The Global Construction Equipment OEM Telematics Market

The Global Construction Equipment OEM Telematics Market is the third consecutive report from Berg Insight analysing the latest developments on the market for OEM-provided construction equipment telematics systems.

This strategic research report from Berg Insight provides you with 140 pages of unique business intelligence including 5-year industry forecasts and expert commentary on which to base your business decisions.

Highlights from this report:

- **Insights** from numerous interviews with market-leading companies.
- **New data** on construction equipment sales and market shares.
- **Comprehensive overview** of the construction equipment telematics value chain and key applications.
- **In-depth analysis** of market trends and key developments.
- **Updated profiles** of 25 construction equipment OEMs and their telematics offerings.
- **Market forecasts** by region lasting until 2024.

Berg Insight forecasts 6.9 million active construction equipment OEM telematics systems by 2024

Berg Insight has found that the global installed base of active construction equipment OEM telematics systems reached almost 3.4 million units in 2019. Growing at a compound annual growth rate (CAGR) of 15.6 percent, the active installed base is forecasted to reach 6.9 million units worldwide in 2024. This includes all CE telematics systems marketed by construction equipment OEMs, either developed in-house or provided by the CE manufacturers in partnership with third-party telematics players. The North American market accounted for around 0.7 million active construction equipment OEM telematics systems at the end of 2019. The European market is estimated to be slightly larger than the North American. The Rest of World moreover represents more than half of the global installed base of CE telematics systems provided by construction equipment OEMs.

Most major construction equipment OEMs have introduced telematics offerings for their customers either independently or in collaboration with telematics partners. OEM telematics systems are today commonly factory-installed as standard at least for heavier machines. Berg Insight ranks Caterpillar and Komatsu as the leading construction equipment OEMs in terms of the number of CE telematics systems deployed worldwide. Based in the US and Japan respectively, the two companies are also by far the leading construction equipment manufacturers in terms of market share. Caterpillar has now reached the milestone of 1 million connected assets across all segments. Caterpillar's largest markets for its telematics offerings are North America and Europe while Komatsu has the largest share of its telematics units in Japan and China followed by North America and Europe. The remaining top-5 players include UK-based JCB, Japan-based Hitachi Construction Machinery and China-based SANY which all have hundreds of thousands of active units. Sweden-based Volvo Construction Equipment also has an installed base in the hundreds of thousands. Other notable OEMs offering CE telematics solutions include Deere & Company and Doosan Infracore which are based in the US and South Korea respectively. Additional players having installed bases of construction equipment telematics units in the tens of thousands include Liebherr, CNH Industrial, Hyundai Construction Equipment, Tadano and JLG Industries.

Berg Insight's M2M Research Series

What are the key business opportunities in the emerging wireless M2M/IoT market? Berg Insight's M2M Research Series is a unique series of 40 market reports published on a regular basis. Each title offers detailed analysis of a specific vertical application area such as smart homes, smart metering, fleet management and car telematics, or covers horizontal topics including IoT platforms, software, hardware, IoT connectivity statistics and the mobile operators' IoT strategies.

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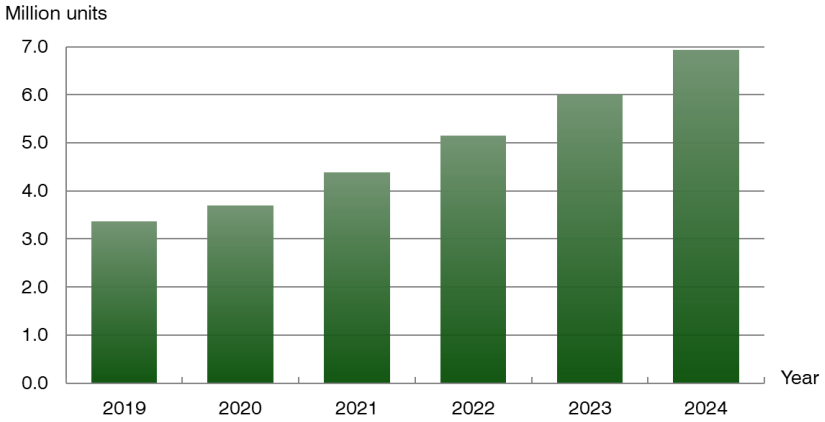
This report answers the following questions:

- Which are the main telematics systems offered by construction equipment manufacturers?
- Which are the key construction equipment telematics applications?
- What business models are used by OEMs offering telematics?
- Which construction equipment manufacturers have developed their telematics offerings in-house?
- Which OEM telematics offerings are powered by telematics partners?
- How does the construction equipment OEM telematics market compare with other commercial telematics markets?
- Are there regional variations on the global market for construction equipment telematics?
- How will the construction equipment OEM telematics market evolve in the future?



Installed base of active construction equipment OEM telematics units (World 2019–2024)

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Who should buy this report?

The Global Construction Equipment OEM Telematics Market is the foremost source of information about the market for OEM-provided construction equipment telematics systems. Whether you are an equipment manufacturer, telematics vendor, telecom operator, investor, consultant, or government agency, you will gain valuable insights from our in-depth research.

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