



The Global Construction Equipment OEM Telematics Market

5th edition

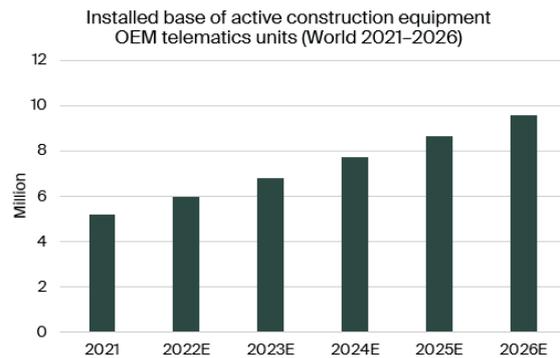
The Global Construction Equipment OEM Telematics Market is the fifth consecutive report from Berg Insight analysing the latest developments on the market for OEM-provided construction equipment telematics systems. This strategic research report from Berg Insight provides you with 130 pages of unique business intelligence including 5-year industry forecasts and expert commentary on which to base your business decisions.

Berg Insight forecasts 9.6 million active construction equipment OEM telematics systems by 2026

Berg Insight has found that the global installed base of active construction equipment OEM telematics systems reached 5.2 million units in 2021. Growing at a compound annual growth rate (CAGR) of 13.0 percent, the active installed base is forecasted to reach 9.6 million units worldwide in 2026. 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 0.8 million active construction equipment OEM telematics systems at the end of 2021. 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 and Komatsu as the leading construction equipment OEMs in terms of the number of CE telematics systems deployed worldwide. Based in the US and Japan respectively, the two companies are also by far the leading construction equipment manufacturers in terms of market share. Caterpillar was the first to surpass the milestone of 1 million connected assets in the construction segment. Caterpillar's largest markets for its telematics offerings are North America and Europe while Komatsu has

the largest share of its telematics units in Japan and China followed by North America and Europe. Other major players with several hundred thousand active CE telematics units include SANY in China, Sweden-based Volvo Construction Equipment, JCB headquartered in the UK and Japan-based Hitachi Construction Machinery. Deere & Company, Hyundai Heavy Industries and Doosan Bobcat are also estimated to have reached the milestone of 100,000 units. Additional players having installed bases of construction equipment telematics units in the tens of thousands include Liebherr, Terex, JLG Industries, CNH Industrial and Tadano.



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 26 construction equipment OEMs and their telematics offerings.

Market forecasts by region lasting until 2026.

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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 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.

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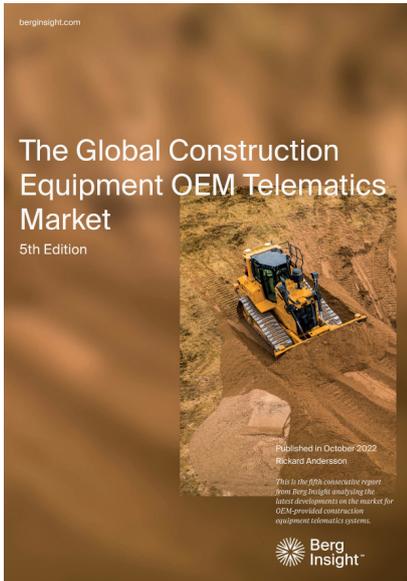
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PUBLISHED DATE October 2022

AUTHOR Rickard Andersson

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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.

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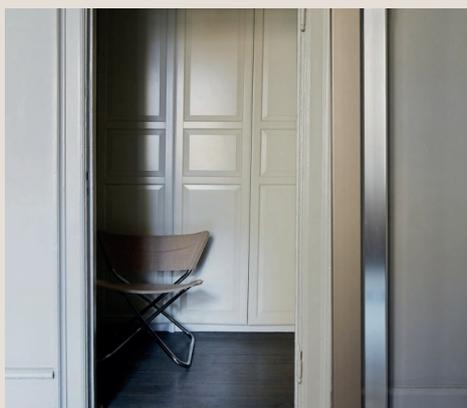


Rickard is a principal analyst with more than 10 years' experience in market research and advisory in the commercial telematics industry. His key areas of expertise include on-road and off-road fleet telematics including video telematics. Rickard has published research on various telematics topics including 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.

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