

## **Commercial-Vehicle Telematics Market in Japan: Key Research Findings 2014**

### ◆ **Research Outline**

**Yano Research Institute has conducted a study on the domestic telematics market for commercial vehicles with the following conditions:**

1. Research period: From April to August, 2014
2. Research targets: Vendors of telematics terminals for commercial vehicles in and outside the country.
3. Research methodologies: Face-to-face interviews with expert researchers, surveys via telephone/email, and literature research

#### **What are Commercial-Vehicle Telematics?**

Telematics for commercial vehicles in this research indicates the following six categories:

1) Dynamic vehicle monitoring system terminals, 2) Dynamic vehicle monitoring system terminals for auto-lease vehicles, 3) Complex machines (terminals), 4) Digital tachograph, 5) Drive recorders, and 6) Smartphone-enabled dynamic vehicle monitoring system terminals. Dynamic vehicle monitoring system terminals are used for grasping driving state, fuel efficiency, CO2 emissions, and etc., collected from the traveling information through traffic-center-GPS for environmental purposes. Those smart-phone-enabled types are on-vehicle equipment to be available in 2015 or later, enabling vehicle operations management through applications downloaded in smartphones. Complex machines (terminals) are system terminals that have two of the following functions: Dynamic vehicle monitoring system terminals, digital tachograph, and drive recorders. Digital tachograph works by digitally storing data on speed, time, and distance into a memory. The law revised in 2014 regulates buses, taxis, and 7-ton-and-over trucks to install such digital tachograph. A drive recorder stores driving information, such as accelerated speed and brakes together with camera images, at the time of any impacts, like sudden braking, when an accident or a near-collision incident occurs.

### ◆ **Key Findings**

#### ■ **Shipment Volume of Telematics Terminals for Domestic Commercial Vehicles Projected to Grow Steadily to Attain 1,330 Thousand Units by FY2016**

The total number of telematics terminals for domestic commercial vehicles shipped from manufacturers during FY2013 was 552,000 terminals, and expected to rise to 1,333,850 by FY2016. This is partly because of a subsidy and other governmental supports aimed to increase telematics-terminal users. Another market growth factor is increasing number of telematics terminals expected to be embedded in the white-number commercial vehicles, that may potentially develop the business of big data analysis using information from telematics terminals installed in vehicles.

#### ■ **Commercial-Vehicle Telematics Market for FY2030 Projected to Attain 4 Million Units, Further Growth May Be Expected According to Demands for Big Data Analysis**

The big data analysis business utilizing vehicle data and dynamic operation information

collected from telematics terminals is likely to be fully established in the future. Although this research currently forecasts the shipment volume of telematics terminals for commercial vehicles from manufacturers to be 4 million by FY2030, it may become larger if big data analysis business successfully expands.

◆ **Report format:**

Published report: “Connected Cars/Telematics Services for Commercial Vehicles 2014”

Issued on: September 5, 2014

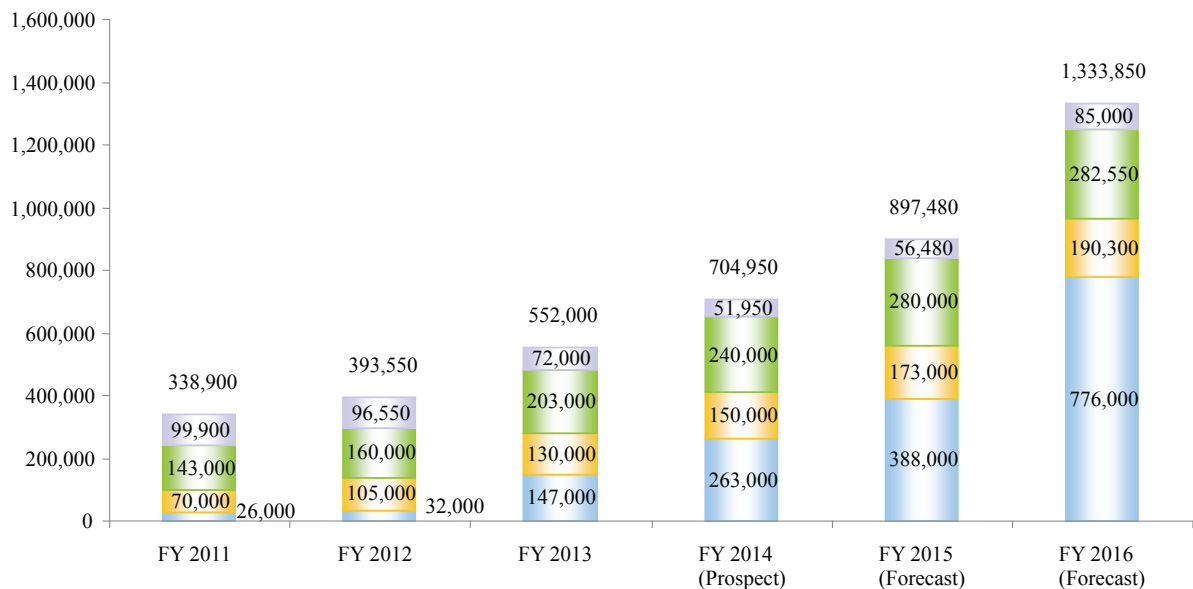
Language: Japanese

Format: 257 pages in A4 format

Price: 150,000 yen (The consumption tax shall additionally be charged for the sales in Japan.)

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■ **Figure & Table 1: Transition and Forecast of Shipment Volume of Telematics Terminals for Commercial Vehicles**



Shipment Volume	2011	2012	2013	2014	2015	2016	2011-2016 Average Annual Growth Rate
① Dynamic vehicle monitoring system terminals (excl. auto-lease vehicles)	26,000	32,000	147,000	263,000	388,000	776,000	97.2%
② Dynamic vehicle information system terminals of auto-lease vehicles	70,000	105,000	130,000	150,000	173,000	190,300	22.1%
③ Complex Machines (Terminals)	143,000	160,000	203,000	240,000	280,000	282,550	14.6%
④ Stand-alone Digital Tachograph/ Stand-alone Drive Recorder	99,900	96,550	72,000	51,950	56,480	85,000	-3.2%
<b>Total Major Items of Commercial-Vehicle Telematics Terminals</b>	<b>338,900</b>	<b>393,550</b>	<b>552,000</b>	<b>704,950</b>	<b>897,480</b>	<b>1,333,850</b>	<b>31.5%</b>

Notes

- The numeric values are based on the shipment volume from manufacturers
- Telematics for commercial vehicles in this research indicates the following six categories: 1) Dynamic vehicle monitoring system terminals, 2) Dynamic vehicle monitoring system terminals for auto-lease vehicles, 3) Complex machines (terminals), 4) Digital tachograph, 5) Drive recorders, and 6) Smartphone-enabled dynamic vehicle monitoring system terminals.