



# The Global Aftermarket Vehicle Telematics Hardware Market

4th Edition

*The Global Aftermarket Vehicle Telematics Hardware Market is a strategy report from Berg Insight covering the aftermarket segment for passenger cars and commercial vehicles. 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.*

# Shipments of aftermarket telematics hardware reached 51.2 million units in 2024

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 in this report is an automatic system designed for passenger cars and commercial vehicles that incorporates some form of cellular/GNSS or RF communications technology. All of the world's leading carmakers have now launched mass-market connectivity services in key regions. The OEM initiatives can be seen as competition for aftermarket solutions, but there is still a growing demand for different forms of aftermarket telematics services. The addressable market for aftermarket telematics solutions is significant. At the end of 2024, an estimated 1.6 billion vehicles were registered worldwide. Berg Insight has found that 51.2 million aftermarket telematics hardware devices were sold globally during 2024 for a total market value of approximately € 2.4 billion. Europe, North America and China were the largest markets, achieving shipments of about 12.2 million, 11.7 million and 10.6 million in 2024. Berg Insight forecasts that global shipments of aftermarket telematics devices will grow at a compound annual growth rate (CAGR) of 8.6 percent in the next five years to reach 77.5 million in 2029. Revenues from sales of aftermarket telematics devices are forecasted to grow from € 2.4 billion in 2024 to € 3.5 billion in 2029, representing a CAGR of 7.6 percent.

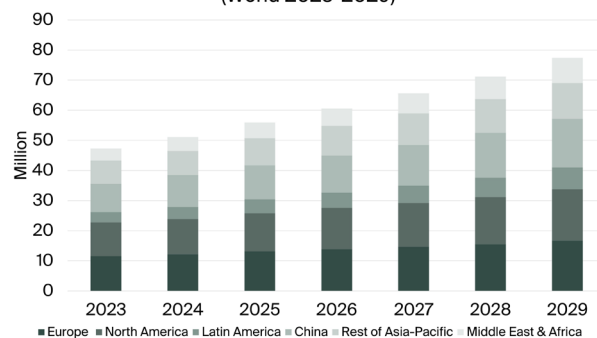
The leading telematics hardware vendors generally have an international market focus and offer products for both passenger cars and commercial vehicle applications. These players often have a number of distribution channels, ranging from direct sales to end-users to indirect sales via fleet management and other aftermarket telematics service providers, system integrators or OEMs. Direct sales remain a principal distribution model to larger clients, while indirect channels are common for distributing solutions to smaller clients. Partnering with resellers is furthermore common when solution providers expand to new geographical markets.

Teltonika was the market leader in terms of aftermarket vehicle telematics hardware sales with a market share of about 7.1 percent, reaching annual sales of € 170 million

in 2024. Jimi IoT was the runner-up with a market share of 4.9 percent. Additional top players include Queclink, Xirgo and BSJ Technology. Queclink ranked third in terms of sales with a market share of about 2.9 percent while Xirgo and BSJ technology ranked fourth and fifth with market shares of roughly 2.3 percent and 2.2 percent respectively. Notable vendors further include ERM Advanced Telematics from Israel; CalAmp, Positioning Universal and Danlaw from North America; ST SUNLAB, Gosuncn RichLink, TOPFLYtech, Neoway Technology, Coban Electronics, Sinotrack, iTriangle, GoSafe, Sinocastel and ATrack from Asia-Pacific; and Ruptela from Europe.

Some telematics service providers are vertically integrated companies with activities spanning hardware design, software development, marketing, sales, project implementation and system operation. Contract manufacturers are commonly used as opposed to in-house production. Examples of vertically integrated companies include Geotab, Webfleet and Samsara in the fleet management market. Leading aftermarket telematics service providers in the aftermarket dealer and vehicle finance space that design and develop telematics hardware in-house include Procon Analytics, Spireon, Vodafone Automotive and PassTime GPS.

Shipments of aftermarket vehicle telematics devices (World 2023-2029)



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## Glossary

## Highlights from the report

- Insights** from 30 new executive interviews with market leading companies.
- Comprehensive overview** of the vehicle telematics hardware value chain and key applications.
- In-depth analysis** of market trends and key developments.
- New profiles** of 83 aftermarket vehicle telematics hardware vendors.
- Summary** of the involvement of vehicle OEMs, mobile operators and IT companies.
- New data** on vehicle populations and new vehicle registrations worldwide.
- Market forecasts** by region lasting until 2029.

## The report answers the following questions

- Which are the leading providers of aftermarket telematics devices?
- Which are the dominant technology form factors?
- Which are the drivers and barriers on the global vehicle telematics hardware market?
- How will the global vehicle telematics hardware market evolve over the next five years?
- How will the market evolve in Europe, North America, Latin America, Asia-Pacific and MEA?
- Will OEM telematics solutions outcompete aftermarket vehicle telematics in the long term?
- 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 80 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

# The Global Aftermarket Vehicle Telematics Hardware Market

This report focuses on the hardware part of the connected vehicle value chain, including device form factors such as blackboxes and OBD dongles. Berg Insight estimates that total shipments of aftermarket telematics devices reached 51.2 million units worldwide in 2024. Growing at a compound annual growth rate of 8.6 percent, shipments are expected to reach 77.5 million units in 2029. The report covers the aftermarket segment for passenger cars and commercial vehicles. Get up to date with the latest industry trends in this new 130-page strategy report from Berg Insight.

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## Who should read this report?

The **The Global Aftermarket Vehicle Telematics Hardware Market** is the foremost source of information about the passenger car and commercial vehicle telematics hardware market for aftermarket installation. Whether you are a telematics hardware vendor, vehicle telematics service provider, vehicle manufacturer, telecom operator, investor, consultant, or government agency, you will gain valuable insights from our in-depth research.

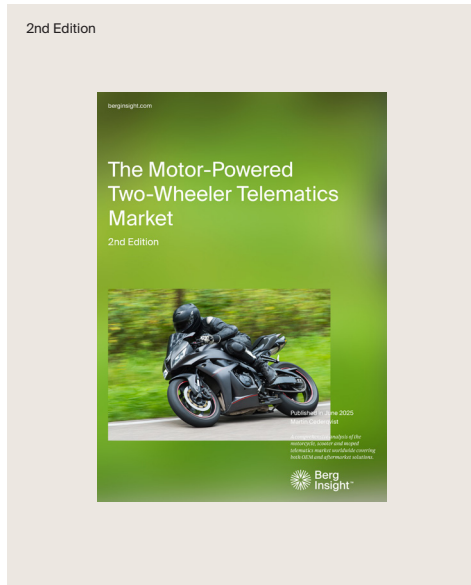
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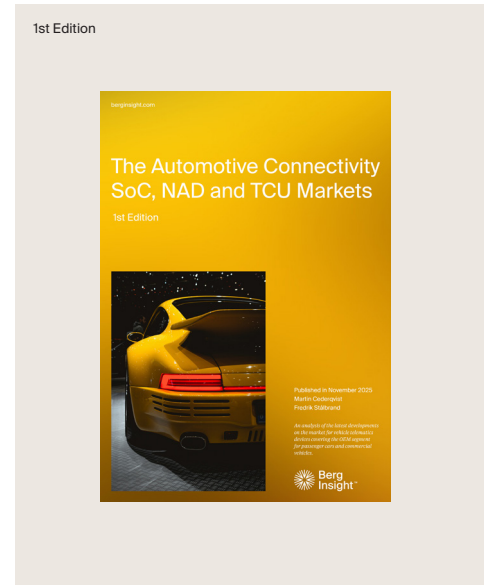
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