

# **Railway Telematics Market by Solution (Fleet Management, Automatic Stock Control, Shock Detection, Reefer Wagon Management, ETA), Railcar (Hoppers, Tank Cars, Well Cars, Boxcars, Reefer Cars), Component & Region - Global Forecast to 2026**

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## **Abstracts**

The railway telematics market is estimated to be USD 5.1 billion in 2021 and is projected to grow at a CAGR of 7.5% during the forecast period, to reach USD 7.3 billion by 2026. Railway telematics is defined as the use of telecommunications and informatics across freight railways. The railway telematics market comprises solutions and services which enable communication and data transfer over long distances through wireless mediums. These solutions and services leverage the embedded technology and mobile and telematics systems and offer control over railcars on the move. The various solutions offered by telematics companies include automatic stock control, estimated time of arrival, fleet management, railcar tracking & tracing, refrigerated wagon management, remote data access, shock detection, and others which are used across various railcars such as hoppers, tank cars, boxcars, well cars, refrigerated boxcars, and others.

North America accounted for the largest share of the market in 2021. The presence of OEMs such as Siemens (Germany), Bosch (Germany), Knorr-Bremse (Germany), Amsted Digital (US) and their investments in rail telematics is one of the major factors fueling the growth of this market in North America and Europe regions. For instance, in 2020, major US rail companies such as GATX corporation, Norfolk Southern, Genesee & Wyoming, Watco, and Trinity Rail announced a joint venture Rail Pulse, which is expected to accelerate the adoption of GPS and other telematics technologies in the near future across the North American railcar fleet. This is expected to enable competitiveness in the rail sector between freight transportation companies due to

improvements in the location monitoring and condition monitoring of railcars. As technology evolves, the safety of railcars and other solutions are expected to be adopted by railcar fleet owners. Due to the new telematics technologies, railcar owners are expected to be able to capture data such as whether a railcar is partially or fully loaded, its onboard bearing temperature, whether doors or hatches are closed or open, wheel impact detection data, and other possible solutions to enable running railcar fleets efficiently, manage data generated through the use of technology and improvise on idle rail cars, maintenance, reduce turnaround time of railcars, control stock, and others. The rising adoption of telematics solutions by rail car leasing operators is expected to drive the rail telematics market in future.

The future of the freight rail industry is expected to rely on smart digital transportation systems that leverage technologies over larger railcar networks. New technologies such as integrated service management, asset management, and predictive analytics, shock detection, and automatic stock control are expected to help rail management companies manage optimal routes, schedules, capacities, and idle railcars in near real-time. Due to the increasing presence of smart technologies in rail transportation, the associated solutions and services markets are also expected to grow at high rates, globally. Emerging technologies such as refrigerated wagon management, estimated time of arrival of railcars are expected to enable efficient and better freight rail transportation. This is also expected to improve timely decision-making for issues such as asset deployment, utilization, and railcar maintenance.

The railway telematics market is dominated by players such as Hitachi Ltd. (Japan), Siemens (Germany), Bosch (Germany), Knorr-Bremse (Germany), and Alstom (France). These companies offer an extensive range of products & solutions and have strong distribution networks worldwide. The key strategies adopted by these companies to sustain their market positions are new product developments, collaborations, and contracts & agreements. The railway telematics market in different regions is dominated by the regional OEMs.

“Wide adoption of fleet management solutions expected to lead to market growth”

Fleet management software supports demand-driven planning and provisioning of railcars for businesses. Features such as short maintenance times and optimized dispatch provide the higher availability of wagons computes as the features of fleet management solutions. This can be achieved by the utilization of train tracking systems. Train tracking systems basically work as real-time rail location and detection systems. They track the location of the rail and provide details about the location, rail speed, and

next station details to the train operator, and all those who want the information. The monitoring solutions are systems which are capable of monitoring rail system health, rail tension, temperature, and engine health.

The companies that supply these systems support operators in all the aspects related to fleet management. The services provided include a package of programs for rail vehicle tracking, statistical report elaboration based on analyses concerning the activities performed by every vehicle (rail car, train). These programs also keep track of all the mechanical and technical malfunctions and provide information about leasing and sub-leasing, commercial information, and necessary repairs, including information about the repairs undertaken until that specific time. This information is safe, fast, flexible, and constantly updated in order to improve the services provided to customers. This helps create competition between suppliers and increases competition between leasing companies and railway operators who need support in order to provide safe and efficient transport services.

The freight management system manages a wide range of rail freight transportation processes and delivers real-time information on freight traffic. The system assists rail operators in monitoring freight transportation movements and planning future logistics. Solutions such as freight operation management solutions for enhancing the capacities and operations management of freight and freight tracking solutions for tracking real-time location of cargo containers are included in fleet management solutions. They help freight operators in planning decisions based on robust, reliable, and consistent data. They also improve labor utilization and productivity. The solution is widely adopted by logistics companies for better customer support and loyalty.

A railway operator and a leasing company represents the key to fleet management optimization, enabling a company benefit from the advantages offered by rail transport. To ensure business efficiency and profitability for the services provided by railway operators, it is necessary to elaborate and implement projects for improvements in fleet management. Fleet management systems maintain inventories of vehicles and provide forecasts on the costs of operations and enable the intelligent use of financing methods. The liberalization of rail freight transport generates increasing pressure on the financial results of railway companies. In this context, fleet management becomes a vital instrument for the measurement of the performance of rolling stock.

Rail companies are increasing asset utilization and making significant investments in IT infrastructure to meet the capacity challenges. The market for telematics fleet management solutions offered for the railways is expected to grow during the forecast

period as the solutions enable customers optimize in order to have more wagons at their disposal.

“Significant fleet of hoppers in freight rail to ensure dominant position of the segment”

Hoppers are a form of railroad freight car used for the transportation of loose bulk commodities. Open and closed hoppers are available in market depending upon their required usage and the type of service provided. Open hoppers are majorly used for the transportation of commodities which are unaffected by the atmosphere whereas closed hoppers are used for the transportation of goods that can be spoilt due to exposure to environmental factors. Telematics solutions are installed in these hoppers for tracking and tracing goods.

Solutions such as motion detectors, GPS sensors, and shock detectors are also installed for such hoppers in order to facilitate the transportation of goods at their optimal quality. OEMs such as Trinity Rails and Wascosa, among others have offerings in this segment. The types of hoppers installed with telematics solutions offered by various OEMs include aluminum hoppers, open hoppers, hybrid open hoppers, pressure differential covered hoppers, pneumatic discharge covered hoppers, and others. Due to the adoption of telematics technologies in freight logistics, the market for hoppers telematics is expected to grow.

“TCUs enable fleet managers provide real-time data to railcar lease operators”

The telematics control unit (TCU) is an embedded system used for controlling diagnostics and communication to/from railcars, wireless tracking, and diagnostics tracking. The TCU optimizes antenna power providing significant diagnostics, sensing current, and low disturbance. This results in efficient, faster, and reliable data transmission. Manufacturers are majorly focusing on designing TCUs with features such as size/weight optimization, extremely compact design, thermal simulation/optimization, and efficiency in challenging environmental conditions.

TCUs help fleet managers provide real-time location to customers about the location of their goods and wagons with an accuracy of within two meters. Digitalization enables providing new generation information access to technicians, transport planners, and current and future customers. This information can be provided regardless of the country and on which railroad the goods are shipped. TCU enables further monitoring through accelerometers to gain valuable insights on how railcars are being handled. These factors are driving the growth of the market for the TCU component. Due to the

increase in the demand for freight transportation, spending on digitization is on rise for rail telematics solutions. Thus, railcar lease operators are provided with rail logistics data, helping optimize the utilization of railcars and increasing the efficiency of rail logistics. Thus, the rising demand for TCUs is expected to lead to the growth of segment.

The study contains insights from various industry experts, ranging from component suppliers to tier 1 companies and OEMs. The break-up of the primaries is as follows:

By Company Type: Tier 1 - 52%, Tier 2 – 34%, Others - 26%

By Designation: C level - 47%, D level - 37%, Others - 16%

By Region: Asia Pacific- 32%, North America - 28%, Europe - 24%, RoW-16%

Major players profiled in the report are Hitachi Ltd. (Japan), Siemens (Germany), Bosch (Germany), Knorr-Bremse (Germany), and Alstom (France).

### Research Coverage

The report segments the railway wiring harness market and forecasts its size, by value, on the basis of solution (fleet management, automatic stock control, shock detection, reefer wagon management, eta & others), railcar (hoppers, tank cars, well cars, boxcars, reefer cars & others), component & region. It also covers the competitive landscape and company profiles of the major players in the railway wiring harness market ecosystem.

### Key Benefits of Buying the Report:

The report will help market leaders/new entrants in this market with information on the closest approximations of revenue and value for the railway wiring harness market and its sub segments.

This report will help stakeholders understand the competitive landscape and gain more insights to better position their businesses and plan suitable go-to-market strategies.

The report will also help the market players understand the impact of COVID-19

on railway wiring harness market.

The report also helps stakeholders understand the pulse of the market and provides them information on key market drivers, restraints, challenges, and opportunities.

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