



The Motor-Powered Two-Wheeler Telematics Market

2nd Edition

The Motor-Powered Two-Wheeler Telematics Market is a comprehensive report from Berg Insight analysing the latest developments on the connected motorcycle, scooter and moped market worldwide. This strategic research report from Berg Insight provides you with 85 pages of unique business intelligence including 5-year industry forecasts and expert commentary on which to base your business decisions.

The number of connected motorcycles, scooters and mopeds to reach 90.5 million units worldwide in 2029

Telematics is a broad term that may be applied to a wide range of vehicle connectivity solutions. Berg Insight’s definition of a telematics system is an automatic system designed for any motor-powered two-wheeler that incorporates some form of cellular communications. This report focuses on both aftermarket and OEM embedded telematics solutions for motor-powered two-wheelers including motorcycles, mopeds and scooters. OEM embedded telematics solutions are installed at the factory-level and are managed by the OEMs. Aftermarket solutions are retro-fitted and usually managed by third-party companies.

The adoption of telematics in the two-wheeler industry has recently begun to pick up speed but only a few of the largest two-wheeler OEMs offer embedded telematics services today. Most major motorcycle OEMs have begun to consider including embedded telematics systems and many will likely introduce such offerings in the future. Important drivers for telematics include safety and security services such as emergency and roadside assistance services and stolen vehicle tracking solutions. The increasing interest in electric two-wheelers is also a major catalyst for telematics adoption. At the end of 2024, an estimated 16.7 million active two-wheeler OEM telematics systems were in use globally. Growing at a CAGR of 29.0 percent, this number is expected to reach 59.7 million in 2029. Annual shipments of OEM telematics systems are expected to reach 24.9 million by 2029, up from 8.3 million in 2024. This represents a CAGR of 24.4 percent. Examples of two-wheeler OEMs that offer embedded telematics services today include BMW Motorrad in Europe, LiveWire and Zero Motorcycles in the US, Hero MotoCorp, TVS Motor, Chetak (Bajaj Auto) and Royal Enfield in India as well as Yadea, NIU Technologies, Segway-Ninebot and Sunra in China.

The penetration rate of embedded OEM telematics solutions will increase in the coming years, but there will still be plenty of opportunities for aftermarket telematics service providers. The number of aftermarket two-wheeler telematics systems in active use is forecasted to grow from 17.2 million at the end of 2024 to reach 30.8 million in 2029. This represents a CAGR of 12.3 percent. The Asia-Pacific region accounts for the largest number of active telematics systems followed by RoW including regions such as Africa, the Middle East and Latin America. Annual shipments of aftermarket two-wheeler

telematics systems are expected to grow at a CAGR of 12.1 percent from 5.8 million in 2024 to 10.2 million in 2029.

Suppliers to OEM telematics programs include tier 1 automotive firms and specialised TSPs. Companies like Actia, Bosch, Cerence AI, Continental, Harman, Panasonic and Sibros leverage their automotive capabilities to also serve the two-wheeler segment. TSPs such as Ajjas, iTriangle Infotech and Trak N Tell provide hardware and software services to two-wheeler OEMs in the Indian market. Tier 1 suppliers traditionally focused on the automotive industry are gradually entering the two-wheeler OEM telematics sector. Their approach has been relatively cautious, with some initial initiatives underway. Many tier 1 suppliers focus on infotainment clusters without embedded connectivity, such as smartphone integration solutions.

The two-wheeler aftermarket telematics segment is served by a variety of companies including large firms with significant installed bases across various vehicle types and those specialising in two-wheeler solutions. Examples of two-wheeler telematics service providers include Mapit IoT, Trackting, GeoRide, Monimoto, Sizzapp and Scorpion Automotive from Europe; SVR Tracking and Find it Now from North America; Carsystem and Strix from South America; Ajjas, Fleettrack, iTriangle Infotech, Onelap Telematics and Trak N Tell from India; WanWayTech from China as well as Tracker Connect from South Africa. There are also a range of companies focusing on developing hardware telematics devices. Examples of such companies include ERM Advanced Telematics, Jimi IoT, Positioning Universal, Queclink Wireless Solutions, Teltonika and Tramigo.

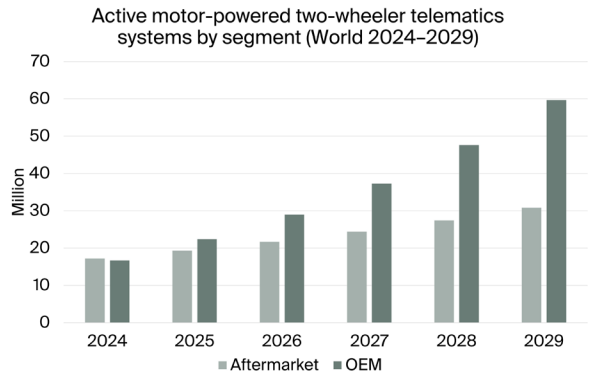


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Glossary

Highlights from the report

Insights from numerous interviews with market leading companies.

New data on two-wheeler populations and new registrations worldwide.

Descriptions of two-wheeler telematics systems and associated concepts.

Case studies of 24 two-wheeler OEM telematics offerings.

Detailed profiles of 31 two-wheeler telematics technology and service providers.

In-depth analysis of market trends and key developments.

Market forecasts by region and segment lasting until 2029.

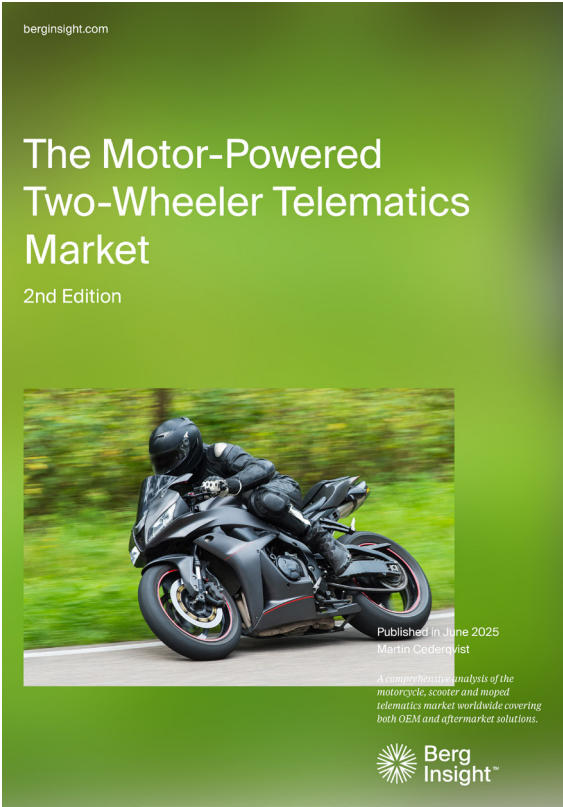
The report answers the following questions

- What is the current status of the two-wheeler OEM telematics industry?
- Which are the key two-wheeler telematics applications?
- What telematics offerings are available from the leading two-wheeler OEMs today?
- What business models are used by two-wheeler OEMs?
- What types of aftermarket telematics products are offered on the market?
- What are the future applications for two-wheeler telematics?
- Which are the key future trends in this industry?
- How will the market evolve in Europe, North America, Asia-Pacific and RoW?



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The Motor-Powered Two-Wheeler Telematics Market

What are the latest trends on the connected motorcycle, scooter and moped market worldwide? At the end of 2024, an estimated 16.7 million active motor-powered two-wheeler OEM telematics systems and 17.2 million aftermarket telematics systems were in use globally. The addressable market is large as there were about 888 million registered motorcycles, scooters and mopeds at the end of 2023. Get up to date with the latest industry trends in this new 85-page report.

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Who should read this report?

The Motor-Powered Two-Wheeler Telematics Market is the foremost source of information about the rapid adoption of two-wheeler telematics. Whether you are a vehicle OEM, telematics service provider, telecom operator, investor, consultant, or government agency, you will gain valuable insights from our in-depth research.

AUTHOR

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Martin is an IoT analyst covering mainly the automotive sector. 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 holds a Master's degree in Industrial Engineering and Management from Chalmers University of Technology and joined Berg Insight in 2022.

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