Container Tracking and Security

Container Tracking and Security is the second consecutive report from Berg Insight analysing the latest developments on the container tracking and security 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.

**Highlights from the report:**

- **Insights** from 35 new executive interviews with market leading companies.
- **Comprehensive** overview of the container tracking value chain and key applications.
- **In-depth** analysis of market trends and key developments.
- **Summary** of major container tracking initiatives from the EU and the US.
- **Updated** profiles of 50 container tracking solution providers.
- **Market** forecasts lasting until 2017.

**Berg Insight’s M2M Research Series**

What are the key business opportunities in the emerging wireless M2M market? Berg Insight’s M2M Research Series is a unique series of market reports published on a quarterly basis. Each title offers detailed analysis of a specific vertical application area such as smart metering, fleet management or vehicle telematics. Once per year we also publish summaries of our research with detailed forecasts for the Global and European wireless M2M markets, respectively.

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The installed base of container tracking systems will sevenfold over the next 5 years

Shipping container tracking is a subset of asset tracking and aims at securing assets and increase operational efficiency. Berg Insight’s definition of a real-time container tracking solution is a system that incorporates data logging, satellite positioning and data communication to a backoffice application. Tracking and monitoring of shipping containers came in focus after 9/11. Many companies saw an opportunity and started ambitious container tracking projects. However, neither the technology nor the market was ready at the time. Today, mobile and satellite networks can provide ubiquitous online connectivity at a reasonable cost and mobile computing and sensor technology delivers high performance, as well as excellent usability. All of these components combined enable the delivery of supply chain management, security management and operations management applications linking containers and enterprise IT systems.

Intermodal shipping containers are standardised, reusable containers used in intermodal transport systems worldwide. Container trade is the fastest growing segment in seaborne trade, having grown nearly 10 percent annually since the 1980s. Maritime transportation and the increased containerisation of goods are key enablers to make the global supply chain work efficiently. Today, more than 80 percent of international trade goods are carried by sea. At the end of 2012, there were over 20 million cargo containers worldwide, the equivalent of 32.5 million TEU.

Berg Insight is of the opinion that the market for shipping container tracking solutions has entered a growth period that will last for several years to come. The number of tracking systems with GPRS or satellite communication for intermodal containers in active use is forecasted to grow at a compound annual growth rate of 49.1 percent from 137,000 units at the end of 2012 to 1.0 million by 2017. The penetration rate of remote tracking systems in the total population of intermodal containers is estimated to increase from 0.7 percent in 2012 to 4.1 percent in 2017. Aftermarket solutions mounted on high value cargo and refrigerated containers will be the first use cases to adopt container tracking.

The satellite communication provider Orbcomm has after the recent acquisitions of StarTrak, PAR LMS and GlobalTrak emerged as the largest vendor of intermodal container tracking solutions featuring GPRS or satellite communication. The company had achieved an installed base of 19,000 units at the end of 2012. Envirotech and Skybitz are the second and third largest providers having 18,000 and 15,000 systems respectively installed on intermodal containers. Omnitrac, Pointer Telocation, Savi Technology and PearTrack Systems all have an installed base of approximately 10,000 units. ID Systems, Honeywell Global Tracking and Kirens Global Security are other major vendors with an installed base of over 5,000 units each. In the recent years, the intermodal container tracking market has attracted wireless M2M communication providers. Several operators including Orbcomm, AT&T, Everything Everywhere, Telenor and Inmarsat (shareholder in SkyWave) have assumed the role of end-to-end solution providers of container and other asset tracking applications.

There has been a consolidation trend in the container tracking market in the past two years with several major M&A activities. Orbcomm acquired StarTrak in May 2011, followed by the acquisition of PAR LMS in December 2011 and GlobalTrak in April 2013. EMS Global Tracking was acquired by Honeywell in August 2011, which formed the new business unit Honeywell Global Tracking. Furthermore, Telular acquired asset tracking specialist SkyBitz for US$ 42 million in December 2011. In April 2012, Emerson acquired the marine container and boiler business of Johnson Controls enabling Emerson to expand its refrigeration technology and solutions offerings in the global transportation sector. In June 2012, FreightWatch International was acquired by Sensitech, a part of United Technology Corporation. Later in September 2012, Lockheed Martin divested Savi Technology to LaSalle Capital. ABB furthermore signed an agreement to acquire APS Technology at the beginning of 2013.

Berg insight anticipates that there will be a continued strong focus on container transport security and increased supply chain visibility in the coming years which will favour the container tracking market. Tracking solutions can help transportation chain stakeholders to comply with regulations and security programs as well as increase the transportation efficiency and decrease the carbon footprint from container transportation. Proving the commercial value, finding efficient solutions for reverse logistics and bringing down hardware prices are key components to increase the adoption rate for container tracking solutions.

This report answers the following questions:

- Which are the leading providers of container tracking solutions?
- What offerings are available from device vendors and service providers?
- What impact will international regulations and security initiatives have on the market?
- What are the key drivers behind the adoption of container tracking devices?
- How is the global economy affecting the market for container tracking?
- What impact will technology advancements have on the market?
- How will the container telematics industry evolve in the future?
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