Aftermarket Car Telematics

6th Edition

Aftermarket Car Telematics is the sixth consecutive report from Berg Insight analysing the latest developments on the market for applications such as stolen vehicle tracking（SVT), vehicle diagnostics, usage-based insurance, Wi-Fi hotspot, roadside assistance and convenience applications targeting consumers and businesses. This strategic research report from Berg Insight provides you with 180 pages of unique business intelligence including 5-year industry forecasts and expert commentary on which to base your business decisions.

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The installed base of aftermarket car telematics devices reached 90 million in 2024

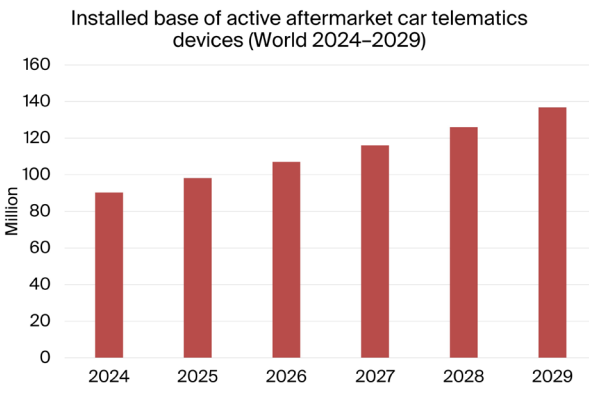
Telematics is a broad term that may be applied to a wide range of automotive connectivity solutions. Berg Insight's definition of an aftermarket car telematics solution in this report includes telematics devices created by a company other than the carmakers and are retrofitted into cars mainly via OBD-II and blackbox devices based on both cellular/GNSS and RF technology. The connected car is a major trend in the automotive industry and virtually all of the world's leading carmakers have launched mass-market services in key regions. The OEM initiatives can be seen as competition for the aftermarket solutions, but there is still a growing demand for different forms of aftermarket car telematics services. Aftermarket telematics still has a dominant position in the market in many parts of the world. Several categories of aftermarket car telematics applications have become popular including roadside assistance, stolen vehicle tracking (SVT), vehicle diagnostics, usage-based insurance, dealer and inventory management, Wi-Fi hotspot as well as other convenience applications targeting consumers.

The addressable market for aftermarket car telematics solutions is significant. At the end of 2024, there were an estimated 1.4 billion passenger cars and light trucks registered worldwide. Even though aftermarket car telematics services face competition from smartphone-only solutions and OEM solutions, Berg Insight is of the opinion that the aftermarket car telematics market is still in a growth phase. Berg Insight estimates that total shipments of aftermarket car telematics systems reached 26.5 million units worldwide in 2024. Growing at a compound annual growth rate of 8.2 percent, shipments are expected to reach 39.3 million units in 2029. The number of aftermarket car telematics systems in active use is forecasted to grow at a compound annual growth rate of 8.7 percent from 90.3 million in 2024 to 136.8 million worldwide in 2029. The penetration rate will at the same time grow from 6.3 percent in 2024 to 8.5 percent at the end of the forecast period.

The market is characterised by a great diversity of players interacting in a complex value chain that spans multiple industries. The car telematics companies targeting the aftermarket car sector include specialists focusing on this application area only as well as general telematics players that serve a broad range of applications including also for example fleet management for commercial vehicles. The leading aftermarket car telematics solution providers have reached installed bases in the millions. Leading car telematics solution vendors include OCTO Telematics, Procon Analytics, StarLine, Spireon, Targa Telematics, Vodafone Automotive, Ituran, PassTime GPS, Tracker Connect Maxtrack, Carsystem, SVR Tracking and Cognosos. The most common go-to-market strategy is to partner with insurance companies, dealers, OEMs, MNOs and vehicle finance companies. Leading companies delivering telematics hardware and related services to the aftermarket car telematics market include Teltonika, Jimi IoT, Queclink, ERM Advanced Telematics, Xirgo, BSJ Technology, Positioning Universal, Danlaw, ST SUNLAB, Gosuncn RichLink, Ruptela and Munic.

Stolen vehicle recovery and security-related telematics applications are mature aftermarket car telematics applications. Regional market conditions such as a high level of vehicle crime influence the demand for stolen vehicle tracking and have made SVT solutions popular in countries such as Brazil, Argentina, China, Israel, Russia and South Africa. Vehicle theft has increased in recent years in many countries. For example, there were thefts of about 0.9 million motor vehicles in the US in 2024 according to the National Insurance Crime Bureau (NICB). Berg Insight forecasts that the number of active aftermarket SVT units in use worldwide will reach 103.4 million in 2029, up from 67.0 million at year-end 2024.

Telematics has become an important part of the aftersales programmes of dealers and vehicle finance companies, enabling remote diagnostics and direct communication with drivers. There is a tremendous opportunity to turn a reactive way of managing customers into a proactive process by integrating CRM solutions, using data from cars intelligently. Collecting data from the fleet on the lot is also valuable for dealers in order to for example collect information about faulty components and software bugs as well as battery status. Direct-to-consumer car telematics offerings are available to varying degrees in many regions by companies such as Verizon, Mojio, Varroc Connect, Tail Light (Bouncie), Agnik (Vyncs), Net4Things, Air, LandAirSea, Uffizio (Trakzee Mini), Comodif and Protectus Technologies (CarLock). Many direct-to-consumer car telematics providers have broadened their product portfolios to include additional telematics application areas such as fleet management as well as powering B2B2C telematics services.



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Insights from 30 new executive interviews with market leading companies.

Comprehensive overview of the aftermarket car telematics value chain and key applications.

In-depth analysis of market trends and key developments.

New profiles of 93 aftermarket car telematics solution providers.

Summary of the involvement of vehicle OEMs and mobile operators.

New data on car populations and new car registrations worldwide.

Market forecasts by region lasting until 2029.

The report answers the following questions

- What types of aftermarket car telematics products are offered on the market?
- Which are the leading providers of aftermarket car telematics technology?
- What business models are available for players entering the car telematics space?
- Which are the dominant technology form factors?
- How will the market evolve in Europe, North America, Latin America, Asia-Pacific and MEA?
- How are mobile operators approaching the aftermarket car telematics market?
- Will car OEM telematics solutions outcompete aftermarket car telematics in the long term?
- Which are the major drivers and barriers for car telematics adoption?
- 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.

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Aftermarket Car Telematics

What are the latest trends and business opportunities for aftermarket car telematics? Berg Insight estimates that total shipments of aftermarket car telematics systems reached 26.5 million units worldwide in 2024. Growing at a compound annual growth rate of 8.2 percent, shipments are expected to reach 39.3 million units in 2029. The aftermarket car telematics applications covered in the report include stolen vehicle tracking, roadside assistance, vehicle diagnostics, Wi-Fi hotspot and various convenience applications. Get up to date with the latest industry trends in this new 180-page strategy report from Berg Insight.

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PDF & EXCEL: 2–10 user license	€ 2 250
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Who should read this report?

Aftermarket Car Telematics is the foremost source of information about the adoption of car telematics for consumers. Whether you are a telematics vendor, insurance company, vehicle manufacturer, 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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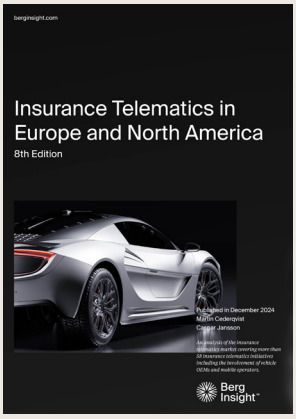

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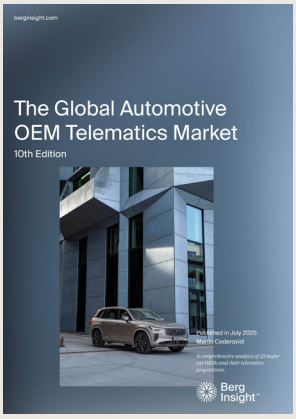

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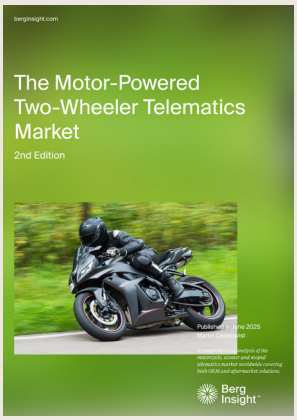

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