

# Trailer and Cargo Container Tracking



**Trailer and Cargo Container Tracking** is the third consecutive report from Berg Insight analysing the latest developments on the cargo container tracking and security market worldwide.

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- **Insights** from 35 new executive interviews with market-leading companies.
- **Comprehensive** overview of the real-time cargo tracking value chain and key applications.
- **In-depth** analysis of market trends and key developments.
- **Summary** major cargo tracking initiatives from the EU and the US.
- **Updated** profiles of 68 container tracking solution providers.
- **Detailed** forecasts by market vertical lasting until 2018.



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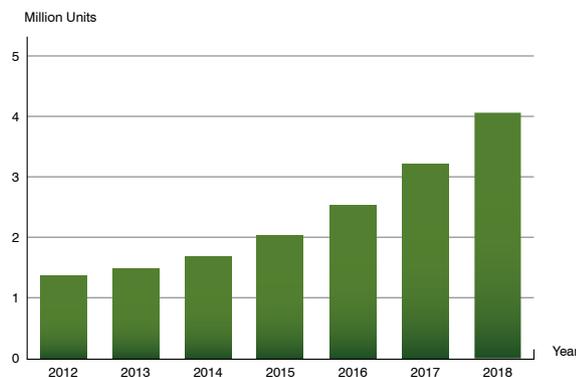


## The cargo telematics market to quadruple in the next 5 years

Trailer and cargo container tracking is a subset of asset tracking and aims to increase operational efficiency and make logistics chains more secure. Berg Insight's definition of a real-time tracking solution is a system that incorporates data logging, satellite positioning and data communication to a backoffice application. Trailer tracking is often a part of a fleet management solution including both the truck and trailer. The history of fleet management solutions goes back several decades while tracking and monitoring of shipping containers came in focus after 9/11. 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 trailers, containers, cargo and enterprise IT systems.

In order to make freight transport efficient, products are packed into logistics units which can remain intact throughout the delivery chain. Smaller logistics units such as boxes and pallets are often grouped into larger units and loaded on semi-trailers, swap-bodies, air freight unit load devices (ULDs) or intermodal shipping containers. These loading units can be applicable to one or more modes of transport. Semi-trailers are mostly used in road transport, swap-bodies can be transferred between road and rail transport, ULDs are used in air freight transport and shipping containers can be carried on several transport modes. At the end of 2013, there were over 20 million intermodal containers and over 15 million trailers and swap bodies worldwide.

Berg Insight estimates that shipments of remote tracking systems with GPRS or satellite communication capabilities for cargo loading units including trailers, swap bodies, intermodal containers, air freight cargo containers, cargo boxes and pallets reached 0.29 million units worldwide in 2013. Growing at a compound annual growth rate of 35.0 percent, the shipments are expected to reach 1.3 million units in 2018. During the same period the installed base of remote tracking systems is forecasted to grow at a compound annual growth rate of 22.3 percent from 1.5 million units at the end of 2013 to 4.1 million units by 2018. Tracking of trailers and swap bodies is the largest market segment and accounted for 80 percent of the total installed base of tracking units ►



Installed base of active trailer and cargo container tracking units (World 2012-2018)

► trailers and cargo containers at the end of 2013. Intermodal container tracking is the second largest segment with an installed base of 190,000 tracking units at the end of 2013.

North America is the most developed region for trailer tracking. The major actors include SkyBitz and Omnitrac that have more than 200,000 units installed each across the US, Canada and Mexico. ID Systems, Orbcomm and Spireon are also important players in this market segment with installed bases ranging from 55,000 to 125,000 units. In Europe, Idem Telematics, Mecomo, Schmitz Cargobull and Novacom Europe are major trailer telematics solution providers with over 20,000 active units each. Orbcomm is the largest provider of intermodal container tracking solutions with an installed base of over 21,000 units at the end of 2013. Envotech, Pointer Telocation, Zenatek and PearTrack Systems are other major actors and these have installed bases of over 10,000 units each. Honeywell Global Tracking, Savi Technology, EPSa and Kirsen Global Security are also prominent vendors with solutions especially developed for tracking and monitoring of intermodal containers. OnAsset Intelligence and Moog are examples of successful actors which have developed specialised solutions targeting the adjacent area of real-time tracking of air cargo shipments. In the recent years, the trailer and cargo container tracking market has attracted an increasing number of connectivity service providers (CSPs). Several CSPs including Orbcomm, KPN, Numerex and Inmarsat (shareholder in SkyWave) have assumed the role of end-to-end solution providers of container and other asset tracking applications.

Berg insight anticipates that there will be a strong focus on cargo transport security and increased supply chain visibility in the coming years. Tracking of trailers, swap bodies and intermodal containers are increasingly common and technology advancements allow for even smaller logistics units such as individual pallets or cargo boxes to be tracked at reasonable costs. Acceptance of remote tracking solutions is first established in specific use cases such as high value, time critical or refrigerated goods. Proving the commercial value for the various players in the transport value chain and bringing down hardware prices are key to increase the adoption rate for cargo tracking solutions.

### This report answers the following questions:

- Which are the leading providers of trailer and cargo 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 cargo tracking devices?
- What are the recent merger and acquisition activities on this market?
- What impact will technology advancements have on the market?
- How will the cargo telematics industry evolve in the future?

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## About the Author



**Johan Svanberg** is a Senior Analyst with a Masters degree from Chalmers University of Technology. He joined Berg Insight in 2007 and his areas of expertise include M2M/IoT markets and connected wearables.

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