

Summary

Executive summary

An increasing number of companies have introduced asset tracking and management solutions which can be used to keep track of airport assets and improve the efficiency of ground handling operations and maintenance routines. Berg Insight estimates that the global installed base of active airport asset tracking systems was less than 0.2 million units in 2017. Growing at a compound annual growth rate (CAGR) of 12.5 percent, the active installed base is estimated to reach close to 0.3 million units worldwide in 2022. This includes all airport asset tracking systems deployed for various motorised ground support equipment (GSE), non-motorised equipment (NME) as well as other applicable airport assets including on-road vehicles used in airport environments. Berg Insight's definition of an airport asset tracking solution covers systems based on various technologies including conventional cellular-based M2M data communications and emerging IoT technologies such as low-power wide-area (LPWA) wireless technology (e.g. LoRa networks) as well as proprietary radio, Wi-Fi and Bluetooth.

The airport asset tracking market is served by a number of different types of players, ranging from specialists focused exclusively on tracking solutions for specific airport assets, to companies that offer a more comprehensive set of solutions for the aviation sector, and more general telematics players that also serve other industries. Berg Insight ranks Undagrid (GSEtrack), Resonate MP4 (XOPS) and Quantum Aviation Solutions as the leading providers of airport asset tracking solutions, all having estimated installed bases of 10,000 active units or more. Other notable players include EC2E, ADVEEZ and Pinnacle Telematics (iMATS) which all have installed bases of at least 4,000 units each. Targa Telematics is moreover a fast-growing vendor which is expected to increase its market share considerably following a strategic alliance with the new partner TCR Group in 2018. TCR is also collaborating with Sensolus for non-motorised GSE tracking. Additional players active in the field of airport asset tracking for example include Litum IoT, INFORM, Tri-Logical Technologies, Smart Asset Manager (SAM), Geotab, I.D. Systems, Speedshield Technologies and Ctrack (Inseego). The latter cooperates with Undagrid for the non-motorised component of its airport solution.