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Frost Radar™: Commercial Vehicle Telematics in North America, 2026



A Benchmarking System to Spark Companies to Action - Innovation That Fuels New Deal Flow and Growth Pipelines

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Strategic Imperative and Growth Environment



List of Abbreviations

- **ACV:** Annual Contract Value
- **ADAS:** Advanced Driver Assistance System
- **AI:** Artificial Intelligence
- **AIoT:** Artificial Intelligence of Things
- **API:** Application Programming Interface
- **ARR:** Annual Recurring Revenue
- **ARPU:** Average Revenue Per User
- **CAN:** Controller Area Network
- **CV:** Commercial Vehicle
- **DTC:** Diagnostic Trouble Code
- **DTNA:** Daimler Truck North America
- **EBITDA:** Earnings Before Interest, Taxes, Depreciation, and Amortization
- **ECM:** Engine Control Module
- **eDVIR:** Electronic Driver Vehicle Inspection Report
- **EV:** Electric Vehicle
- **GAAP:** Generally Accepted Accounting Principles
- **GDP:** Gross Domestic Product
- **GPS:** Global Positioning System
- **GSA:** General Services Administration
- **IFTA:** International Fuel Tax Agreement
- **IMU:** Inertial Measurement Unit
- **IoT:** Internet of Things
- **IPO:** Initial Public Offering
- **KPI:** Key Performance Indicator
- **MCP:** Model Context Protocol
- **MV:** Motor Vehicle
- **OEM:** Original Equipment Manufacturer
- **R&D:** Research and Development
- **ROI:** Return on Investment
- **SaaS:** Software as a Service
- **SMB:** Small and Medium-sized Business
- **TMS:** Transportation Management System
- **TPMS:** Tire Pressure Monitoring System
- **TSP:** Telematics Service Provider
- **VIN:** Vehicle Identification Number

Source: Frost & Sullivan

Strategic Imperative

- Telematics providers need to move beyond basic tracking, ELD, and compliance and become broader fleet operating platforms. Growth is increasingly coming from adjacent areas, such as video safety, maintenance, routing, asset tracking, fuel, workforce, payments, and energy management.
- AI and proprietary fleet data will be major competitive differentiators as basic telematics capabilities become similar across vendors. Companies with large connected vehicle bases can use first-party data to improve driver safety, predictive maintenance, routing, fuel efficiency, and automated decision-making.
- Ecosystems and partnerships will become an important source of competitive advantage. Marketplace integrations extend a telematics platform into video, routing, maintenance, insurance, fuel, TMS, and other applications without building every capability internally. Vendors need strong APIs, technology partnerships, OEM relationships, channel partners, and third-party applications to create broader solutions and increase customer stickiness.
- OEM connectivity and interoperability will become critical as fleets operate mixed vehicle and technology environments. Factory-installed telematics can reduce hardware installation costs and deployment time, while open platforms allow fleets to combine OEM data, aftermarket devices, cameras, sensors, and third-party applications.
- The technology layer in the CV telematics market is no longer about data collection, analysis, and integration. It has evolved to be about automated, intelligent action at the vehicle and fleet levels. AI is replacing dashboards as the product. The revenue generator is now software that acts proactively and helps fleet managers stay on top of operations.

Source: Frost & Sullivan

Strategic Imperative (continued)

- Platforms monetizing outcome-based ROI (cost avoided, incident prevented) will be pulling the ARPU subscription-only peers. The market is soon evolving into AI-native and agentic AI platforms that compound these advantages. Platforms will recommend and initiate actions rather than displaying analysis and reports. Fleet managers will shift from building reports to approving AI-generated decisions.
- Platform consolidation will accelerate across the industry. Providers aggressively expand through acquisitions and internal product development to become full-stack fleet operating systems for safety, compliance, maintenance, payments, and workforce management. The market rewards breadth, as experienced by the strongest vendors that have the broadest partner ecosystems connecting operational, financial, and vehicle data into a single stack. Stand-alone point solutions need to act fast and transition.
- Scale and consolidation will remain important, but acquisition-led growth needs to translate into organic expansion and stronger customer monetization.
- Compliance and litigation have made telematics requisite. Fleets without compliant, video-equipped telematics face insurance setbacks. This converts telematics and fleet management solutions from a productivity tool into a necessary line item to be immune to false insurance claims and fluctuating freight cycles.

Source: Frost & Sullivan

Growth Environment

- The North American commercial vehicle telematics market has a strong growth environment as fleets move from basic tracking to broader digital fleet management. This creates multiple opportunities for vendors to increase revenue from existing customers while also expanding into adjacent fleet functions.
- Enterprise and large commercial fleets are becoming an important growth pool as telematics adoption moves deeper into complex fleet operations. Large customers are buying multiple solutions rather than using telematics only for vehicle tracking and compliance. This creates opportunities for vendors to expand account value through cross-selling, while also increasing competition for major fleets.
- The market is increasing the addressable market beyond traditional trucking into adjacent applications, such as trailers, non-powered assets, video safety, insurance, EVs, fuel management, and industrial equipment.
- The North American market continues to provide significant opportunities for consolidation as smaller and midsized providers compete with increasingly scaled platforms. Companies that successfully combine acquired customer bases with broader platforms can create additional recurring revenue opportunities.
- Growth is shifting to higher-value software, AI, and data-driven services rather than hardware-led telematics subscriptions alone. Fleets are looking for measurable outcomes, such as fewer accidents, lower fuel costs, improved maintenance, better compliance, and higher asset utilization. This creates room for vendors to move toward higher-value solutions and outcome-based offerings.

Source: Frost & Sullivan

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Frost Radar™: Commercial Vehicle Telematics in North America



Frost Radar™: Commercial Vehicle Telematics in North America



25+
qualified participants

10
selected

- **Inclusion Criteria:** Strong growth, innovation leadership, and measurable market impact.
- **Exclusion Criteria:** Insufficient scale, weak differentiation, or limited data transparency.
- **Evaluation Approach:** Global analysts; rigorous, fact-based methodology.
- **Benchmarking Methodology:** Proprietary framework delivering fair, consistent, global comparison.

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Source: Frost & Sullivan

Frost Radar™: Competitor Categories

GROWTH CHAMPIONS

- Achieve significant market growth through effective execution.
- Leverage proven technologies and scalable business models.
- Maintain competitiveness via operational efficiency and customer focus.
- Require increased innovation investment for sustained leadership.

VISIONARY LEADERS

- Market leaders with strong balance of innovation and growth.
- Deliver transformative technologies, business models, and processes.
- Influence industry direction and set new benchmarks.
- Combine strategic vision with operational excellence for market dominance.

CONTENDERS

- Emerging players with modest market presence and cautious strategies.
- Often new entrants or niche participants establishing their position.
- Emphasizes continuous improvement and ensures operational reliability.
- Hold potential for growth through innovation, alliances, and market expansion.

INNOVATORS

- Drive technological advancement with disruptive ideas and solutions.
- Prioritize R&D, IP development, and pioneering concepts.
- Strong innovation foundation with opportunities to accelerate commercialization and scale.
- Benefit from strategic partnerships and targeted go-to-market strategies.

Source: Frost & Sullivan

Frost Radar™ Competitive Environment

- Geotab has the largest independent fleet base and strong OEM data integration. Its open Marketplace adds hundreds of partner applications, creating a broad ecosystem that supports scale, growth, and continued investment in data science.
- Samsara combines around 30% ARR growth at more than $1 billion scale with strong R&D investment. Its Connected Operations platform extends beyond telematics into equipment, sites, safety, and workflows, supporting its strong innovation position.
- Motive is gaining share quickly in trucking, supported by AI dashcams and a second growth engine in spend management. Its coverage across safety, dispatch, compliance, and fuel payments strengthens its overall innovation position.
- Lytx has one of the industry's largest proprietary driving-video datasets, supporting continuous improvements in machine vision. Growth is steadier as video safety matures, while its strong North American focus limits geographic expansion.
- Powerfleet’s mergers and acquisitions have created meaningful global scale along with its Unity platform. However, growth remains largely acquisition-driven, while ongoing integration limits the pace of product innovation compared with leading players.
- Platform Science benefits from Trimble's transportation telematics assets and OEM partnerships with Daimler, PACCAR, and Navistar. Factory-fit distribution provides strong growth potential, although its application portfolio remains narrower than the leading platforms.
- Azuga leverages Bridgestone’s strong distribution through its service network and tire-related customer relationships. This supports steady SMB growth, although its core tracking and safety offering has less AI and technology differentiation.

Source: Frost & Sullivan

Frost Radar™ Competitive Environment

- The North American commercial vehicle telematics market is highly competitive, with large scaled providers, such as Geotab, Samsara, and Motive, competing alongside established players including Verizon Connect, Powerfleet, Solera, and Teletrac Navman.
- Competition is increasingly based on platform breadth, AI capabilities, video, integrations, customer experience, and enterprise coverage rather than basic vehicle tracking. This is putting pressure on smaller providers to differentiate through specific verticals, pricing, specialized capabilities, or stronger customer relationships.
- Competition is shifting from individual telematics products to broader platforms that combine multiple fleet functions. Geotab, Samsara, and Motive are expanding across video, safety, maintenance, routing, assets, workforce, fuel, and spend management, increasing the value of their platforms. This creates stronger customer lock-in and raises competitive pressure on vendors with narrower product portfolios. Providers need to demonstrate how multiple solutions work together rather than compete on tracking features alone.
- The enterprise segment is becoming a major competitive battleground, while smaller fleets remain more price-sensitive and fragmented. Large fleets expect scalable platforms, strong integrations, compliance capabilities, advanced analytics, and dedicated support, favoring vendors with broader technology and financial resources.
- The top five vendors hold roughly half of all active units in North America. Recent huge deals including Geotab's acquisition of Verizon Connect's international business, Platform Science absorbing Trimble's telematics unit, Powerfleet's merger with MiX Telematics and acquisition of Fleet Complete, and GPS Trackit's acquisition of Zonar have all effectively consolidated the market further.

Source: Frost & Sullivan

Frost Radar™ Competitive Environment (continued)

- The competitive advantage is moving toward data, AI, ecosystems, and interoperability, making it harder for smaller, stand-alone providers to compete on technology breadth alone.
- Installed base counts and geographic coverage are traditional competitive metrics that are still relevant for benchmarking tools. However, these alone do not determine future winners. Expansion of revenue in existing accounts is crucial. Samsara's $1.9 billion ARR at about 30% growth and Motive's $501 million ARR with about 126% net dollar retention among large customers demonstrate that AI-driven upsell using video, coaching, maintenance and workflow automation are crucial for future growth.
- Multiproduct customer penetration is a crucial indicator of competitive success. Approximately 90% of Samsara's $100,000+ customers use two or more products, and more than 70% use three or more. Geotab has the broadest open marketplace (more than 530 solutions and about 350 partners) and leverages an extensive reseller model but trades direct customer control with distribution scale. The real competitive test is how much revenue can be generated per truck per year.
- A competitive shift is happening between the aftermarket model and OEM factory-embedded connectivity. Platform Science's acquisition of Trimble, backed by equity from Daimler, PACCAR, and Cummins, created a purpose-built OEM-native platform spanning factory-installed devices and aftermarket retrofits.

Source: Frost & Sullivan

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Frost Radar™: Companies to Action



Samsara

VISIONARY LEADER

INNOVATION SCORE **5.00**

GROWTH SCORE **4.90**

INNOVATION

- Samsara is known for its increasingly open ecosystem. The platform connects third-party devices, systems, and data through APIs and integrations alongside Samsara's own hardware and software. Initiatives such as Samsara Community and Agent Studio expand this ecosystem by connecting customers, internal data, and customer-specific workflows.
- Samsara's core innovation strategy can be identified through its platform breadth. The Connected Operations Cloud brings together video safety, vehicle telematics, equipment monitoring, workforce applications, and site visibility into a unified platform. With about 98% of revenue coming from subscriptions, the integrated model supports strong customer expansion across multiple products.
- Samsara continues to invest heavily in R&D as investments reached $97.6 million in Q1 FY 2027, up from $83.2 million a year earlier. About 20% of revenue spend on R&D shows that the company continues to prioritize innovation.
- AI is becoming a major innovation moat for Samsara. AI-driven emerging products contributed more than 20% of net new ACV for two consecutive quarters, up from 8% previously, and has already exceeded $100 million in ARR. This demonstrates Samsara's ability to convert R&D investments into commercially successful products relatively quickly.
- A strong advantage supporting its AI strategy is its broad data coverage. The company reportedly captures more than 25 trillion data points annually, creating a large data foundation for training and powering AI models designed for innovative real-world applications.

Source: Frost & Sullivan

Samsara (continued)

VISIONARY LEADER

INNOVATION SCORE **5.00**

GROWTH SCORE **4.90**

INNOVATION

- Samsara is expanding into waste management, road infrastructure, and public transit. The Waste Intelligence, Ground Intelligence, and Ridership Management solution launches allow the company to capture new growth opportunities beyond traditional fleet applications.
- Innovation scalability at Samsara is becoming tangible as it introduces new use cases across its installed base with limited incremental deployment costs, giving it a market advantage in product breadth and the speed and economics with which it can turn emerging technologies into commercial fleet outcomes. For example, Ground Intelligence uses Samsara's existing dashcam network to identify potholes in roads without requiring additional hardware.

Source: Frost & Sullivan

Samsara (continued)

VISIONARY LEADER

INNOVATION SCORE **5.00**

GROWTH SCORE **4.90**

GROWTH

- Samsara has maintained one of the most consistent growth rates among fleet management SaaS providers at scale. Its revenue has increased every year since its IPO, reaching around 30% growth in FY 2026 while ARR surpassed $1.99 billion. Sustaining this growth at such scale is notable, as growth typically slows as software companies become larger.
- The company has observed three consecutive quarters of GAAP profitability with its enterprise customer concentration climbing steadily. More than 3,000 customers each contribute more than $100,000 in ARR which equates to approximately 61% of the company's total ARR.
- Samsara had 164 customers contributing more than $1 million in ARR as of Q3 FY 2026. This customer group grew ARR by 56–62% year over year and now contributes more than 20% of total ARR.
- Samsara's reported revenue increased consistently from $367 million in Q1 FY 2026 to $479 million in Q1 FY 2027, representing roughly 31% year-over-year growth in the latest quarter. The progression across every quarter indicates strong revenue visibility and execution. Strategically, this supports investment in customer acquisition and product expansion while providing a solid foundation for scaling profitability.
- More than 20% of its recent net new ACV came from newer products, such as AI Agents, AI Multicam, Wearable represent a genuine second growth platform layered on top of core telematics. This indicates the company's strong future growth pipeline.

Source: Frost & Sullivan

Samsara (continued)

VISIONARY LEADER

INNOVATION SCORE **5.00**

GROWTH SCORE **4.90**

GROWTH

- Samsara is leaving its mark well beyond fleet telematics, as it has evolved into a broader Connected Operations Platform, targeting industries that together represent more than 40% of global GDP, including transportation, construction, logistics, utilities, field services, manufacturing, and the public sector.
- The company already serves seven of the top 10 food-service companies, seven of the top 10 waste management companies, and five of the top 10 wholesale/retail companies. More than 95% of large customers use two or more Samsara products, supporting 115% dollar-based net revenue retention.
- Samsara reportedly invested more than $200 million in sales and marketing in Q1 FY 2027, which roughly equates to more than 42% of its quarterly revenue. The company is investing heavily in acquiring and expanding customers, while still generating approximately $7.2 million of operating income in its latest quarter reporting. This indicates a significant investment in growth.
- While North America remains Samsara's core market, other markets contributed around 15% of net new ACV in Q4 FY 2026, highlighting traction outside the region.
- Samsara is combining customer expansion, cross-selling, enterprise growth, and international expansion while maintaining a disciplined approach to scaling the business, reflecting strong public market discipline.

Source: Frost & Sullivan

Samsara (continued)

VISIONARY LEADER

INNOVATION SCORE **5.00**

GROWTH SCORE **4.90**

FROST PERSPECTIVE

- Frost & Sullivan finds that Samsara's growth clearly remains strong at scale: the company is sustaining around 30% growth even after reaching nearly $2 billion in ARR, which is notable for a SaaS company of its size. AI is becoming a meaningful driver for this growth as its AI products have surpassed $100 million in ARR and now contribute more than 20% of new business, showing that AI is already translating into revenue rather than being just an R&D investment.
- The company's profitability marks an inflection point as three consecutive quarters of GAAP profitability show that Samsara is improving its operating leverage while still maintaining high growth rates.
- Samsara's expansion beyond traditional fleets is gaining traction with strong activity in warehouse operations and logistics companies.
- Frost & Sullivan determined that Samsara has reached considerable profitability but with limited margin and headroom. While the company posted approximately $44 million in net income in the latest quarterly report, it is observed that growth remains investment heavy. Its operational expenditure is more than 70% of its revenue, indicating that sustaining current high growth rates over a long period of time requires significant investment before spending normalizes, leading to normalized growth.

Source: Frost & Sullivan

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Best Practices & Growth Opportunities



Best Practices

1. Build a broad, integrated fleet platform rather than competing on basic telematics alone. Companies can create a clear land-and-expand model that starts with an essential fleet need and gradually adds higher-value solutions.

2. Use proprietary data and AI to deliver measurable fleet outcomes rather than simply adding AI features. Companies should combine vehicle, driver, video, maintenance, fuel, and operational data to identify risks, predict failures, improve efficiency, and automate routine decisions.

3. Create an open ecosystem that supports OEM connectivity, third-party hardware, and strategic partnerships. Fleets increasingly operate mixed vehicle and technology environments, so companies should avoid forcing customers to replace equipment. Strong APIs, OEM integrations, partner marketplaces, and telecom relationships can expand platform capabilities faster than building internally.

Source: Frost & Sullivan

Growth Opportunities

1. Shift from device or subscription-based pricing alone to business models tied to measurable fleet outcomes, such as safety improvements, fuel savings, uptime, or maintenance cost reduction. This aligns vendor incentives with customer ROI while improving customer retention and differentiation.

2. Build a direct data pipeline to underwriters and brokers so telematics and video evidence feeds into the risk model that sets the premium for fleets. TSPs can position themselves between fleets and insurers and capture a 10–20% premium difference and lock in the fleet into the TSP ecosystem at renewal time, which will make the insurer an upselling partner.

3. Extend platforms beyond trucks to trailers, containers, chassis, cargo, and other non-powered assets while integrating freight visibility and logistics workflows. This expands the unified operational platform and unlocks new recurring revenue opportunities across the value chain.

Source: Frost & Sullivan

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Frost Radar™ Analytics



Frost Radar™: Benchmarking Future Growth Potential
2 Major Indices, 10 Analytical Ingredients, 1 Platform

Growth Index

Growth Index (GI) is a measure of a company's growth performance and track record, along with its ability to develop and execute a fully aligned growth strategy and vision; a robust growth pipeline system; and effective market, competitor, and end-user focused sales and marketing strategies.

GI1

MARKET SHARE (PREVIOUS 3 YEARS)
This is a comparison of a company's market share relative to its competitors in a given market space for the previous 3 years.

GI2

REVENUE GROWTH (PREVIOUS 3 YEARS)
This is a look at a company's revenue growth rate for the previous 3 years in the market/industry/category that forms the context for the given Frost Radar™.

GI3

GROWTH PIPELINE
This is an evaluation of the strength and leverage of a company's growth pipeline system to continuously capture, analyze, and prioritize its universe of growth opportunities.

GI4

VISION AND STRATEGY
This is an assessment of how well a company's growth strategy is aligned with its vision. Are the investments that a company is making in new products and markets consistent with the stated vision?

GI5

SALES AND MARKETING
This is a measure of the effectiveness of a company's sales and marketing efforts in helping it drive demand and achieve its growth objectives.

Source: Frost & Sullivan

Frost Radar™: Benchmarking Future Growth Potential
2 Major Indices, 10 Analytical Ingredients, 1 Platform (continued)

Innovation Index

Innovation Index (II) is a measure of a company's ability to develop products/ services/ solutions (with a clear understanding of disruptive megatrends) that are globally applicable, are able to evolve and expand to serve multiple markets and are aligned to customers' changing needs.

II1

INNOVATION SCALABILITY
This determines whether an organization's innovations are globally scalable and applicable in both developing and mature markets, and also in adjacent and non-adjacent industry verticals.

II2

RESEARCH AND DEVELOPMENT
This is a measure of the efficacy of a company's R&D strategy, as determined by the size of its R&D investment and how it feeds the innovation pipeline.

II3

PRODUCT PORTFOLIO
This is a measure of a company's product portfolio, focusing on the relative contribution of new products to its annual revenue.

II4

MEGATRENDS LEVERAGE
This is an assessment of a company's proactive leverage of evolving, long-term opportunities and new business models, as the foundation of its innovation pipeline. An explanation of megatrends can be found here.

II5

CUSTOMER ALIGNMENT
This evaluates the applicability of a company's products/services/solutions to current and potential customers, as well as how its innovation strategy is influenced by evolving customer needs.

Source: Frost & Sullivan

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Next Steps: Leveraging the Frost Radar™ to Empower Key Stakeholders



Significance of Being on the Frost Radar™

Companies plotted on the Frost Radar™ are the leaders in the industry for growth, innovation, or both. They are instrumental in advancing the industry into the future.

GROWTH POTENTIAL

Your organization has significant future growth potential, which makes it a Company to Action.

BEST PRACTICES

Your organization is well positioned to shape Growth Pipeline™ best practices in your industry.

COMPETITIVE INTENSITY

Your organization is one of the key drivers of competitive intensity in the growth environment.

CUSTOMER VALUE

Your organization has demonstrated the ability to significantly enhance its customer value proposition.

PARTNER POTENTIAL

Your organization is top of mind for customers, investors, value chain partners, and future talent as a significant value provider.

Source: Frost & Sullivan

Frost Radar™ Empowers the CEO's Growth Team

STRATEGIC IMPERATIVE

- Growth is increasingly difficult to achieve.
- Competitive intensity is high.
- More collaboration, teamwork, and focus are needed.
- The growth environment is complex.

LEVERAGING THE FROST RADAR™

- The Growth Team has the tools needed to foster a collaborative environment among the entire management team to drive best practices.
- The Growth Team has a measurement platform to assess future growth potential.
- The Growth Team has the ability to support the CEO with a powerful Growth Pipeline™.

NEXT STEPS

- **Growth Pipeline Audit™**
- **Growth Pipeline as a Service™**
- **Growth Pipeline™ Dialogue with Team Frost**

Source: Frost & Sullivan

Frost Radar™ Empowers Investors

STRATEGIC IMPERATIVE

- Deal flow is low and competition is high.
- Due diligence is hampered by industry complexity.
- Portfolio management is not effective.

LEVERAGING THE FROST RADAR™

- Investors can focus on future growth potential by creating a powerful pipeline of Companies to Action for high-potential investments.
- Investors can perform due diligence that improves accuracy and accelerates the deal process.
- Investors can realize the maximum internal rate of return and ensure long-term success for shareholders
- Investors can continually benchmark performance with best practices for optimal portfolio management.

NEXT STEPS

- **Growth Pipeline™ Dialogue**
- **Opportunity Universe Workshop**
- **Growth Pipeline Audit™ as Mandated Due Diligence**

Source: Frost & Sullivan

Frost Radar™ Empowers Customers

STRATEGIC IMPERATIVE

- Solutions are increasingly complex and have long-term implications.
- Vendor solutions can be confusing.
- Vendor volatility adds to the uncertainty.

LEVERAGING THE FROST RADAR™

- Customers have an analytical framework to benchmark potential vendors and identify partners that will provide powerful, long-term solutions.
- Customers can evaluate the most innovative solutions and understand how different solutions would meet their needs.
- Customers gain a long-term perspective on vendor partnerships.

NEXT STEPS

- **Growth Pipeline™ Dialogue**
- **Growth Pipeline™ Diagnostic**
- **Frost Radar™ Benchmarking System**

Source: Frost & Sullivan

Frost Radar™ Empowers the Board of Directors

STRATEGIC IMPERATIVE

- Growth is increasingly difficult; CEOs require guidance.
- The Growth Environment requires complex navigational skills.
- The customer value chain is changing.

LEVERAGING THE FROST RADAR™

- The Board of Directors has a unique measurement system to ensure oversight of the company's long-term success.
- The Board of Directors has a discussion platform that centers on the driving issues, benchmarks, and best practices that will protect shareholder investment.
- The Board of Directors can ensure skillful mentoring, support, and governance of the CEO to maximize future growth potential.

NEXT STEPS

- **Growth Pipeline Audit™**
- **Growth Pipeline as a Service™**

Source: Frost & Sullivan

Next Steps



JOIN:
Growth Council

APPLY:
Companies to Action

ENGAGE:
Growth Dialog

PARTICIPATE:
Growth Council Think Tank

Does your current system support rapid adaptation to emerging opportunities?

Source: Frost & Sullivan

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