



The Video Telematics Market

4th Edition

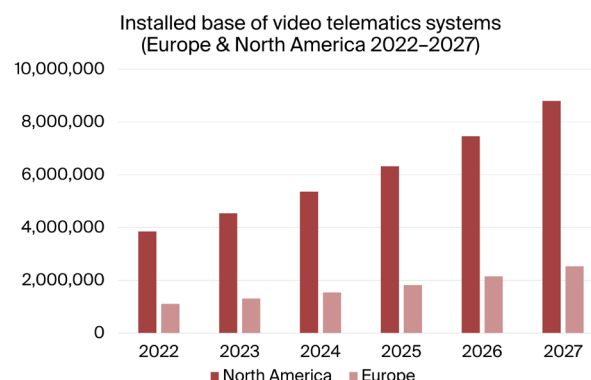
The Video Telematics Market is the fourth consecutive report from Berg Insight analysing the latest developments on the market for video telematics solutions. This strategic research report from Berg Insight provides you with 170 pages of unique business intelligence including 5-year industry forecasts and expert commentary on which to base your business decisions.

North America and Europe to account for 11 million video telematics systems in use by 2027

The integration of cameras to enable various video-based solutions in commercial vehicle environments is one of the most apparent trends in the fleet telematics sector today. Berg Insight's definition of video telematics includes a broad range of camera-based solutions deployed in commercial vehicle fleets either as standalone applications or as an additional feature set of conventional fleet telematics. Berg Insight estimates that the installed base of active video telematics systems in North America reached almost 3.9 million units in 2022. Growing at a compound annual growth rate (CAGR) of 18.0 percent, the active installed base is forecasted to reach 8.8 million units in North America by 2027. In Europe, the installed base of active video telematics systems reached over 1.1 million units in 2022. The active installed base is forecasted to grow at a CAGR of 17.9 percent to reach 2.5 million video telematics systems in Europe by 2027.

The video telematics market is served by many companies ranging from specialists focused specifically on video telematics solutions for various commercial vehicles, to general fleet telematics players which have introduced video offerings, and hardware-focused suppliers offering mobile digital video recorders (DVRs) and vehicle cameras used for video telematics. Berg Insight ranks Streamax, Lytx and Samsara as the leading video telematics players in their respective categories. Streamax is the leading hardware provider, having over 2.4 million mobile DVRs installed in vehicles globally to date, and the company also offers software dashboards which are widely used together with its devices. Lytx in turn has the largest number of video telematics subscriptions, while Samsara stands out among the general

fleet telematics players with a significant number of camera units deployed across its subscriber base. Additional sizeable players include the new channel-focused brand Sensata INSIGHTS, the fleet management player Motive, the hardware-focused video telematics company Howen, and the fleet management provider Solera Fleet Solutions. The remaining top-10 players are Netradyn, Nauto and VisionTrack which all have a primary focus on camera-based solutions specifically. Other noteworthy players include video-focused solution providers such as Bendix (SafetyDirect by Bendix CVS), Idrive, SureCam, LightMetrics, Waylens, Seeing Machines and CameraMatics; fleet telematics players including Trimble, Matrix iQ, MiX Telematics, Forward Thinking Systems, Radius Telematics, ISAAC Instruments, Azuga, Microlise, Trakm8 and AddSecure Smart Transport; as well as the hardware-focused supplier Pittasoft (BlackVue), which have all reached estimated installed bases in the tens of thousands.



Highlights from the report

Insights from numerous interviews with market-leading companies.

Descriptions of video telematics applications and associated concepts.

Comprehensive overview of the video telematics value chain.

In-depth analysis of market trends and key developments.

Updated profiles of 40 companies offering video telematics software and hardware.

Market forecasts lasting until 2027.

Table of contents

Executive Summary

1 Video Telematics Solutions

- 1.1 Introduction to video telematics
 - 1.1.1 Video telematics as a standalone application
 - 1.1.2 Video telematics as an integrated part of fleet telematics
- 1.2 Video telematics applications and associated concepts
 - 1.2.1 Video-based driver management
 - 1.2.2 Driver fatigue and distraction monitoring
 - 1.2.3 Advanced driver assistance systems (ADAS)
 - 1.2.4 Driver training and coaching
 - 1.2.5 Managed services
 - 1.2.6 Exoneration of drivers and insurance-related functionality
- 1.3 Business models

2 Market Forecasts and Trends

- 2.1 Market analysis
 - 2.1.1 Video telematics vendor market shares
 - 2.1.2 The North American video telematics market
 - 2.1.3 The European video telematics market
 - 2.1.4 Rest of World outlook
- 2.2 Value chain analysis
 - 2.2.1 Video telematics solution providers
 - 2.2.2 Fleet telematics solution providers
 - 2.2.3 Hardware-focused suppliers
 - 2.2.4 Insurance industry players
- 2.3 Market drivers and trends
 - 2.3.1 Privacy issues expected to soften as video telematics becomes mainstream

- 2.3.2 Acknowledging the performance of good drivers can alleviate scepticism
- 2.3.3 Regulatory developments can drive adoption of camera-based technology
- 2.3.4 Video telematics is at the core of the current M&A wave in the FM space
- 2.3.5 Partnership strategies increasingly common in the video telematics space
- 2.3.6 Increasing commoditisation of video telematics hardware expected
- 2.3.7 OEM integration may ultimately lead to the widespread uptake of video
- 2.3.8 Artificial intelligence and machine vision capabilities become table stakes

3 Company Profiles and Strategies

- 3.1 Video telematics solution providers
 - 3.1.1 Bendix
 - 3.1.2 CameraMatics
 - 3.1.3 Exeros Technologies
 - 3.1.4 Fastview 360
 - 3.1.5 FleetCam
 - 3.1.6 iCAM Video Telematics
 - 3.1.7 Idrive
 - 3.1.8 LightMetrics
 - 3.1.9 Lytx
 - 3.1.10 Nauto
 - 3.1.11 Netradyne
 - 3.1.12 Seeing Machines
 - 3.1.13 SureCam
 - 3.1.14 Vision Techniques
 - 3.1.15 VisionTrack

- 3.1.6 VUE (Radius Telematics)
- 3.1.17 Waylens
- 3.2 Fleet telematics solution providers
 - 3.2.1 AddSecure Smart Transport
 - 3.2.2 Azuga (Bridgestone)
 - 3.2.3 Forward Thinking Systems
 - 3.2.4 ISAAC Instruments
 - 3.2.5 J. J. Keller
 - 3.2.6 Matrix iQ
 - 3.2.7 Microlise
 - 3.2.8 MiX Telematics
 - 3.2.9 Motive
 - 3.2.10 Radius Telematics
 - 3.2.11 Samsara
 - 3.2.12 Sensata INSIGHTS
 - 3.2.13 Solera Fleet Solutions
 - 3.2.14 Trakm8
 - 3.2.15 Trimble
 - 3.2.16 Verizon Connect
- 3.3 Hardware-focused suppliers
 - 3.3.1 D-TEG
 - 3.3.2 Howen
 - 3.3.3 Micronet
 - 3.3.4 Pittasoft (BlackVue)
 - 3.3.5 Positioning Universal
 - 3.3.6 Streamax
 - 3.3.7 Teltonika

Glossary

This report answers the following questions

- What different types of players are involved in the video telematics value chain?
- Which are the major specialised providers of video telematics solutions?
- What offerings are available from the general fleet management solution providers?
- How are the hardware-focused suppliers approaching the market?
- Which are the frontrunning geographic markets for video telematics solutions so far?
- What are the price levels for video telematics hardware and software?
- Which trends and drivers are shaping the market?
- How will the video telematics industry 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.



TRANSPORT & LOGISTICS

The Video Telematics Market

PUBLISHED DATE	April 2023
AUTHOR	Rickard Andersson

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 read this report?

The Video Telematics Market is the foremost source of information about this fast-growing application area in the transportation sector. Whether you are a telematics vendor, video specialist, vehicle manufacturer, telecom operator, investor, consultant, or government agency, you will gain valuable insights from our in-depth research.

AUTHOR

Rickard Andersson

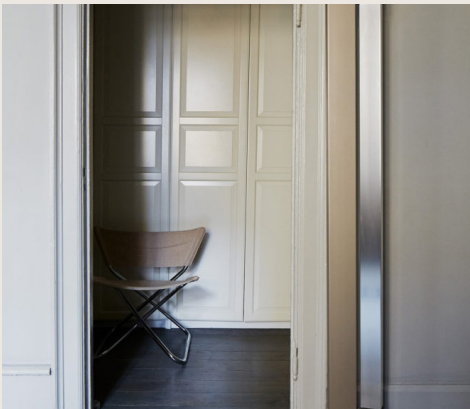


Rickard is a principal analyst with more than 10 years' experience in market research and advisory in the commercial telematics industry. His key areas of expertise include on-road and off-road fleet telematics including video telematics. Rickard has published research on various telematics topics including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

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.