

BRAZILIAN CONNECTED TRUCKS TELEMATICS GROWTH OPPORTUNITIES

After the Rise of Cargo Thefts and Diesel Cost, Risk and Fuel Management Solutions will Lead to Transformational Growth of Brazilian Telematics

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KEY QUESTIONS THIS INTELLIGENCE WILL ANSWER

- What is the future scenario for the connected trucks telematics industry in Brazil?
- What will be the potential industry size in 2027?
- What are the key solutions in the segment?
- What are some upcoming solutions in demand?
- Who are the major industry participants, and their level of foothold?
- What are the business models that can benefit stakeholders?
- What are some of the trends that will impact industry growth?
- What is the growth potential for the connected trucks telematics industry in Brazil?



KEY FINDINGS

The telematics installed base in Brazilian connected trucks was estimated at **1.12 million units** as of 2021. The installed base is expected to grow to **2.59 million units** by 2027, growing at a **CAGR of 15%**.

Leading telematics service providers include the traditional TSP Sascar, Positron, Omnilink, Autotrac, and OnixSat. Some OEMs are producing trucks with fleet telematics systems factory installed. These are Mercedes-Benz, Volvo, Volkswagen, Scania, and Iveco. Several partnerships between TSPs with OEMs, with start-ups and with other TSPs were identified in the Brazilian market.

OVERVIEW OF KEY TELEMATICS SERVICES

TSPs and OEMs offer a wide range of services, from basic to advanced solutions, segmented into 6 categories. Start-ups, on the other hand, generally have a smaller product portfolio.



KEY INDUSTRIAL DEVELOPMENTS

- Many connected trucks are equipped with telematics solutions required by their shippers. These solutions vary from simple trackers to more advanced solutions. Trucks that carry dangerous or expensive goods must have security solutions on their vehicles.
- In Brazil, it is common to find a truck with several telematics devices installed, each from a different provider. It is due to three main reasons: fleet operator seeks the best price for each solution, the shipper has agreements with different telematics companies, and solutions can not be integrated into a single open platform.



GROWTH OPPORTUNITIES



Fuel Consumption and Fuel Management



Last-Mile Delivery



Open Telematics Systems

KEY COMPETITORS

SASCAR
POSITRON
AUTOTRAC
OMNILINK
ONIXSAT

ANALYST INSIGHTS

As a result, more TSPs are providing safety & security and driver management solutions to fleet managers. In addition to rising tech solutions, another driver for this market is the several partnerships being established among OEMs, TSPs, and start-ups



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