



Aftermarket Car Telematics

3rd Edition

Aftermarket Car Telematics is the third consecutive report from Berg Insight analysing the latest developments on the market for applications such as stolen vehicle tracking (SVT), vehicle diagnostics, Wi-Fi hotspot, roadside assistance and convenience applications targeting consumers. This strategic research report from Berg Insight provides you with 225 pages of unique business intelligence including 5-year industry forecasts and expert commentary on which to base your business decisions.

The installed base of aftermarket car telematics devices was 87.4 million at year-end 2021

Telematics is a broad term that may be applied to a wide range of automotive connectivity solutions. Berg Insight's definition of an aftermarket car telematics solution in this report includes telematics devices created by a company other than the carmakers and are retrofitted into vehicles mainly via OBD-II and blackbox devices based on both cellular/GNSS and RF technology. The connected car is a major trend in the automotive industry. After many years of development and false starts, car telematics has gained momentum and virtually all of the world's leading carmakers have launched mass-market services in key regions. The OEM initiatives can be seen as competition for the aftermarket solutions, but there is still a growing demand for different forms of aftermarket car telematics services. Aftermarket telematics still has a dominant position on the market in many parts of the world. Several categories of aftermarket car telematics applications have become popular including roadside assistance, stolen vehicle tracking (SVT), vehicle diagnostics, usage-based insurance, dealer and inventory management, Wi-Fi hotspot as well as convenience applications targeting consumers.

The addressable market for aftermarket car telematics solutions is significant. At the end of 2020, there were an estimated 1.3 billion passenger cars and light trucks registered worldwide. Even though aftermarket car telematics services face competition from smartphone-only solutions and OEM solutions, Berg Insight is of the opinion that the aftermarket car telematics market is in a growth phase. Berg Insight estimates that total shipments of aftermarket car telematics systems reached almost 26.6 million units worldwide in 2021. Growing at a compound annual growth rate of 10.7 percent, shipments are expected to reach 44.3 million units in 2026. The number of aftermarket car telematics systems in active use is forecasted to grow at a compound annual growth rate of 11.6 percent from 87.4 million in 2021 to 151.6 million worldwide in 2026. The penetration rate will at the same time grow from 6.7 percent in 2021 to 10.4 percent at the end of the forecast period.

The market is still in an early phase with a great diversity of players interacting in a complex value chain that spans multiple industries. The car telematics companies targeting the consumer aftermarket include specialists focusing on this application area only as well as general telematics players that serve a broad range of applications including also for example fleet management for commercial vehicles. The leading aftermarket car telematics solution providers have reached installed bases in the millions. Examples of leading car telematics solution vendors include Octo Telematics, Targa Telematics, Spireon, Procon Analytics, Ituran, SareKon, Mojo, CalAmp (LoJack), Viasat Group and Vodafone

Automotive. The most common go-to-market strategy is to partner with insurance companies, dealers, OEMs, MNOs and vehicle finance companies. Leading companies delivering telematics hardware and related services to the aftermarket car telematics market include Danlaw, Xirgo Technologies, Gosuncn, Munic, Queclink and Teltonika.

Stolen vehicle recovery and security-related telematics applications are mature aftermarket car telematics applications whereas other direct-to-consumer car telematics solutions have more recently started to emerge. Regional market conditions such as a high level of vehicle crime influence the demand for stolen vehicle tracking and have made SVT solutions popular in countries such as Brazil, Argentina, China, Israel, Russia and South Africa. The levels of vehicle thefts have gone up during the past couple of years. For example, there were an estimated 810,000 thefts of motor vehicles in the US in 2020, an increase of 11.8 percent year-on-year. The number of dedicated active aftermarket SVT units in use is forecasted to reach 82.4 million in 2026, up from 53.1 million at year-end 2021.

Telematics has become an important part of the aftersales programmes of dealers and vehicle finance companies, enabling remote diagnostics and direct communication with drivers. There is a tremendous opportunity to turn a reactive way of managing customers into a proactive process by integrating CRM solutions, using data from cars intelligently. Collecting data from the fleet on the lot is also valuable for dealers in order to for example collect information about faulty components and software bugs as well as battery status. Direct-to-consumer car telematics offerings are available to a varying degree in many regions by companies such as Bounce, CarLock and Autobrain. Many direct-to-consumer car telematics providers have broadened their product portfolios to include additional telematics application areas such as fleet management as well as powering B2B2C telematics services.

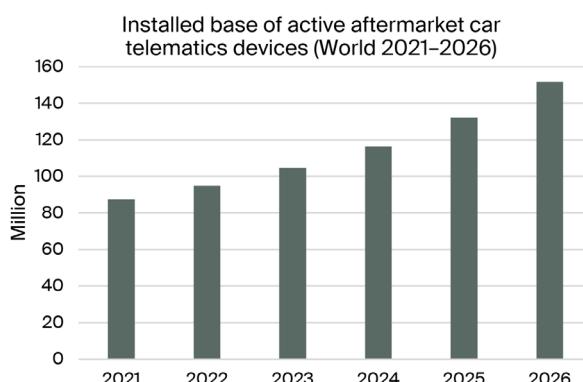


Table of contents

Executive summary

1 The global passenger car market

1.1 Introduction

Passenger cars in use by region

New passenger car registration trends

Hybrid electric, plug-in hybrid electric and all-electric vehicles

1.2 Overview of aftermarket car telematics services

Aftermarket car telematics services in Europe

Aftermarket car telematics services in the Americas

Aftermarket car telematics services in ROW

1.3 Regulatory compliance

Vehicle security, safety and emergency call regulations

The eCall and ERA-GLOASS initiatives

Insurance industry standards for vehicle tracking

1.4 Vehicle crime

2 Car telematics solutions

2.1 Aftermarket telematics infrastructure

Vehicle segment

Tracking segment

Network segment

Service segment

2.2 Aftermarket car telematics applications

eCall and roadside assistance

Stolen vehicle tracking

Motor insurance telematics

Dealer lot management

Vehicle finance telematics

Remote control and convenience services

Vehicle diagnostics and maintenance

Electronic toll collection and congestion charging

Wi-Fi hotspot

Vehicle emission monitoring

2.3 Business models

3 Market forecasts and trends

3.1 Aftermarket car telematics market sizing

Aftermarket car telematics in Europe

Aftermarket car telematics in the Americas

Aftermarket car telematics in ROW

Vendor market shares

3.2 Value chain analysis

Automotive industry players

Telematics industry players

Telecom industry players

IT industry players

3.3 Market drivers and barriers

Macroeconomic environment

Regulatory environment

Competitive environment

Technology environment

3.4 Market trends and conclusions

Continued broadening of the aftermarket car telematics concept is expected

3.4.2 Privacy concerns are softening

3.4.3 Aftermarket SVT/SVR services compete with OEM services in many countries

3.4.4 Usage-based insurance to remain an aftermarket service in most countries

3.4.5 Insurance companies insource telematics activities in many markets

3.4.6 Smartphone-based telematics solutions compete with aftermarket telematics

3.4.7 CRM solutions and vehicle diagnostics enable improved customer care

3.4.8 Wi-Fi hotspots enable convenient connectivity for passengers

3.4.9 Car telematics service providers to use a wide ecosystem of partners

3.4.10 Aftermarket telematics can help OEMs manage network shutdowns

3.4.11 New IoT Technologies to simplify aftermarket car telematics services

4 International car telematics solution providers

4.1 CalAmp (LoJack International)

4.2 Connected Cars

4.3 Continental

4.4 Harman

4.5 IMS (Trak Global Group)

4.6 Ituran

4.7 Mojio

4.8 Motix Connected

4.9 Octo Telematics

4.10 PowerFleet

4.11 Scope Technology

4.12 Springworks International

4.13 Targa Telematics

4.14 Teletrac Navman Automotive

4.15 Verizon

4.16 Viasat Group

4.17 Vodafone and Vodafone Automotive

5 Company profiles and strategies

5.1 Providers of SVT/SVR and related services

5.1.1 Autoconnex

5.1.2 Autolocator

5.1.3 Cesar Satellite

5.1.4 StarLine

5.1.5 Coyote (Traqueur)

5.1.6 FairConnect

5.1.7 Ingenie Business

5.1.8 Sherlog Technology

5.1.9 BrickHouse Security

5.1.10 Certified Tracking Solutions

5.1.11 Cox Automotive and Cox2M

5.1.12 Guidepoint Systems

5.1.13 Ikon Technologies

5.1.14 IMETRIK Global

5.1.15 MasTrack

5.1.16 PassTime GPS

5.1.17 Procon Analytics

5.1.18 SareKon

5.1.19 Skypatrol

5.1.20 Spireon

5.1.21 SVR Tracking

5.1.22 Autotrac

5.1.23 Car Security (LoJack Argentina)

5.1.24 CEABS

5.1.25 Maxtrack

5.1.26 Omnilink

5.1.27 Positron (Stoneridge)

5.1.28 Active Telematics

5.1.29 Katsana

5.1.30 TPL Trakker

5.1.31 ACM Track

5.1.32 Bidtrack (Bidvest Group)

5.1.33 Ctrack South Africa

5.1.34 Cartrack (Karooooo)

5.1.35 Digicell

5.1.36 MiX Telematics

5.1.37 Netstar

5.1.38 Tracker Connect

5.2 Consumer telematics solution providers

5.2.1 Air

5.2.2 AutoSense

5.2.3 Grupo Next

5.2.4 Net4Things

5.2.5 Protectus Technologies (CarLock)

5.2.6 Paydrive

5.2.7 The Plan B Company

5.2.8 Ryd (Thinxnet)

5.2.9 AccuTracking

5.2.10 Autobrain

5.2.11 Autonet Mobile

5.2.12 Agnik (Vyncs)

5.2.13 LandAirSea

5.2.14 Linxup (MOTOSafety)

5.2.15 Modus

5.2.16 Tail Light (Bouncie)

5.2.17 Voyomotive

5.2.18 Zubie

5.2.19 Comodif

5.2.20 Beijing Yesway Information Technology

5.2.21 CarlQ

5.2.22 Minda iConnect (Carot India)

5.2.23 PATEO

5.2.24 SenSight Technologies (AutoWiz)

5.2.25 Jooycar

5.3 Technology vendors

5.3.1 Danlaw

5.3.2 Gosuncn WeLink

5.3.3 Jimi (Concox)

5.3.4 Meitrack

5.3.5 Meta System

5.3.6 Munic

5.3.7 Neoway

5.3.8 PFK Electronics

5.3.9 Positioning Universal

5.3.10 Quartix

5.3.11 Queclink Wireless Solutions

5.3.12 Questar Auto Technologies

5.3.13 Redtail Telematics

5.3.14 Sinocastel

5.3.15 Teltonika

5.3.16 Trakm8

5.3.17 ThinkRace

5.3.18 Xirgo Technologies (Sensata)

Glossary

Highlights from the report

- Insights from 30 new executive interviews with market leading companies.
- Comprehensive overview of the aftermarket car telematics value chain and key applications.
- In-depth analysis of market trends and key developments.
- New profiles of 98 aftermarket car telematics solution providers.
- Summary of the involvement of vehicle OEMs and mobile operators.
- New data on car populations and new car registrations worldwide.
- Market forecasts by region lasting until 2026.

The report answers the following questions

- What types of aftermarket car telematics products are offered on the market?
- Which are the leading providers of aftermarket car telematics technology?
- What business models are available for players entering the car telematics space?
- Which are the dominant technology form factors?
- How will the market evolve in Europe, North America, Latin America, Asia-Pacific and MEA?
- How are mobile operators approaching the aftermarket car telematics market?
- Will car OEM telematics solutions outcompete aftermarket car telematics in the long term?
- Which are the major drivers and barriers for car telematics adoption?
- Which are the key future trends in this industry?



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.



AUTOMOTIVE

Aftermarket Car Telematics

What are the latest trends and business opportunities for aftermarket car telematics? Berg Insight estimates that total shipments of aftermarket car telematics systems reached 26.6 million units worldwide in 2021. Growing at a compound annual growth rate of 10.7 percent, shipments are expected to reach 44.3 million units in 2026. The aftermarket car telematics applications covered in the report include stolen vehicle tracking, roadside assistance, vehicle diagnostics, Wi-Fi hotspot and various convenience applications. Get up to date with the latest industry trends in this new 225-page strategy report from Berg Insight.

PUBLISHED DATE	May 2022
EDITION	3rd
PAGES	225
AUTHOR	Martin Svegander

PDF & EXCEL: 1 user license	€ 1500
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?

Aftermarket Car Telematics is the foremost source of information about the adoption of car telematics for consumers. Whether you are a telematics vendor, insurance company, vehicle manufacturer, telecom operator, investor, consultant, or government agency, you will gain valuable insights from our in-depth research.

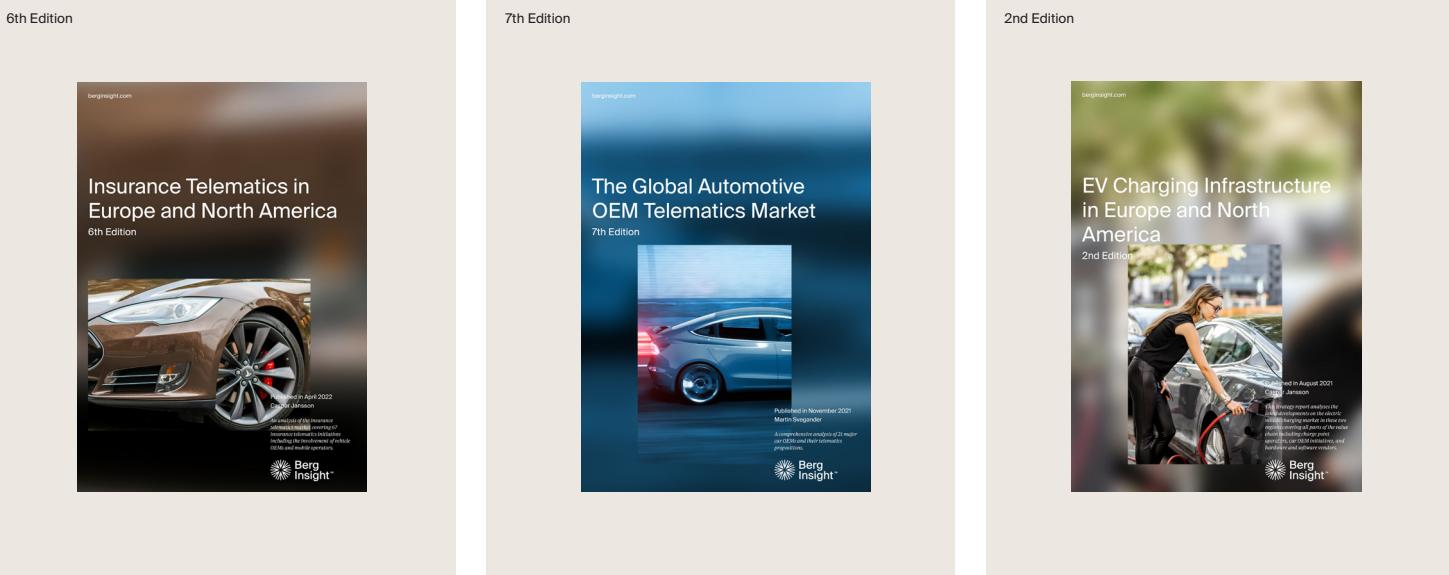
AUTHOR

Martin Svegander



Martin leads the automotive research programme at Berg Insight and is recognised as a thought leader in the connected car ecosystem. He performs strategic analysis of OEM and aftermarket car telematics services, data monetisation services such as insurance telematics and shared mobility, among many other topics. Martin's research has been widely quoted in IoT industry magazines and other major publications such as Financial Times, The Wall Street Journal, The Times and The New York Times. Martin holds a Master of Science in Industrial Engineering and Management from the Institute of Technology, Linköping University, Sweden and joined Berg Insight in 2017.

Related products *Find them and more on berginsight.com*



CATEGORY

Automotive

CATEGORY

Automotive

CATEGORY

Automotive

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.