

Index

Table of Contents

Table of Contents.....	i
List of Figures.....	vii
Executive summary.....	1
1 Global freight transportation overview.....	3
1.1 International merchandise trade.....	4
1.1.1 Freight transportation modes.....	6
1.1.2 Logistics units and containerisation.....	7
1.1.3 Ports, terminals and trade lanes	9
1.2 Intermodal shipping containers.....	12
1.2.1 Container fleet.....	14
1.2.2 Container manufacturers.....	15
1.2.3 Container ownership structure.....	16
1.2.4 Container ships	17
1.2.5 Container shipping companies.....	18
1.2.6 Container leasing companies	19
1.3 Trailers, semi-trailers, rail freight wagons and ULDs.....	21
1.3.1 Trailers and semi-trailers	21
1.3.2 Rail Freight Wagons	23
1.3.3 Air freight unit load devices.....	26
1.4 Other transport industry actors	29
1.4.1 Consigner/Consignee	30
1.4.2 Freight forwarders	31
1.4.3 Customs and regulatory authorities.....	31
1.4.4 Terminal operators and ground handlers	32
2 Trailer and cargo container tracking solutions.....	35
2.1 Trailer and cargo container tracking infrastructure	36
2.1.1 Trailer and cargo container segment.....	38
2.1.2 GNSS segment	41

2.1.3	Network segment	42
2.1.4	Service segment.....	44
2.2	Supply chain management	45
2.2.1	Cargo and inventory management	45
2.2.2	Insurance risk management.....	46
2.3	Security management	47
2.3.1	Theft, accident and damage security.....	47
2.3.2	Terrorism and illegal and dangerous goods security	47
2.4	Trailer and container management	48
2.4.1	Container and trailer fleet management.....	48
2.4.2	Container and trailer transport management.....	48
2.5	Regulatory compliance and reporting.....	49
2.5.1	Supply chain security and environmental programs	49
2.5.2	Tax collection	54
2.6	International container and cargo tracking technology initiatives.....	54
2.6.1	The Integrity project	54
2.6.2	The Smart-CM project	55
2.6.3	The Cassandra project.....	56
2.6.4	The CONTAIN project	57
2.6.5	The CORE project	58
2.6.6	The RTICM project	58
2.6.7	The SaMoLoSa project.....	59
2.6.8	The US Department of Homeland Security's Cargo Security Programs	60
2.6.9	The RECONS project	61
2.6.10	The Apex-Secure Transit Corridors Project	61
2.6.11	The NexTrust project.....	62
2.6.12	The DataPorts project	62
2.6.13	Container 42.....	63
2.7	Business models	64
3	Market forecasts and trends	67
3.1	Market analysis.....	67
3.1.1	Installed base and unit shipments	68

- 3.1.2 Market value 72
- 3.1.3 Regional markets 74
- 3.1.4 Vendor market shares 75
- 3.2 Market drivers and barriers 82
 - 3.2.1 Macroeconomic environment 82
 - 3.2.2 Regulatory environment 84
 - 3.2.3 Competitive environment 86
 - 3.2.4 Technology environment 87
- 3.3 Value chain analysis 88
 - 3.3.1 Telematics industry players 88
 - 3.3.2 Cargo transport industry players 94
 - 3.3.3 Trailer and cargo container OEMs 100
 - 3.3.4 Telecom industry players 101
 - 3.3.5 IT industry players 105
- 3.4 Future industry trends 107
- 4 European solution providers 111
 - 4.1 Agheera 113
 - 4.2 Arviem 114
 - 4.3 Bosch 115
 - 4.4 BT9 116
 - 4.5 CargoGuard 117
 - 4.6 Controlant 117
 - 4.7 CLS Group 119
 - 4.8 DHL 120
 - 4.9 DOT Telematik 122
 - 4.10 EPSa 123
 - 4.11 Globe Tracker 124
 - 4.12 Hanhaa 126
 - 4.13 Hirschmann Mobility (TE Connectivity) 127
 - 4.14 Idem Telematics 129
 - 4.15 Identec Solutions 130
 - 4.16 Intermodal Telematics 131

4.17	Kirsen Global Security	133
4.18	Kizy Tracking	134
4.19	KPN	135
4.20	LOSTnFOUND (fleet.tech)	136
4.21	Maersk Line	137
4.22	MECOMO	139
4.23	Next4	141
4.24	Nexxiot	142
4.25	Ovinto	143
4.26	RM2	145
4.27	SAVVY Telematic Systems	146
4.28	Schmitz Cargobull	147
4.29	SecureSystem	149
4.30	Sensire	150
4.31	Siemens	150
4.32	Sycada	152
4.33	Transics (WABCO)	153
4.34	Traxens	155
4.35	Trusted	157
4.36	TSS	158
4.37	Ubidata	159
4.38	Zenatek	160
5	North American solution providers	163
5.1	7PSolutions	165
5.2	Amsted Rail	167
5.3	AT&T	168
5.4	Ayantra	170
5.5	BlackBerry	171
5.6	BSM Technologies (Geotab)	173
5.7	CalAmp	175
5.8	Ctrack (Inseego)	178
5.9	DeltaTrak	179

5.10 Digi International..... 181

5.11 Digital Communications Technologies..... 183

5.12 Emerson 183

5.13 Fleet Complete 186

5.14 Fleetilla..... 188

5.15 Geoforce 190

5.16 Globalstar 191

5.17 Hi-G-Tek..... 193

5.18 Honeywell 195

5.19 Intelyt 197

5.20 Nortac Defence..... 198

5.21 OmnitracS 199

5.22 OnAsset Intelligence..... 202

5.23 ORBCOMM 204

5.24 Pallet Alliance 209

5.25 PalleTech 209

5.26 Phillips Connect Technologies 210

5.27 PowerFleet..... 211

5.28 Purfresh 214

5.29 Quake Global..... 215

5.30 Roambee 216

5.31 RSAE Labs..... 218

5.32 Samsara..... 220

5.33 Savi Technology 221

5.34 Sendum Wireless..... 223

5.35 Sensitech 225

5.36 Sierra Wireless..... 226

5.37 SkyBitz (Ametek) 227

5.38 Spireon 230

5.39 SpotSee 233

5.40 Teletrac Navman..... 234

5.41 TGI 236

5.42	Thermo King (Ingersoll Rand)	236
5.43	Trimble	239
5.44	Wireless Links	240
5.45	Zest Labs (Ecoark)	241
6	Rest of World solution providers	243
6.1	Arknava	244
6.2	CartaSense	245
6.3	Contguard.....	246
6.4	Cooltrax	246
6.5	Eliron.....	247
6.6	Envotech.....	248
6.7	Globaltrack	250
6.8	Loginno Logistic Innovation	251
6.9	MiX Telematics.....	252
6.10	Pointer (PowerFleet)	254
6.11	Queclink Wireless Solutions	257
6.12	Satlock.....	258
6.13	Sony.....	259
6.14	Starcom Systems	260
6.15	Swinnus	263
6.16	TPL Trakker.....	265
6.17	Tracertrak (Pivotel)	265
6.18	ZillionSource Technologies	266
6.19	ZIM.....	267
	Glossary	269

Index

List of Figures

Figure 1.1: Index for GDP and international merchandise trade (World 1990–2018)	4
Figure 1.2: Merchandise trade by region (World 2018).....	5
Figure 1.3: External trade by mode of transport (EU-28 2017)	6
Figure 1.4: Container port throughput (World 2005–2018)	9
Figure 1.5: Top 10 container ports (World 2018)	10
Figure 1.6: Top 10 air cargo ports (World 2018)	11
Figure 1.7: Container flows	12
Figure 1.8: Examples of intermodal container form factors	13
Figure 1.9: Intermodal container fleet size (World 2010–2018).....	14
Figure 1.10: Intermodal container fleet by type (World 2018).....	15
Figure 1.11: Container manufacturer market shares (World 2018)	16
Figure 1.12: Container fleet ownership structure (World 2018).....	17
Figure 1.13: Top 10 container shipping companies (World April 2020).....	19
Figure 1.14: Top container leasing companies (World 2019)	20
Figure 1.15: Cargo trailer fleet by region (World 2019)	21
Figure 1.16: Examples of trailer form factors.....	22
Figure 1.17: Examples of rail wagon form factors	24
Figure 1.18: Transported tonne-kilometres by rail per region (World 2018)	25
Figure 1.19: Number of rail freight wagons per region (World 2020).....	26
Figure 1.20: Examples of ULD pallet and container form factors.....	27
Figure 1.21: Annual air cargo growth rates by major market (World 2019)	28
Figure 1.22: Top 10 air cargo airlines (World 2018)	29
Figure 1.23: The transport chain.....	30
Figure 1.24: Top 5 container terminal operators (World 2018)	32
Figure 2.1: Real-time trailer and cargo container tracking infrastructure overview	37
Figure 2.2: Examples of trailer and cargo container tracking device form factors.....	39
Figure 2.3: Data interfaces used by container tracking units	40
Figure 2.4: Top 10 mobile operators by reported IoT connections (World Q4-2019).....	43

Figure 2.5: Example of trailer and cargo container tracking service segment.....	44
Figure 2.6: Examples of supply chain programs and initiatives (World 2020)	51
Figure 2.7: Stakeholder benefits through Cassandra data sharing and risk assessment	56
Figure 2.8: Container 42	63
Figure 3.1: Tracking device shipments and installed base (World 2019–2024).....	69
Figure 3.2: Cold chain tracking device shipments and installed base (World 2019–2024)	70
Figure 3.3: Trailer and cargo container market value (World 2019–2024)	73
Figure 3.4: Trailer tracking device shipments by region (World 2019–2024).....	75
Figure 3.5: Major cargo loading unit tracking vendors (Q4-2019)	77
Figure 3.6: Major trailer tracking vendors (Q4-2019).....	78
Figure 3.7: Major intermodal container tracking vendors (Q4-2019)	80
Figure 3.8: Major rail freight wagon tracking vendors (Q4-2019).....	81
Figure 3.9: M&As in the trailer and cargo container tracking space (2015–2017)	91
Figure 3.10: M&As in the trailer and cargo container tracking space (2018–2020)	92
Figure 3.11: Examples of GSM/GPS tracking devices approved for air cargo	97
Figure 3.12: FedEx SenseAware.....	99
Figure 3.13: Examples of telecom players offering cargo container and trailer tracking.....	103
Figure 4.1: European solution providers (A–G)	111
Figure 4.2: European solution providers (H–Z)	112
Figure 4.3: Bosch Asset Tracking Gateway and Sensor Tags	115
Figure 4.4: CO 10.01 Real-time Logger	118
Figure 4.5: Parcelive tracker and online portal	126
Figure 4.6: The HS 3000 Series tracking device	128
Figure 4.7: IMT's connected tank container solution	132
Figure 4.8: Overview of Maersk Line's Remote Container Management (RCM).....	138
Figure 4.9: Mecomo's mecSOLAR solar-powered tracking device.....	140
Figure 4.10: Next4's removable tracking device	141
Figure 4.11: Ovinto Remote Monitoring System.....	144
Figure 4.12: RM2 BLOCKPal connected pallet.....	146
Figure 4.13: Overview of Siemens Controlguide CTmobile system.....	152
Figure 4.14: Trusted T7+ tracking device	158
Figure 5.1: North American solution providers (A–P)	164

Figure 5.2: North American solution providers (P–Z) 165

Figure 5.3: 7PSolutions’ GL300W tracking device 166

Figure 5.4: BlackBerry Radar H2 and A2..... 172

Figure 5.5: FlashLink Real-Time Mini Loggers 180

Figure 5.6: SmartSense by Digi 181

Figure 5.7: Fleetilla FL950 tracking device 189

Figure 5.8: Globalstar’s SmartOne Solar tracking device 192

Figure 5.9: Nortac Defence’s Shadow tracking device 199

Figure 5.10: SENTRY 500 tracking device..... 203

Figure 5.11: GT 1200 Series trailer and container tracking device 206

Figure 5.12: Overview of PalleTech’s solution..... 210

Figure 5.13: PowerFleet’s LV-710 camera sensor 213

Figure 5.14: Purfresh active atmosphere panels 215

Figure 5.15: Roambee BeeAware NB-IoT tracking solution 218

Figure 5.16: Savi Locate 222

Figure 5.17: Sendum’s PT300 package tracker 224

Figure 5.18: Spireon FL Flex modular trailer tracking device..... 232

Figure 5.19: SpotBot Cellular tracking device 234

Figure 5.20: Thermo King Precedent connected trailer refrigeration unit 238

Figure 6.1: Rest of World solution providers (A–T)..... 243

Figure 6.2: Rest of World solution providers (T–Z) 244

Figure 6.3: Envotech’s RadioSecure SLM 249

Figure 6.4: Pointer’s CelloTrack Nano and external BLE MultiSense device 256

Figure 6.5: Sony Visilion tracker and online application 260

Figure 6.6: Starcom Systems’ tracking devices 262

Figure 6.7: Swinnus’ container tracking and security devices 264

