Trailer and Cargo Container Tracking

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

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- **Insights** from 40 new executive interviews with market leading companies.
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- **In-depth** analysis of market trends and key developments.
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Strong growth for cargo container and trailer telematics in the next 5 years

Trailer and cargo container tracking is a subsegment 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, real-time 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 2014, there were over 20 million intermodal containers and over 13 million trailers worldwide.

Berg Insight estimates that shipments of remote tracking systems with cellular or satellite communication capabilities for cargo loading units including trailers, intermodal containers, air freight cargo containers, cargo boxes and pallets reached 0.43 million units worldwide in 2014. Growing at a compound annual growth rate of 28.5 percent, the shipments are expected to reach 1.5 million units in 2019. During the same period the installed base of remote tracking systems is forecasted to grow at a compound annual growth rate of 26.2 percent from 1.8 million units at the end of 2014 to 5.8 million units by 2019. Tracking of trailers and swap bodies is the largest market segment and accounted for 71.3 percent of the total installed base of tracking units on trailers and cargo containers at the end of 2014. Intermodal container tracking is the second largest segment with an installed base of 350,000 tracking units at the end of 2014.

In the past year, AT&T has connected 290,000 of Maersk Line’s fleet of refrigerated intermodal containers. An important technology partner in the project has been WAM Technologies which in October 2015 was acquired by ORBCOMM. In total, ORBCOMM has an installed base of 180,000 tracked trailers and containers. Savi Technology, Zenatek, Envitech, Honeywell Global Tracking, EPsA, Emerson and Track24 are also prominent vendors with solutions especially developed for tracking and monitoring of intermodal containers. The North American trailer tracking market is the most developed segment for tracking of trailers and cargo containers. The major actors include SkyBitz and Omnitracs that have more than 200,000 units installed each across the US, Canada and Mexico. Spireon and ID Systems are also important players with installed bases of 150,000 and 125,000 active units respectively. The cargo security specialist FreightWatch International has an active installed base of 60,000 units deployed on trailers and cargo containers. Mecomo, Idem Telematics, Agheera, Schmitz Cargobull, Novacom Europe and Transics have installed bases in the range of 14,000–48,000 units and are all major players on the European inland trailer and swap body telematics market. Sendum, Moog and OnAsset Intelligence are examples of actors which offer specialised solutions for real-time tracking of air freight cargo. There are also vendors offering disposable low cost tracking devices that are only meant to be used once such as Locus Traxx.

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 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 the cost of hardware 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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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 embedded connectivity and wireless M2M/IoT markets focusing on the Industrial Internet-of-Things and connected consumer electronics.

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