



Trailer and Cargo Container Tracking

10th edition

Trailer and Cargo Container Tracking is the tenth 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 235 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 will reach 33 million by 2026

Trailer and cargo container tracking is a subsegment of asset tracking that aims to increase operational efficiency and security in transport chains. Berg Insight's definition of a real-time tracking solution is a system that, at minimum, incorporates data logging, satellite positioning and data communications to a backoffice application through cellular or satellite networks. The tracking device can be designed to track the trailer, intermodal container, rail freight wagon, air freight ULD or the cargo itself. Tracking devices for trailers and cargo containers are permanently or temporarily installed on the unit while general cargo tracking devices are typically placed with the cargo during transport. Having access to real-time data on the location and status of trailers and cargo containers enable the various stakeholders in the supply chain to make better-informed decisions, increase asset utilization, save costs and reduce the environmental impact.

Berg Insight estimates that shipments of tracking devices with cellular or satellite communications capabilities for trailers and cargo containers reached 6.0 million units worldwide in 2021. Growing at a compound annual growth rate (CAGR) of 25.0 percent, shipments are expected to reach 18.3 million units in 2026. During the same period, the installed base of tracking devices is forecasted to grow at a compound annual growth rate of 24.4 percent, from 11.1 million units at the end of 2021 to 33.1 million units by 2026. Trailer tracking is the largest market segment, estimated to account for 35.0 percent of the total installed base of tracking devices in 2021. General cargo tracking and intermodal container tracking are the second and third largest segments in terms of the number of installed units. Total revenues in the trailer and cargo container tracking industry reached an estimated €1.5 billion in 2021. Growing at a CAGR of 14.1 percent, the total market value is forecasted to reach €2.9 billion in 2026. Trailer and intermodal container tracking applications are the two largest segments in terms of market value.

The market for trailer, cargo container and general cargo tracking solutions is served by a wide range of players. Companies offering solutions for cargo carrying units typically focus on one application, e.g. trailer tracking. However, these companies often have devices installed on several different asset types. General cargo tracking solution providers are most often specialised in that market segment. Berg Insight ranks ORBCOMM as the largest provider of cargo tracking solutions, having a significant installed base of both trailers and containers. The company's total installed base reached more than 828,000 units at the end of 2021. The second largest player SkyBitz has an installed base of 685,000 tracking units, primarily on trailers. Additional leading providers of trailer telematics solutions are Spireon (now owned by Solera), Samsara, CalAmp, Powerfleet, Phillips Connect (the telematics division of Phillips Industries), Idem

Telematics, Schmitz Cargobull, TGI, Transics (ZF), EROAD, BlackBerry, Cooltrax, Geoforce and CLS Group.

The container tracking market is dominated by Maersk, which has equipped its entire fleet of 385,000 reefer containers with tracking devices. Other major players in the segment are Envotech, ZillionSource, Globe Tracker, Traxens and MECOMO. Globe Tracker has grown rapidly in the past year and has now reached an installed base of well over 100,000 container tracking units. The company has a major ongoing project with the liner shipping company Hapag-Lloyd to equip its entire reefer container fleet with tracking units. Leading telematics players in the rail industry are Nexxiot, Amsted Rail, Siemens, SAVVY Telematic Systems, DOT Telematik and Cognid Telematik. Nexxiot is the leading player in the segment, working on large-scale projects in Europe. Sensitech (part of Carrier), DeltaTrak, Tive, Roambee, Controlant, Frigga (Dewav Electronic Technology) and OnAsset Intelligence are the largest providers of cargo tracking devices, each with more than hundred thousand devices in use. These players offer tracking devices that can be used on all modes of transport, including air freight.

About 29 million intermodal containers, 15 million trailers, 5 million rail freight wagons and one million air freight ULDs are in use worldwide today. The penetration rate of tracking devices installed on these cargo carrying units amounts to only about 15 percent, indicating that there is much room for growth. Berg Insight anticipates that the ongoing trend in the transport industry to invest in new digital solutions that increase visibility and security in the supply chain will continue and even accelerate in the coming next few years. The recent disruptions in the global supply chain caused by the pandemic have accentuated the need for real-time shipment data. Bolstered by new IoT communications technologies, solution providers are now able to design cost-effective tracking solutions that meet the needs of fleet and asset owners, transport companies, shippers and other stakeholders in the transport industry.

Installed base of active trailer and cargo container tracking units (World 2021–2026)

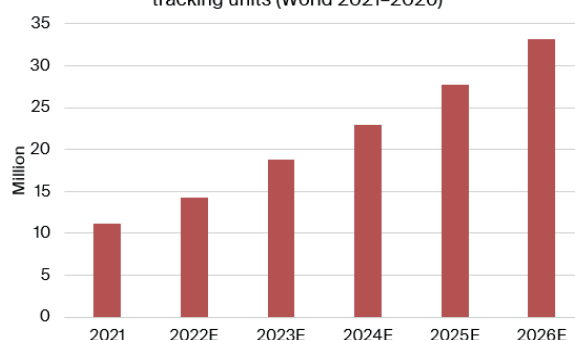


Table of contents

Executive summary

1 Global Freight Transport Overview

- 1.1 International merchandise trade
 - 1.1.1 Freight transportation modes
 - 1.1.2 Logistics units and containerisation
 - 1.1.3 Transport industry actors
- 1.2 Cargo carrying units
 - 1.2.1 Intermodal shipping containers
 - 1.2.2 Trailers and semi-trailers
 - 1.2.3 Rail freight wagons
 - 1.2.4 Air freight unit load devices

2 Trailer and Cargo Container Tracking Solutions

- 2.1 Trailer and cargo container tracking infrastructure
 - 2.1.1 Trailer and cargo container segment
 - 2.1.2 GNSS segment
 - 2.1.3 Network segment
 - 2.1.4 Service segment
- 2.2 Benefits of using tracking solutions
 - 2.2.1 Supply chain management
 - 2.2.2 Security management
 - 2.2.3 Trailer and cargo container management
- 2.3 Regulatory compliance and reporting
 - 2.3.1 Supply chain security and environmental programs
 - 2.3.2 Tax collection
- 2.4 International container and cargo tracking technology initiatives
 - 2.4.1 The Integrity project
 - 2.4.2 The Smart-CM project
 - 2.4.3 The CORE project
 - 2.4.4 The SaMoLoSa project
 - 2.4.5 The US Department of Homeland Security's Cargo Security Programs
 - 2.4.6 The NextTrust project
 - 2.4.7 The DataPorts project
 - 2.4.8 Container 42
 - 2.4.9 Digital Container Shipping Association (DCSA)
- 2.5 Business models

3 Market Forecasts and Trends

- 3.1 Market analysis
 - 3.1.1 Installed base and unit shipments
 - 3.1.2 Market value
 - 3.1.3 Regional markets
 - 3.1.4 Vendor market shares
- 3.2 Value chain analysis
 - 3.2.1 Telematics industry players
 - 3.2.2 Cargo transport industry players
 - 3.2.3 Trailer and cargo container OEMs and OEs
 - 3.2.4 Telecom industry players
 - 3.2.5 IT industry players
- 3.3 Market drivers and barriers
 - 3.3.1 Macroeconomic environment
 - 3.3.2 Regulatory environment
 - 3.3.3 Competitive environment
 - 3.3.4 Technology environment
- 3.4 Future industry trends
 - 3.4.1 Trailer OEMs incorporate telematics as standard
 - 3.4.2 The TPMS mandate in the EU is expected to drive adoption of trailer telematics
 - 3.4.3 Advanced tracking solutions increase the value for logistics providers

- 3.4.4 OE trailer suppliers enable smart trailer solutions
- 3.4.5 Individual cargo tracking solutions increase supply chain visibility
- 3.4.6 Solutions for refrigerated cargo lead the tracking market
- 3.4.7 New LPWA networking technologies increasingly used for cargo tracking
- 3.4.8 2G/3G sunset creates opportunities for tracking solution providers
- 3.4.9 Rail freight wagon tracking – a potential high growth market
- 3.4.10 Big shift in the intermodal container tracking industry

4 OEM Products and Strategies

- 4.1 Carrier
- 4.2 China International Marine Containers (CIMC)
- 4.3 Daikin Industries
- 4.4 Envirotainer
- 4.5 Great Dane
- 4.6 Hyundai Translead
- 4.7 Krone
- 4.8 Kögel
- 4.9 Schmitz Cargobull
- 4.10 Schwarzmüller Group
- 4.11 Thermo King (Trane Technologies)
- 4.12 Trinity Industries
- 4.13 Utility Trailer Manufacturing
- 4.14 Wabash National
- 4.15 Wielton Group

5 Vendor Profiles and Strategies

- 5.1 European solution providers
 - 5.1.1 AddSecure
 - 5.1.2 Agheera
 - 5.1.3 Axscent (SAF-Holland)
 - 5.1.4 Bosch
 - 5.1.5 CargoGuard
 - 5.1.6 Cargomon Systems
 - 5.1.7 CLS Group
 - 5.1.8 Cognid Telematik
 - 5.1.9 Controlant
 - 5.1.10 DOT Telematik
 - 5.1.11 Fly4u (Groupe ZeKat)
 - 5.1.12 Globe Tracker
 - 5.1.13 Hanhaa
 - 5.1.14 Idem Telematics (BPW)
 - 5.1.15 Intermodal Telematics
 - 5.1.16 Kirsen Global Security
 - 5.1.17 Kizy Tracking
 - 5.1.18 KPN
 - 5.1.19 Maersk
 - 5.1.20 MECOMO
 - 5.1.21 Net Feasa
 - 5.1.22 Next4 (Traxens)
 - 5.1.23 Nexxiot
 - 5.1.24 Ovinto
 - 5.1.25 RM2
 - 5.1.26 SAVVY Telematic Systems
 - 5.1.27 SecureSystem
 - 5.1.28 Sensolus
 - 5.1.29 Siemens
 - 5.1.30 Sycada
 - 5.1.31 Transics (ZF)
 - 5.1.32 Traxens
 - 5.1.33 Trusted
 - 5.1.34 Ubidata
 - 5.1.35 Zenatek

5.2 North American solution providers

- 5.2.1 7PSolutions
 - 5.2.2 Amsted Rail
 - 5.2.3 AT&T
 - 5.2.4 Ayantra
 - 5.2.5 BeWhere
 - 5.2.6 BlackBerry
 - 5.2.7 CalAmp
 - 5.2.8 Clarience Technologies
 - 5.2.9 DeltaTrak
 - 5.2.10 Digi International
 - 5.2.11 Digital Communications Technologies
 - 5.2.12 Dröv Technologies
 - 5.2.13 Emerson
 - 5.2.14 Fleet Complete
 - 5.2.15 Fleetilla
 - 5.2.16 Geoforce
 - 5.2.17 Globalstar
 - 5.2.18 Honeywell
 - 5.2.19 Intelyt
 - 5.2.20 Lat-Lon (Geotab)
 - 5.2.21 Mobilogix (Telit)
 - 5.2.22 Omnitrac (Solera)
 - 5.2.23 OnAsset Intelligence
 - 5.2.24 ORBCOMM
 - 5.2.25 Pallet Alliance
 - 5.2.26 Phillips Industries
 - 5.2.27 Powerfleet
 - 5.2.28 Roambee
 - 5.2.29 RSAE Labs
 - 5.2.30 Samsara
 - 5.2.31 Sendum Wireless
 - 5.2.32 Sensata
 - 5.2.33 Sensitech (Carrier)
 - 5.2.34 Sierra Wireless
 - 5.2.35 SkyBitz (AMETEK)
 - 5.2.36 Spireon (Solera)
 - 5.2.37 SpotSee
 - 5.2.38 Teletrac Navman
 - 5.2.39 TGI
 - 5.2.40 Tive
 - 5.2.41 Trimble
 - 5.2.42 Wireless Links
- ### 5.3 Rest of World solution providers
- 5.3.1 Adapt Ideations
 - 5.3.2 ArrowSpot
 - 5.3.3 Contguard
 - 5.3.4 Cooltrax
 - 5.3.5 Envotech
 - 5.3.6 EROAD
 - 5.3.7 Frigga (Dewav Electronic Technology)
 - 5.3.8 Loginno Logistic Innovation
 - 5.3.9 Mix Telematics
 - 5.3.10 Queclink Wireless Solutions
 - 5.3.11 Satlock
 - 5.3.12 Sony
 - 5.3.13 Swinnus
 - 5.3.14 T42 IoT Tracking Solutions
 - 5.3.15 TPL Trakker
 - 5.3.16 Tracertrak (Pivotel)
 - 5.3.17 ZillionSource Technologies

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 major cargo tracking initiatives from the EU and the US.

Updated profiles of 109 cargo container tracking solution providers.

Detailed forecasts by market vertical lasting until 2026.

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

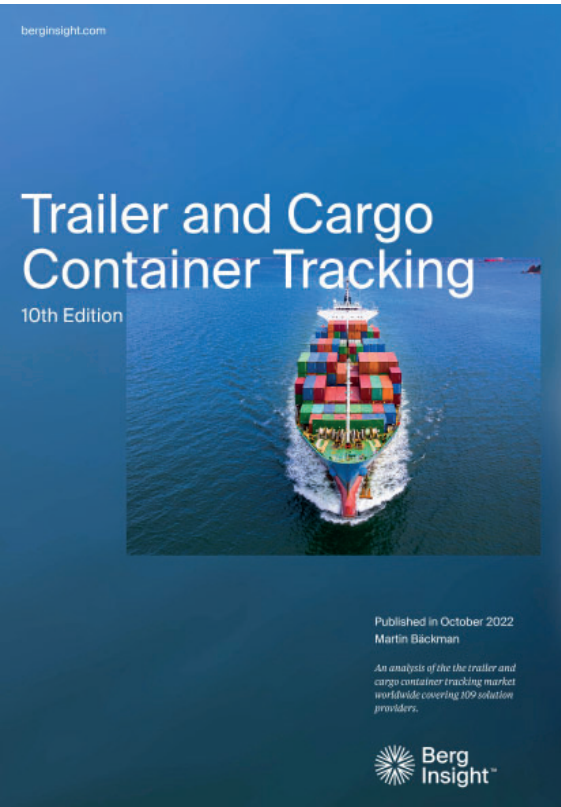
This report answers the following questions

- 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 60 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, 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 24.4 percent from 11.1 million units at the end of 2021 to 33.1 million units by 2026. Get up to date with the latest information about vendors, products and markets.

PUBLISHED DATE	October 2022
EDITION	10th
PAGES	235
AUTHOR	Martin Bäckman

PDF & EXCEL: 1 user license	€ 1 500
PDF & EXCEL: 2-10 user license	€ 2 250
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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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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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