# Trailer and Cargo Container Tracking

## 11th Edition

*Trailer and Cargo Container Tracking is the eleventh consecutive report from Berg Insight analysing the latest developments on the trailer and cargo container tracking market worldwide. This strategic research report from Berg Insight provides you with 240 pages of unique business intelligence including 5-year industry forecasts and expert commentary on which to base your business decisions.*

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# The installed base of active cargo tracking units will reach 27 million by 2027

Cargo and cargo carrying unit tracking aims to increase operational efficiency and visibility in transport chains. Berg Insight's definition of a real-time tracking solution is a system that at minimum incorporates data logging, satellite positioning and data communications to a backoffice application through cellular or satellite networks. The tracking device can be designed to track the cargo carrying unit, i.e. the trailer, intermodal container, rail freight wagon, air freight ULD or pallet, or the cargo itself. Tracking devices for cargo carrying units are permanently or temporarily installed while general cargo tracking devices are typically placed with the cargo during transport. Having access to real-time data on the location and status of cargo carrying units and cargo enable the various stakeholders in the supply chain to make better-informed decisions, increase asset utilization, save costs and reduce the environmental impact.

Berg Insight estimates that shipments of tracking devices with cellular or satellite communications capabilities for cargo carrying units reached 2.9 million units worldwide in 2022. Growing at a compound annual growth rate (CAGR) of 13.7 percent, shipments are expected to reach 5.4 million units in 2027. During the same period, the installed base of tracking devices is forecasted to grow at a CAGR of 18.2 percent, from 8.8 million units at the end of 2022 to 20.3 million units by 2027. Trailer tracking is the largest market segment, estimated to account for 51.5 percent of the total installed base of tracking devices in 2022. Intermodal container tracking is the second largest segments in terms of the number of installed units. The installed base of tracking devices on rail freight wagons, air freight ULDs and pallets is substantially smaller. The number of active tracking devices and real-time data loggers in use for general cargo applications reached 2.0 million units at the end of 2022. The market segment is set for rapid growth in the coming next few years as prices are expected to decrease and smart labels and other devices with a very small footprint are being introduced. The number of active devices in use is forecasted to reach 6.6 million units at the end of 2027. Yearly device shipments in this category will grow from 7.4 million units in 2022 to reach 28.2 million units in 2027. Total revenues for tracking solutions for cargo carrying units and cargo reached € 1.8 billion in 2022. Growing at a CAGR of 13.1 percent, the total market value is forecasted to reach € 3.4 billion in 2027.

The market for trailer, container, rail freight wagon, ULD, pallet and general cargo tracking solutions is served by a wide range of players. Companies offering solutions for cargo carrying units typically focus on one application, e.g. trailer tracking. However, these companies often have devices installed on several different asset types. General cargo tracking solution providers are most often specialised in that market segment. Berg Insight ranks ORBCOMM as the largest provider of tracking solutions, having a significant installed base of both trailers and containers. The company's total installed base reached 940,000 units at the end of 2022. The second largest player SkyBitz had an installed base of about 725,000 tracking units, primarily on trailers, at the end of 2022. Additional leading providers of trailer telematics solutions are Spireon (now owned by Solera), Samsara, CalAmp, Motive, Idem Telematics, Powerfleet, Phillips Connect (the telematics division of Phillips Industries), Schmitz Cargobull, TGI, Transics (ZF), BlackBerry, TGI, EROAD, Krone and Cooltrax.

The container tracking market is led by Maersk, which has equipped its entire fleet of 380,000 reefer containers with tracking devices. Other major players in the segment are ORBCOMM, Envotech, ZillionSource, Globe Tracker, Traxens and MECOMO. Globe Tracker has grown rapidly in the past year and has now reached an installed base of over 150,000 container tracking units. The company has a major project with the liner shipping company Hapag-Lloyd to equip its entire reefer container fleet with tracking units. Major telematics players in the rail industry are Nexxiot, Amsted Rail, DOT Telematik, Siemens, SAVVY Telematic Systems, Cognid Telematik, Cargomon Systems and Intermodal Telematics. Nexxiot is the leading player in the segment, working on large-scale projects in Europe. Sensitech (part of Carrier), DeltaTrak, Tive, Roambee, Controlant, Frigga (Dewav Electronic Technology), Copeland and OnAsset Intelligence are the leading providers of cargo tracking devices. These players offer tracking devices that can be used on all modes of transport, including air freight.

About 30 million intermodal containers, 15 million trailers, 5 million rail freight wagons and one million air freight ULDs are in use worldwide today. The penetration rate of tracking devices installed on these cargo carrying units amounts to only about 16 percent, indicating that there is still much room for growth. Berg Insight anticipates that the ongoing trend in the transport industry to invest in new digital solutions that increase visibility and security in the supply chain will continue and even accelerate in the coming next few years. The recent disruptions in the global supply chain caused by the pandemic have accentuated the need for real-time shipment data. Bolstered by new IoT communications technologies, solution providers are now able to design cost-effective tracking solutions that meet the needs of fleet and asset owners, transport companies, shippers and other stakeholders in the transport industry.

Installed base of active trailer and cargo container tracking devices (World 2022–2027)