



The Railway Telematics Market

2nd Edition

The Railway Telematics Market is a strategy report from Berg Insight analysing the latest developments on the rolling stock tracking and monitoring market worldwide. This strategic research report from Berg Insight provides you with 120 pages of unique business intelligence including 5-year industry forecasts and expert commentary on which to base your business decisions.

The installed base of tracking devices for rail freight wagons to reach 1.4 million by 2030

Since the mid-nineteenth century, railways have played a central role in supporting economic growth across the Western world. In recent decades, however, rail's share of freight transport has declined in North America and several European countries, while road transport has increased its share due to its greater flexibility and shorter delivery times. Despite this shift, rail transport offers a range of advantages that are becoming increasingly valued. Rail is significantly more energy-efficient than road transport and can produce up to six times fewer greenhouse gas emissions per tonne-kilometre. Shifting more passenger and freight traffic from road to rail will therefore be an important part of meeting long-term sustainability targets.

To compete more effectively with road and other transport modes, the rail industry must adopt solutions that enhance efficiency and reliability. Digitalisation is widely regarded as a critical step in achieving this goal. A key digitalisation initiative in the rail freight sector involves equipping wagons and locomotives with telematics devices and sensors. Using GPS and cellular or satellite communication technologies, these devices collect and transmit data on the location and condition of rolling stock to back-end servers and cloud-based platforms in real time. By accessing this data through an intuitive user interface, rolling stock operators and fleet owners can increase operational efficiency, reduce maintenance and service costs and improve service levels.

This report covers telematics and monitoring solutions for rolling stock, including locomotives, multiple units, passenger coaches and freight wagons. The main focus is on conventional railways, covering freight, commuter, regional, intercity and high-speed rail, rather than metro, light rail, monorail and tram systems. The scope excludes solutions for rail infrastructure, such as signalling systems, switches and other trackside systems.

There is a fundamental difference between telematics solutions developed for powered rail vehicles, such as locomotives and multiple units, and those developed for unpowered assets, such as freight wagons. Devices for unpowered assets require long-lasting batteries and are often complemented by solar panels to enable extended operation. Devices installed on powered rail vehicles can draw power from the train's existing electrical system and are therefore less power-constrained. Differences in safety regulations and operational requirements between freight and passenger rail also influence the railway telematics market. As a result, the market is largely divided between companies offering solutions for freight wagons and those providing solutions for locomotives and multiple units. Modern locomotives and passenger trains typically include some form of tracking and monitoring technology as standard.

Large OEMs such as Alstom, Siemens Mobility, CAF, Hitachi Rail and Stadler Rail develop connected solutions for their own trains. In addition, several specialist telematics and on-board train technology companies provide aftermarket hardware and software for remotely monitoring the location and condition of locomotives and multiple units. Companies in this category include European vendors such as EKE-Electronics, HaslerRail, Nomad Digital and Railnova, as well as North American vendors such as Railhead, Wi-Tronix, Quester Tangent and ZTR Control Systems.

Tracking solutions for rail freight wagons are provided primarily by specialist telematics companies offering aftermarket systems. Leading providers in this segment include European companies such as Nexxiot, DOT Telematik and Systemtechnik, SAVVY Telematic Systems, Intermodal Telematics, Level Systems, Giesecke+Devrient and Cargomon Systems, as well as North American companies such as Amsted Rail and BlackBerry.

The market for real-time tracking solutions for locomotives, multiple units and rail wagons is expected to continue to grow in the next years. Interest in railway telematics is increasing as stakeholders across the rail transport industry gain a better understanding of the operational benefits associated with remote monitoring solutions. However, adoption is progressing gradually due to investment constraints, long procurement cycles and varying levels of digital maturity among rail operators and fleet owners. The installed base of tracking devices on rail freight wagons reached 875,000 units worldwide at the end of 2025. By the end of 2030, the installed base is forecasted to reach nearly 1.4 million units. Annual shipments are estimated to grow from 175,000 units in 2025 to around 350,000 units in 2030. Globally, the penetration of tracking devices within the rail freight wagon segment reached 16.6 percent at the end of 2025. This figure is estimated to reach 24.5 percent at the end of 2030.

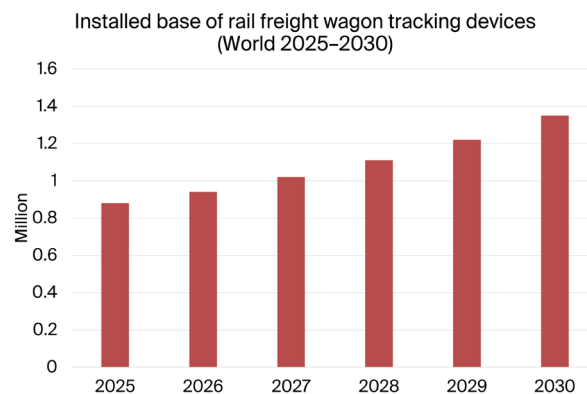


Table of contents

Executive Summary

1 Freight and Passenger Transport Overview

1.1 Freight transport

1.1.1 International trade

1.1.2 Cargo-carrying units

1.2 Passenger transport

2 The Railway Industry

2.1 Overview

2.1.1 Rolling stock

2.1.2 Fleet of locomotives, MUs, passenger coaches and rail freight wagons

2.2 North America

2.3 Europe

2.4 Rest of the World

3 Rolling Stock Telematics Solutions

3.1 Solution infrastructure

3.1.1 Device segment

3.1.2 Network segment

3.1.3 Positioning segment

3.1.4 Service segment

3.2 Benefits of connected rolling stock solutions

3.2.1 Fleet management and predictive maintenance

3.2.2 Operational efficiency

3.2.3 Supply chain management

3.2.4 Security management

4 Market Forecasts and Analysis

4.1 Market forecasts

4.2 Vendor market shares

4.3 Value chain analysis

4.3.1 Telematics providers and specialised hardware and software companies

4.3.2 Rolling stock OEMs and OE suppliers

4.3.3 Railway operators and fleet owners

4.4 Market drivers and trends

4.4.1 Greater sustainability and environmental awareness benefit the rail industry

4.4.2 RailPulse to accelerate rail freight wagon telematics adoption in North America

4.4.3 Ageing fleet of railcars and locomotives

4.4.4 Predictive maintenance reduces the risk of costly accidents

4.4.5 Replacing GSM-R with FRMCS will enable a range of new applications

4.4.6 DAC to change the market dynamics for rail freight wagon tracking in Europe

5 Company Profiles and Strategies

5.1 Rolling stock OEMs and OE suppliers

5.1.1 Alstom

5.1.2 Amsted Rail

5.1.3 CAF

5.1.4 Hitachi Rail

5.1.5 Knorr-Bremse

5.1.6 Pesa

5.1.7 Progress Rail (Caterpillar)

5.1.8 Siemens Mobility

5.1.9 SKF

5.1.10 Stadler Rail

5.1.11 Talgo

5.1.12 Tatravagónka

5.1.13 The Greenbrier Companies

5.1.14 Trinity Industries

5.1.15 Wabtec

5.1.16 ZF

5.2 Aftermarket telematics solution providers

5.2.1 3C Telemetry

5.2.2 BlackBerry

5.2.3 Cargomon Systems

5.2.4 Cognid Telematik

5.2.5 DOT Telematik und Systemtechnik

5.2.6 EKE-Electronics

5.2.7 ELTE Group

5.2.8 Franz Kaminski Waggonbau

5.2.9 Geoforce

5.2.10 Giesecke+Devrient

5.2.11 HaslerRail

5.2.12 Hum Industrial Technology

5.2.13 Icomera

5.2.14 Intermodal Telematics

5.2.15 Level Systems

5.2.16 Nexxiot

5.2.17 Nomad Digital (Alstom)

5.2.18 NRail

5.2.19 ORBCOMM

5.2.20 PJM

5.2.21 Quester Tangent

5.2.22 Railhead

5.2.23 Railnova (Knorr-Bremse)

5.2.24 Railway Metrics and Dynamics

5.2.25 SAVVY Telematic Systems

5.2.26 Televic

5.2.27 Transmission Dynamics

5.2.28 Tri-Logical Technologies

5.2.29 Ubidata

5.2.30 Wi-Tronix

5.2.31 ZTR Control Systems

5.3 Hardware providers

5.3.1 Belden

5.3.2 Cisco

5.3.3 Duagon (Knorr-Bremse)

5.3.4 Ependion

5.3.5 Huber+Suhner

5.3.6 Kontron

5.3.7 Moxa

Glossary

Highlights from the report

Insights from 30 executive interviews with market leading companies.

Comprehensive overview of the railway telematics value chain and key applications.

In-depth analysis of market trends and key developments.

Summary of 16 leading rolling stock OEM and OE supplier telematics strategies.

Profiles of 31 aftermarket telematics solution providers.

Detailed forecasts on rail freight wagon device shipments, installed base, penetration rate and market value lasting until 2030.

This report answers the following questions

- Which are the leading providers of rolling stock telematics solutions?
- What offerings are available from device vendors and service providers?
- Who are the main customers of rolling stock telematics solutions?
- What are the key drivers behind the digitalisation of the railway industry?
- What are the main barriers to widespread adoption of rolling stock telematics solutions?
- What impact will RailPulse have on the North American rail freight industry?
- How will the railway telematics industry evolve?
- What are the future trends in this market?



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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 85 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 Railway Telematics Market

This study investigates the market for telematics solutions used for tracking the location and condition of rolling stock, including locomotives, multiple units and wagons. The total market value for rail freight wagon telematics solutions, including revenues generated from the sales of hardware, software and services by solution providers, is estimated to have reached € 205 million in 2025. The market value is forecasted to grow at a CAGR of 10.6 percent to reach € 340 million in 2030. Get up to date with the latest information about vendors, products and markets.

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Who should read this report?

The **The Railway Telematics Market** is the foremost source of information about the adoption of tracking and monitoring solutions for rolling stock. Whether you are a device developer, solution provider, logistics service provider, telecom operator, investor, consultant, or government agency, you will gain valuable insights from our in-depth research.

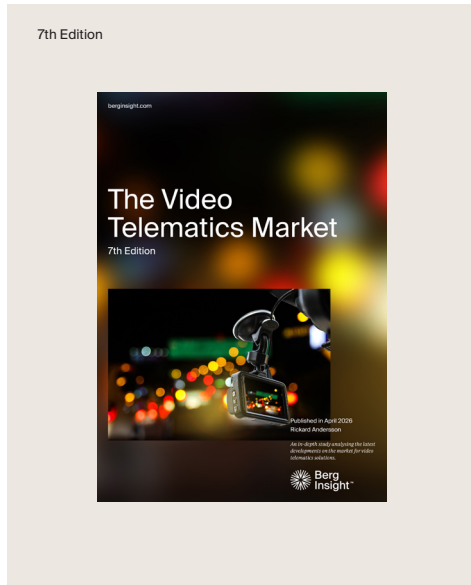
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