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Electronic Logging Device Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Component (Display Unit, Telematics Unit), By Service Type (Entry-Level Services, Intermediate Services, High-End Services), By Form Factor (Embedded ELDs, Bring Your Own Device ELDs), By Vehicle Type (Trucks, Buses, Light Commercial Vehicles), By Region & Competition, 2019-2029F

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Abstracts

The Global Electronic Logging Device Market was valued at USD 12.37 Billion in 2023 and is predicted t%li%experience robust growth in the forecast period with a CAGR of 6.06% through 2029.

The global Electronic Logging Device (ELD) market is experiencing robust growth driven by regulatory mandates, technological advancements, and the increasing adoption of fleet management solutions. ELDs are electronic solutions used t%li%record and monitor the driving hours and activities of commercial motor vehicles (CMVs) t%li%ensure compliance with hours of service (HOS) regulations. These regulations, aimed at improving road safety and preventing driver fatigue-related accidents, mandate the use of ELDs in commercial fleets across various regions.

Technological advancements in ELDs have led t%li%the development of sophisticated devices capable of real-time data tracking, analysis, and reporting. Modern ELD systems integrate GPS technology, wireless communication, and cloud-based platforms t%li%provide fleet managers with comprehensive insights int%li%vehicle operations,

driver behavior, and compliance status. This integration enhances operational efficiency, reduces paperwork, and facilitates regulatory compliance for fleet operators.

The market for ELDs is witnessing significant expansion across various industries, including transportation and logistics, construction, and public utilities. As businesses seek t%li%improve operational transparency, driver safety, and compliance with regulatory standards, the demand for ELD solutions continues t%li%grow. Additionally, the integration of ELDs with telematics systems and fleet management software platforms enhances their functionality and expands their application scope beyond HOS compliance t%li%include fleet analytics, driver performance management, and customer service optimization.

The adoption of ELDs is not only driven by regulatory requirements but als%li%by the benefits they offer t%li%fleet operators. ELDs help optimize fleet management by improving route planning, scheduling, and asset utilization. They provide accurate data on vehicle location, engine hours, and driver activities, enabling better decision-making and cost management. Moreover, ELDs contribute t%li%fuel efficiency and maintenance cost reduction through real-time monitoring of vehicle performance and driver behavior.

Key players in the global ELD market are focusing on product innovation, partnerships, and strategic acquisitions t%li%strengthen their market presence and cater t%li%diverse customer needs. Government initiatives promoting digitalization and efficiency in transportation and logistics sectors further drive market growth. As regulatory frameworks evolve and technology advancements continue, the global ELD market is poised for continued expansion, offering opportunities for stakeholders t%li%leverage technology-driven solutions for enhanced fleet management and regulatory compliance.

Key Market Drivers

Regulatory Mandates Driving Adoption:

The primary driver for the global Electronic Logging Device (ELD) market is regulatory mandates aimed at improving road safety and enforcing hours of service (HOS) regulations for commercial motor vehicles (CMVs). Countries such as the United States, Canada, and European Union have implemented laws requiring commercial fleets t%li%use ELDs t%li%accurately record drivers' duty status and driving hours. These mandates ensure compliance with maximum driving and mandatory rest periods,

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reducing the risk of driver fatigue-related accidents and improving overall road safety. As governments worldwide continue t%li%prioritize transportation safety, the demand for ELDs remains robust, driving market growth.

Advancements in Telematics and Connectivity:

Technological advancements in telematics, GPS tracking, and wireless connectivity have significantly enhanced the capabilities of ELD systems. Modern ELDs integrate with telematics platforms and utilize cellular or satellite communication t%li%provide real-time data on vehicle location, engine status, and driver behavior. These advancements enable fleet managers t%li%monitor operations remotely, optimize route planning, and respond promptly t%li%compliance issues or emergencies. The integration of ELDs with fleet management software further enhances efficiency by automating tasks such as reporting, maintenance scheduling, and asset utilization analysis.

Focus on Fleet Optimization and Efficiency:

ELDs play a crucial role in optimizing fleet management by improving operational efficiency and reducing operational costs. By tracking and analyzing vehicle usage, idle times, and driver performance, ELDs provide valuable insights that enable fleet operators t%li%streamline operations, minimize fuel consumption, and enhance overall productivity. Real-time monitoring of driver behavior helps in promoting safer driving habits and reducing incidents of unauthorized vehicle use, contributing t%li%cost savings and improved fleet performance metrics.

Demand for Compliance and Data Accuracy:

There is a growing demand for ELDs that ensure accurate recording and reporting of HOS compliance data. ELDs eliminate manual paper logs, reducing errors and discrepancies associated with traditional methods of recording driver activities. Regulatory agencies and fleet operators rely on ELDs t%li%maintain accurate records of driving hours, rest breaks, and vehicle inspections, facilitating easier audits and compliance with legal requirements. The assurance of data accuracy and compliance with regulatory standards drives the adoption of ELDs across industries reliant on commercial transportation, including logistics, construction, and public utilities.

Key Market Challenges

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Regulatory Compliance and Implementation:

One of the primary challenges facing the global Electronic Logging Device (ELD) market is navigating complex and evolving regulatory landscapes across different regions. Regulatory requirements vary significantly between countries and even within different states or provinces, posing compliance challenges for fleet operators and ELD manufacturers alike. Ensuring that ELD systems meet specific regulatory standards and requirements can be resource-intensive and may involve significant costs for fleet operators.

Integration with Existing Systems:

Integrating ELDs with existing fleet management systems and technologies can be a complex process. Many fleet operators already use various systems for GPS tracking, dispatch management, maintenance tracking, and more. Ensuring seamless integration between ELDs and these existing systems is crucial for maximizing operational efficiency and obtaining accurate data insights. Compatibility issues, data synchronization challenges, and interoperability concerns can arise during integration, requiring technical expertise and potentially causing disruptions in fleet operations.

Cost of Implementation and Maintenance:

Deploying ELD systems involves upfront expenses such as purchasing hardware (devices and peripherals), software licenses, and installation. These costs can vary based on the size of the fleet, the complexity of integration with existing fleet management systems, and compliance with regional regulatory requirements. Training drivers and administrative staff on ELD usage and compliance procedures adds t%li%implementation costs. Ensuring all stakeholders understand the new technology and its operational implications is crucial for successful adoption and regulatory compliance. ELD systems require regular maintenance t%li%ensure accurate data recording, compliance with updated regulations, and seamless integration with evolving technology. Maintenance costs may include software updates, hardware repairs or replacements, and technical support services provided by ELD vendors or third-party providers. Regulatory changes and updates in different regions can necessitate modifications t%li%ELD systems t%li%ensure continued compliance. This may involve additional costs for software updates, recalibrations, or enhancements t%li%meet new standards or functionalities required by regulatory authorities. Evaluating the TCO of ELD systems involves considering not only upfront implementation and training costs but als%li%ongoing operational expenses related t%li%maintenance, support, and

compliance. Fleet operators often assess TCO t%li%determine the long-term financial viability and benefits of adopting ELD technology. Despite initial costs, ELD implementation can lead t%li%economic benefits such as improved operational efficiency, reduced administrative burdens (e.g., paperwork), enhanced driver productivity, and potential savings in fuel costs and insurance premiums. These economic benefits often outweigh the initial investment over the lifespan of the ELD system.

Data Security and Privacy Concerns:

ELDs generate and store sensitive data, including driver hours, vehicle locations, and operational activities. Ensuring the security and privacy of this data is paramount t%li%protect against unauthorized access, data breaches, and potential misuse. Compliance with data protection regulations, such as GDPR in Europe or CCPA in California, adds complexity t%li%data management practices for ELD manufacturers and fleet operators. Implementing robust cybersecurity measures, encryption protocols, and data access controls is essential t%li%mitigate risks and build trust among stakeholders.

Key Market Trends

Rising Demand for Cloud-Based Solutions:

There is a growing trend towards cloud-based ELD solutions that offer scalability, flexibility, and accessibility. Cloud platforms enable centralized data storage, analysis, and remote access t%li%compliance records, facilitating easier management and regulatory reporting for fleet operators.

Focus on Driver Safety and Compliance:

With stringent regulatory requirements governing hours of service (HOS), there is a heightened focus on ELDs that not only track driving hours accurately but als%li%promote driver safety. Advanced ELDs incorporate features like driver coaching, fatigue monitoring, and automated alerts t%li%ensure adherence t%li%safety standards and mitigate risks.

Shift towards Integrated Mobile Applications:

Many ELD providers are developing integrated mobile applications that offer drivers and

fleet managers enhanced functionalities such as route optimization, electronic document management, and real-time communication. These applications streamline operations and improve overall fleet productivity.

Emergence of AI and Machine Learning:

AI and machine learning technologies are being integrated int%li%ELD systems t%li%analyze data patterns, predict maintenance needs, optimize fuel efficiency, and improve route planning. These advancements help fleet operators make data-driven decisions and further enhance operational efficiency and cost-effectiveness.

Segmental Insights

Component Insights

Display Unit segment dominated in the global Electronic Logging Device market in 2023. Many regions, especially in North America and Europe, have mandated the use of ELDs t%li%monitor and record driving hours t%li%ensure compliance with hours of service (HOS) regulations. Display Units are integral t%li%ELD systems as they provide drivers with real-time information about their HOS status, driving limits, and compliance alerts. This regulatory mandate drives significant demand for Display Units in the market. Display Units offer a user-friendly interface that allows drivers t%li%easily monitor their driving hours, rest breaks, and compliance status. Modern Display Units are equipped with touchscreens, intuitive menus, and customizable settings, enhancing usability and reducing driver fatigue associated with manual logbooks or older ELD systems.

Display Units are often integrated with advanced telematics systems that provide additional functionalities such as GPS tracking, route optimization, and vehicle diagnostics. This integration enhances fleet management capabilities and operational efficiency, making Display Units a preferred choice for fleet operators looking t%li%streamline operations and improve productivity. Display Units capture and store comprehensive data on vehicle movements, driver activities, and compliance status. This data can be easily accessed and transmitted for regulatory reporting and audit purposes, ensuring transparency and accuracy in HOS records.

Display Units are designed t%li%be compatible with a wide range of commercial vehicles, including trucks, buses, and other fleet vehicles. They can integrate seamlessly with existing vehicle systems and third-party software platforms, providing

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flexibility for fleet managers and ensuring interoperability across different fleet operations.

Regional Insights

North America dominated the global electronic logging device market in 2023. North America, particularly the United States, implemented stringent regulatory mandates requiring the use of ELDs t%li%monitor and record driving hours for commercial motor vehicles (CMVs). The Federal Motor Carrier Safety Administration (FMCSA) mandate, known as the ELD mandate, compelling most CMV drivers t%li%adopt ELDs. This regulatory push has significantly driven the adoption of ELDs across the region, making North America a leading market globally. North America boasts one of the largest fleets of commercial vehicles globally, including long-haul trucks, delivery vehicles, and buses. The sheer size and scale of the commercial transportation industry in the region create substantial demand for ELDs t%li%ensure compliance with hours of service (HOS) regulations, improve safety standards, and enhance operational efficiency.

The ELD market in North America benefits from continuous technological advancements in ELD systems, including integrated telematics solutions, advanced data analytics, and cloud-based platforms. These technological innovations cater t%li%the diverse needs of fleet operators, offering capabilities beyond basic HOS compliance, such as fleet management, route optimization, and driver performance monitoring. North America's robust infrastructure supports the adoption and integration of ELD systems across various sectors of the transportation and logistics industry. Established industry players, including ELD providers, fleet management companies, and software developers, contribute t%li%a mature ecosystem that fosters innovation and drives market growth. The implementation of ELDs in North America has led t%li%measurable improvements in road safety, reduced instances of driver fatigue-related accidents, and enhanced operational efficiency for fleet operators. These benefits have reinforced the region's commitment t%li%maintaining and expanding the use of ELDs, further solidifying its leadership position in the global market.

Key Market Players

Trimble Inc.

Geotab Inc.

Teletrac Navman US Ltd

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Motive Technologies, Inc.

Verizon Communications Inc.

Samsara Inc.

Garmin Ltd.

Omnitracs, LLC

EROAD Inc.

Pegasus Transtech, LLC

Report Scope:

In this report, the Global Electronic Logging Device Market has been segmented int%li%the following categories, in addition t%li%the industry trends which have als%li%been detailed below:

Electronic Logging Device Market, By Component:

Display Unit

Telematics Unit

Electronic Logging Device Market, By Service Type:

Entry-Level Services

Intermediate Services

High-End Services

Electronic Logging Device Market, By Form Factor:

Embedded ELDs

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Bring Your Own Device ELDs

Electronic Logging Device Market, By Vehicle Type:

Trucks

Buses

Light Commercial Vehicles

Electronic Logging Device Market, By Region:

North America

United States

Canada

Mexico

Europe

Germany

France

United Kingdom

Italy

Spain

South America

Brazil

Argentina

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Colombia

Asia-Pacific

China

India

Japan

South Korea

Australia

Middle East & Africa

Saudi Arabia

UAE

South Africa

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Electronic Logging Device Market.

Available Customizations:

Global Electronic Logging Device Market report with the given market data, TechSci Research offers customizations according t%li%a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up t%li%five).

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Contents

1. PRODUCT OVERVIEW

1.1. Market Definition
1.2. Scope of the Market
  1.2.1. Markets Covered
  1.2.2. Years Considered for Study
  1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

2.1. Baseline Methodology
2.2. Key Industry Partners
2.3. Major Association and Secondary Sources
2.4. Forecasting Methodology
2.5. Data Triangulation & Validation
2.6. Assumptions and Limitations

3. EXECUTIVE SUMMARY

4. VOICE OF CUSTOMER

5. GLOBAL ELECTRONIC LOGGING DEVICE MARKET OUTLOOK

5.1. Market Size & Forecast
  5.1.1. By Value
5.2. Market Share & Forecast
  5.2.1. By Component (Display Unit, Telematics Unit)
  5.2.2. By Service Type (Entry-Level Services, Intermediate Services, High-End Services)
  5.2.3. By Form Factor (Embedded ELDs, Bring Your Own Device ELDs)
  5.2.4. By Vehicle Type (Trucks, Buses, Light Commercial Vehicles)
  5.2.5. By Region (North America, Europe, South America, Middle East & Africa, Asia Pacific)
5.3. By Company (2023)
5.4. Market Map

6. NORTH AMERICA ELECTRONIC LOGGING DEVICE MARKET OUTLOOK

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6.1. Market Size & Forecast
6.1.1. By Value
6.2. Market Share & Forecast
6.2.1. By Component
6.2.2. By Service Type
6.2.3. By Form Factor
6.2.4. By Vehicle Type
6.2.5. By Country
6.3. North America: Country Analysis
6.3.1. United States Electronic Logging Device Market Outlook
6.3.1.1. Market Size & Forecast
6.3.1.1.1. By Value
6.3.1.2. Market Share & Forecast
6.3.1.2.1. By Component
6.3.1.2.2. By Service Type
6.3.1.2.3. By Form Factor
6.3.1.2.4. By Vehicle Type
6.3.2. Canada Electronic Logging Device Market Outlook
6.3.2.1. Market Size & Forecast
6.3.2.1.1. By Value
6.3.2.2. Market Share & Forecast
6.3.2.2.1. By Component
6.3.2.2.2. By Service Type
6.3.2.2.3. By Form Factor
6.3.2.2.4. By Vehicle Type
6.3.3. Mexico Electronic Logging Device Market Outlook
6.3.3.1. Market Size & Forecast
6.3.3.1.1. By Value
6.3.3.2. Market Share & Forecast
6.3.3.2.1. By Component
6.3.3.2.2. By Service Type
6.3.3.2.3. By Form Factor
6.3.3.2.4. By Vehicle Type

7. EUROPE ELECTRONIC LOGGING DEVICE MARKET OUTLOOK

7.1. Market Size & Forecast
7.1.1. By Value

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7.2. Market Share & Forecast
7.2.1. By Component
7.2.2. By Service Type
7.2.3. By Form Factor
7.2.4. By Vehicle Type
7.2.5. By Country
7.3. Europe: Country Analysis
7.3.1. Germany Electronic Logging Device Market Outlook
7.3.1.1. Market Size & Forecast
7.3.1.1.1. By Value
7.3.1.2. Market Share & Forecast
7.3.1.2.1. By Component
7.3.1.2.2. By Service Type
7.3.1.2.3. By Form Factor
7.3.1.2.4. By Vehicle Type
7.3.2. France Electronic Logging Device Market Outlook
7.3.2.1. Market Size & Forecast
7.3.2.1.1. By Value
7.3.2.2. Market Share & Forecast
7.3.2.2.1. By Component
7.3.2.2.2. By Service Type
7.3.2.2.3. By Form Factor
7.3.2.2.4. By Vehicle Type
7.3.3. Spain Electronic Logging Device Market Outlook
7.3.3.1. Market Size & Forecast
7.3.3.1.1. By Value
7.3.3.2. Market Share & Forecast
7.3.3.2.1. By Component
7.3.3.2.2. By Service Type
7.3.3.2.3. By Form Factor
7.3.3.2.4. By Vehicle Type
7.3.4. United Kingdom Electronic Logging Device Market Outlook
7.3.4.1. Market Size & Forecast
7.3.4.1.1. By Value
7.3.4.2. Market Share & Forecast
7.3.4.2.1. By Component
7.3.4.2.2. By Service Type
7.3.4.2.3. By Form Factor
7.3.4.2.4. By Vehicle Type

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7.3.5. Italy Electronic Logging Device Market Outlook
7.3.5.1. Market Size & Forecast
7.3.5.1.1. By Value
7.3.5.2. Market Share & Forecast
7.3.5.2.1. By Component
7.3.5.2.2. By Service Type
7.3.5.2.3. By Form Factor
7.3.5.2.4. By Vehicle Type

8. SOUTH AMERICA ELECTRONIC LOGGING DEVICE MARKET OUTLOOK

8.1. Market Size & Forecast
8.1.1. By Value
8.2. Market Share & Forecast
8.2.1. By Component
8.2.2. By Service Type
8.2.3. By Form Factor
8.2.4. By Vehicle Type
8.2.5. By Country
8.3. South America: Country Analysis
8.3.1. Brazil Electronic Logging Device Market Outlook
8.3.1.1. Market Size & Forecast
8.3.1.1.1. By Value
8.3.1.2. Market Share & Forecast
8.3.1.2.1. By Component
8.3.1.2.2. By Service Type
8.3.1.2.3. By Form Factor
8.3.1.2.4. By Vehicle Type
8.3.2. Colombia Electronic Logging Device Market Outlook
8.3.2.1. Market Size & Forecast
8.3.2.1.1. By Value
8.3.2.2. Market Share & Forecast
8.3.2.2.1. By Component
8.3.2.2.2. By Service Type
8.3.2.2.3. By Form Factor
8.3.2.2.4. By Vehicle Type
8.3.3. Argentina Electronic Logging Device Market Outlook
8.3.3.1. Market Size & Forecast
8.3.3.1.1. By Value

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8.3.3.2. Market Share & Forecast
8.3.3.2.1. By Component
8.3.3.2.2. By Service Type
8.3.3.2.3. By Form Factor
8.3.3.2.4. By Vehicle Type

9. MIDDLE EAST & AFRICA ELECTRONIC LOGGING DEVICE MARKET OUTLOOK

9.1. Market Size & Forecast
9.1.1. By Value
9.2. Market Share & Forecast
9.2.1. By Component
9.2.2. By Service Type
9.2.3. By Form Factor
9.2.4. By Vehicle Type
9.2.5. By Country
9.3. Middle East & Africa: Country Analysis
9.3.1. Saudi Arabia Electronic Logging Device Market Outlook
9.3.1.1. Market Size & Forecast
9.3.1.1.1. By Value
9.3.1.2. Market Share & Forecast
9.3.1.2.1. By Component
9.3.1.2.2. By Service Type
9.3.1.2.3. By Form Factor
9.3.1.2.4. By Vehicle Type
9.3.2. UAE Electronic Logging Device Market Outlook
9.3.2.1. Market Size & Forecast
9.3.2.1.1. By Value
9.3.2.2. Market Share & Forecast
9.3.2.2.1. By Component
9.3.2.2.2. By Service Type
9.3.2.2.3. By Form Factor
9.3.2.2.4. By Vehicle Type
9.3.3. South Africa Electronic Logging Device Market Outlook
9.3.3.1. Market Size & Forecast
9.3.3.1.1. By Value
9.3.3.2. Market Share & Forecast
9.3.3.2.1. By Component
9.3.3.2.2. By Service Type

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9.3.3.2.3. By Form Factor
9.3.3.2.4. By Vehicle Type

10. ASIA PACIFIC ELECTRONIC LOGGING DEVICE MARKET OUTLOOK

10.1. Market Size & Forecast
10.1.1. By Value
10.2. Market Share & Forecast
10.2.1. By Component
10.2.2. By Service Type
10.2.3. By Form Factor
10.2.4. By Vehicle Type
10.2.5. By Country
10.3. Asia Pacific: Country Analysis
10.3.1. China Electronic Logging Device Market Outlook
10.3.1.1. Market Size & Forecast
10.3.1.1.1. By Value
10.3.1.2. Market Share & Forecast
10.3.1.2.1. By Component
10.3.1.2.2. By Service Type
10.3.1.2.3. By Form Factor
10.3.1.2.4. By Vehicle Type
10.3.2. India Electronic Logging Device Market Outlook
10.3.2.1. Market Size & Forecast
10.3.2.1.1. By Value
10.3.2.2. Market Share & Forecast
10.3.2.2.1. By Component
10.3.2.2.2. By Service Type
10.3.2.2.3. By Form Factor
10.3.2.2.4. By Vehicle Type
10.3.3. Japan Electronic Logging Device Market Outlook
10.3.3.1. Market Size & Forecast
10.3.3.1.1. By Value
10.3.3.2. Market Share & Forecast
10.3.3.2.1. By Component
10.3.3.2.2. By Service Type
10.3.3.2.3. By Form Factor
10.3.3.2.4. By Vehicle Type
10.3.4. South Korea Electronic Logging Device Market Outlook

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info@marketpublishers.com

10.3.4.1. Market Size & Forecast
10.3.4.1.1. By Value
10.3.4.2. Market Share & Forecast
10.3.4.2.1. By Component
10.3.4.2.2. By Service Type
10.3.4.2.3. By Form Factor
10.3.4.2.4. By Vehicle Type
10.3.5. Australia Electronic Logging Device Market Outlook
10.3.5.1. Market Size & Forecast
10.3.5.1.1. By Value
10.3.5.2. Market Share & Forecast
10.3.5.2.1. By Component
10.3.5.2.2. By Service Type
10.3.5.2.3. By Form Factor
10.3.5.2.4. By Vehicle Type

11. MARKET DYNAMICS

11.1. Drivers
11.2. Challenges

12. MARKET TRENDS AND DEVELOPMENTS

13. COMPANY PROFILES

13.1. Trimble Inc.
13.1.1. Business Overview
13.1.2. Key Revenue and Financials
13.1.3. Recent Developments
13.1.4. Key Personnel
13.1.5. Key Product/Services Offered
13.2. Geotab Inc.
13.2.1. Business Overview
13.2.2. Key Revenue and Financials
13.2.3. Recent Developments
13.2.4. Key Personnel
13.2.5. Key Product/Services Offered
13.3. Teletrac Navman US Ltd
13.3.1. Business Overview

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info@marketpublishers.com

13.3.2. Key Revenue and Financials
13.3.3. Recent Developments
13.3.4. Key Personnel
13.3.5. Key Product/Services Offered
13.4. Motive Technologies, Inc.
13.4.1. Business Overview
13.4.2. Key Revenue and Financials
13.4.3. Recent Developments
13.4.4. Key Personnel
13.4.5. Key Product/Services Offered
13.5. Verizon Communications Inc.
13.5.1. Business Overview
13.5.2. Key Revenue and Financials
13.5.3. Recent Developments
13.5.4. Key Personnel
13.5.5. Key Product/Services Offered
13.6. Samsara Inc.
13.6.1. Business Overview
13.6.2. Key Revenue and Financials
13.6.3. Recent Developments
13.6.4. Key Personnel
13.6.5. Key Product/Services Offered
13.7. Garmin Ltd.
13.7.1. Business Overview
13.7.2. Key Revenue and Financials
13.7.3. Recent Developments
13.7.4. Key Personnel
13.7.5. Key Product/Services Offered
13.8. Omnitracs, LLC
13.8.1. Business Overview
13.8.2. Key Revenue and Financials
13.8.3. Recent Developments
13.8.4. Key Personnel
13.8.5. Key Product/Services Offered
13.9. EROAD Inc.
13.9.1. Business Overview
13.9.2. Key Revenue and Financials
13.9.3. Recent Developments
13.9.4. Key Personnel

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13.9.5. Key Product/Services Offered
13.10. Pegasus Transtech, LLC
13.10.1. Business Overview
13.10.2. Key Revenue and Financials
13.10.3. Recent Developments
13.10.4. Key Personnel
13.10.5. Key Product/Services Offered

14. STRATEGIC RECOMMENDATIONS

15. ABOUT US & DISCLAIMER

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