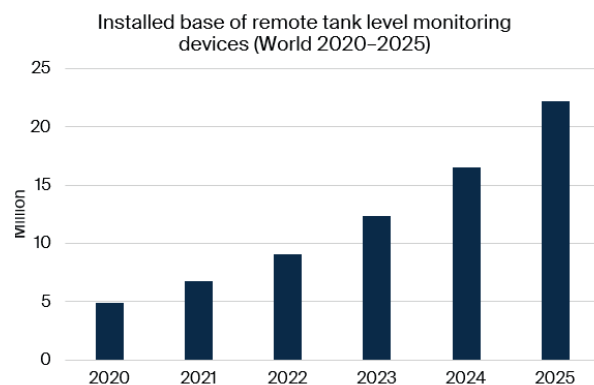
The Global Remote Tank Monitoring Market analyses the latest trends and developments on the market for connected tanks. This strategic research report from Berg Insight provides you with 100 pages of unique business intelligence including 5-year industry forecasts and expert commentary on which to base your business decisions.

The installed base of connected tanks to reach 22.2 million by 2025

Berg Insight estimates that the global installed base of active remote tank monitoring (RTM) solutions reached 4.8 million units in 2020. Growing at a compound annual growth rate (CAGR) of 35.5 percent, the active installed base is estimated to reach 22.2 million units worldwide in 2025. Berg Insight estimates that the European market accounted for more than 1.3 million active RTM systems at the end of 2020. The North American market is estimated to be larger than the European at around 1.6 million active units. The Asia-Pacific market is moreover estimated to represent an installed base of about 1.4 million RTM systems at the end of 2020. South America and Middle East & Africa are smaller markets having installed bases of 243,000 units and 388,000 units respectively.

There are more than 100 RTM solution vendors active on the market worldwide and this report covers 62 companies. Berg Insight ranks Otodata as the leading RTM solution provider in terms of the active installed base worldwide with an installed base of about 1.0 million RTM units. Otodata is based in Canada and primarily focuses on the fuel reseller segment in North America. Anova and SkyBitz (Ametek) were in second and third place having achieved installed bases of about 743,000 units and 180,000 units respectively. Anova has done a string of acquisitions including Independent Technologies, Wikon, ISA - Intelligent Sensing Anywhere and iTank (Sierra Wireless) and Silicon Controls to become the second largest RTM solution vendor with more than 2,000 customers in 70 countries. SkyBitz is based in the US and most of its tanks under management can be found in North

America and a few in Mexico and other countries. Polish AIUT and Sensile Technologies from Switzerland followed in fourth and fifth place and had installed bases of 138,000 and 100,000 tank monitoring systems respectively. Tank Utility, FoxInsights, Angus Energy, Dunraven Systems, WACnGO and Kingspan are also ranked among the largest providers with 55,000–92,000 units each. Other RTM solution providers with installed bases of 21,000–50,000 RTM systems in active use at the end of 2020 include Varec, ATEK Access Technologies, Powelextrics, Banner Engineering, FreeWave, SilentSoft, Insite Platform Partners, GreenCityZen and Schmitt Industries.



Highlights from the report

Insights from numerous interviews with market-leading companies.

Comprehensive overview of the remote tank monitoring value chain and key applications.

Summary of the latest industry trends and developments.

Updated in-depth profiles of 69 key players in this market.

Reviews of vendor market shares and competitive dynamics.

Extensive global and regional market forecasts lasting until 2025.

Table of contents

Executive summary

1 Tank monitoring solutions

- 1.1 Introduction to remote tank monitoring
 - 1.2 Remote tank monitoring infrastructure
 - 1.2.1 Tank segment
 - 1.2.2 GNSS segment
 - 1.2.3 Network segment
 - 1.2.4 Backoffice segment
 - 1.3 Tank fleet management
 - 1.3.1 Tank location tracking and level monitoring
 - 1.3.2 Security tracking and intervention
 - 1.3.3 Regulatory compliance and reporting
 - 1.3.4 Health and safety
 - 1.4 Distribution operations management
 - 1.4.1 Optimization of delivery and pick up routes
 - 1.4.2 Inventory management and analytics
 - 1.5 Tank segments and use cases
 - 1.6 Business models and project strategies
- ### 2 Market forecasts and trends
- 2.1 Market analysis
 - 2.1.1 The installed base of remote tank monitoring solutions
 - 2.1.2 Remote tank monitoring vendor market shares
 - 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 Telematics industry players
 - 2.3.2 Tank and level sensor industry players
 - 2.3.3 Telecom industry players
 - 2.3.4 IT industry players
 - 2.4 Future industry trends

3 Company profiles and strategies

3.1 European solution providers

- 3.1.1 AIUT
 - 3.1.2 AXsensor
 - 3.1.3 Dunraven Systems
 - 3.1.4 Endress+Hauser
 - 3.1.5 ETM Mättechnik
 - 3.1.6 FoxInsights
 - 3.1.7 Fuel it
 - 3.1.8 GreenCityZen
 - 3.1.9 HMS Industrial Networks
 - 3.1.10 iLevel
 - 3.1.11 Kingspan
 - 3.1.12 Measure Connect Display (MCD)
 - 3.1.13 Nanolike
 - 3.1.14 Oriel Systems
 - 3.1.15 Piusi
 - 3.1.16 Powelectrics
 - 3.1.17 Schneider Electric
 - 3.1.18 Sensile Technologies (Wika)
 - 3.1.19 Siemens
 - 3.1.20 SilentSoft
 - 3.1.21 Tecson
 - 3.1.22 Top Fuel
 - 3.1.23 VEGA
- #### 3.2 North American solution providers
- 3.2.1 Angus Energy
 - 3.2.2 Anova
 - 3.2.3 Asset Monitoring Solutions
 - 3.2.4 ATEK Access Technologies (TankScan)
 - 3.2.5 AT&T
 - 3.2.6 Automation Products Group
 - 3.2.7 Banner Engineering
 - 3.2.8 Digi International
 - 3.2.9 Electronic Sensors (Level Devil)
 - 3.2.10 Emerson
 - 3.2.11 FarmChem

- 3.2.12 Fluid Delivery Solutions
 - 3.2.13 Fource
 - 3.2.14 FreeWave Technologies
 - 3.2.15 Hoover Circular Solutions
 - 3.2.16 InSite Platform Partners (North American Satellite Corporation)
 - 3.2.17 Micro-Design
 - 3.2.18 New Boundary Technologies
 - 3.2.19 OleumTech
 - 3.2.20 Otodata
 - 3.2.21 Pulsa
 - 3.2.22 REDtrac
 - 3.2.23 Rugged Telemetry
 - 3.2.24 Schmitt Industries (Xact Tank Monitoring Systems)
 - 3.2.25 SkyBitz (Ametek)
 - 3.2.26 Tank Utilit
 - 3.2.27 Trimble
 - 3.2.28 Valarm
 - 3.2.29 Varec
 - 3.2.30 Wise Telemetry
- #### 3.3 Rest of World solution providers
- 3.3.1 360Tanks
 - 3.3.2 Farmbot
 - 3.3.3 Farm Monitoring Solutions
 - 3.3.4 Hawk Measurement (FLO-CORP)
 - 3.3.5 HyDip (IOR)
 - 3.3.6 Omniflex
 - 3.3.7 Solidat Applied Technologies
 - 3.3.8 Tanktel
 - 3.3.9 WACnGO
- #### 3.4 Tank level sensor manufacturers
- 3.4.1 Flowline
 - 3.4.2 Gobius Sensor Technology
 - 3.4.3 Pepperl+Fuchs
 - 3.4.4 Senix
 - 3.4.5 Tekelek
 - 3.4.6 Terabee
 - 3.4.7 Wika

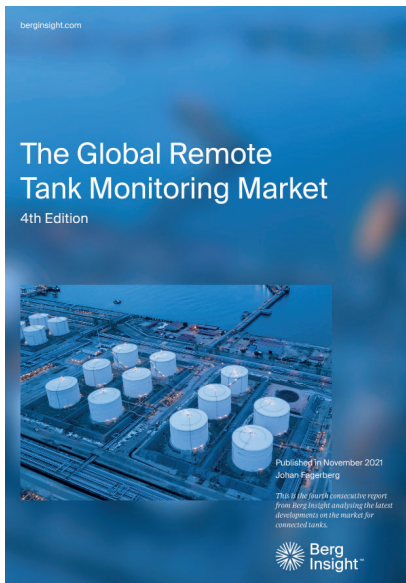
This report answers the following questions

- What is the potential market size for remote tank monitoring applications?
- Which trends and developments are shaping the market?
- Which are the key application areas for this technology?
- What business models are used by the solution vendors?
- What are the market shares for the leading solution vendors?
- How will emerging LPWA connectivity options affect the market?
- How will the remote tank level monitoring 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 55 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.



INDUSTRIAL IOT

The Global Remote Tank Monitoring Market

PUBLISHED DATE

November 2021

AUTHOR

Johan Fagerberg

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 buy this report?

The Global Remote Tank Monitoring Market is the foremost source of information about the adoption of connected tank level measurement devices in multiple market segments. Whether you are a device vendor, service provider, telecom operator, investor, consultant, tank fleet owner or government agency, you will gain valuable insights from our in-depth research.

AUTHOR

Johan Fagerberg

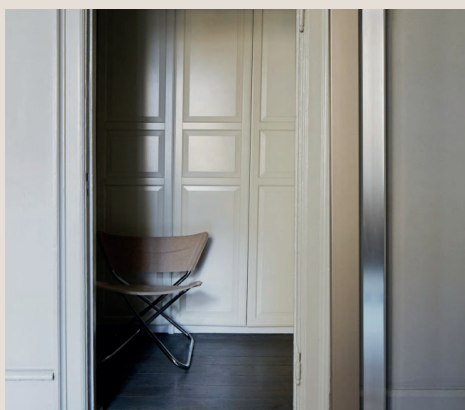


Johan is the CEO and co-founder of Berg Insight. He is a respected IoT industry expert, with 25 years' experience of strategy consulting, operations management and telecoms market research. His past research has covered automotive telematics, fleet management and industrial IoT topics. Johan is widely quoted in trade publications such as IoT Now Transport, Light Reading, Automotive World and IoT Business News. Johan holds a Master's degree in Electrical Engineering from Chalmers University of Technology in Sweden and a post graduate degree program in project management.

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.