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Electronic Container Tracking Survey



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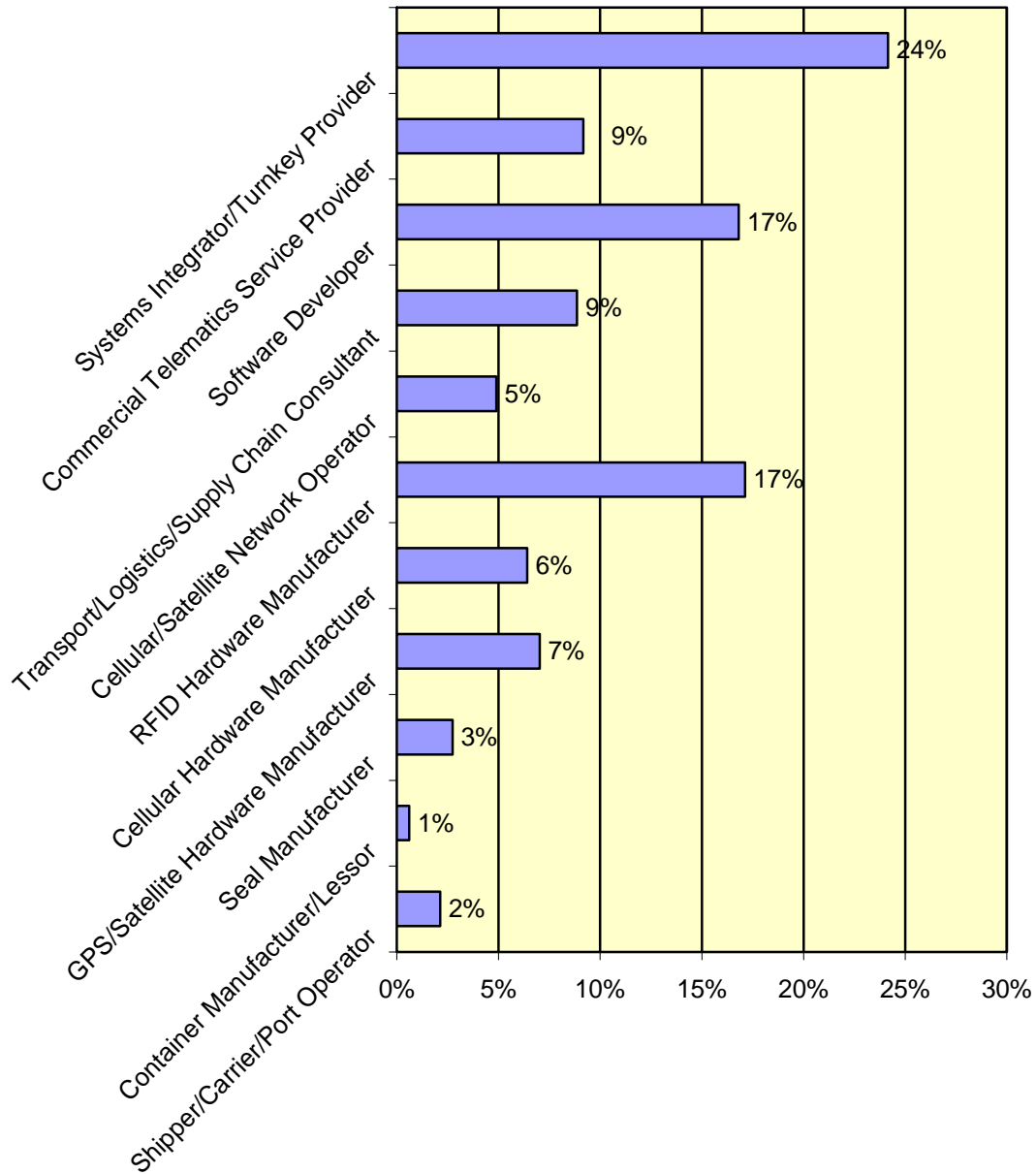
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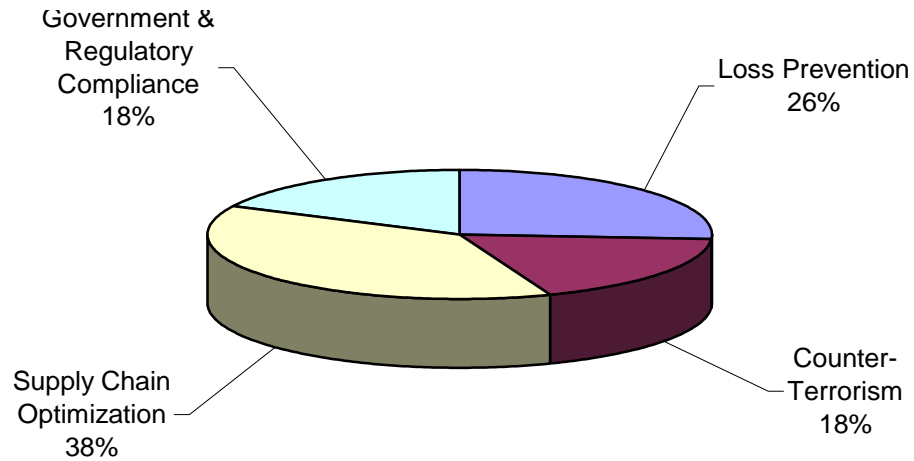
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Question 1: Please Categorize Your Organization



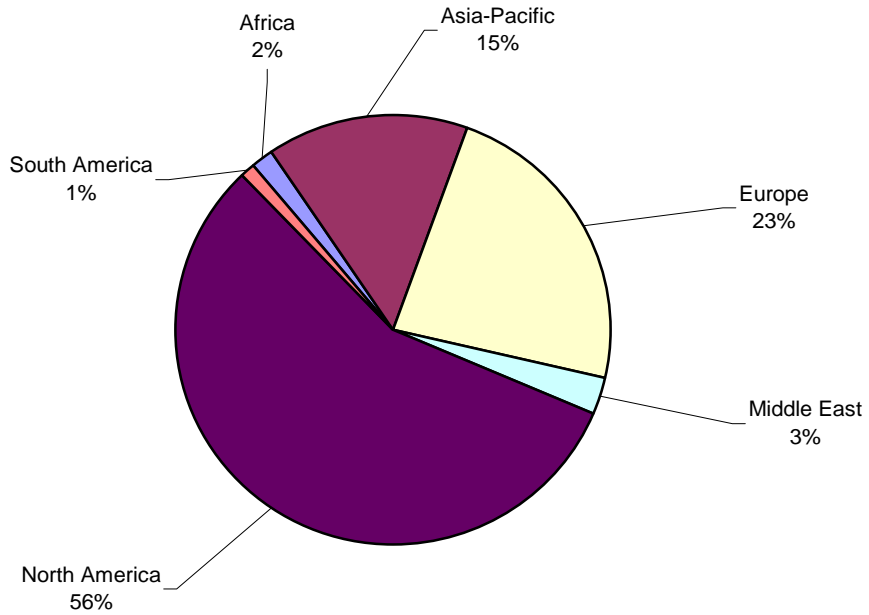
Source: ABI Research

Question 2: What Is the Primary Focus of Your Company?

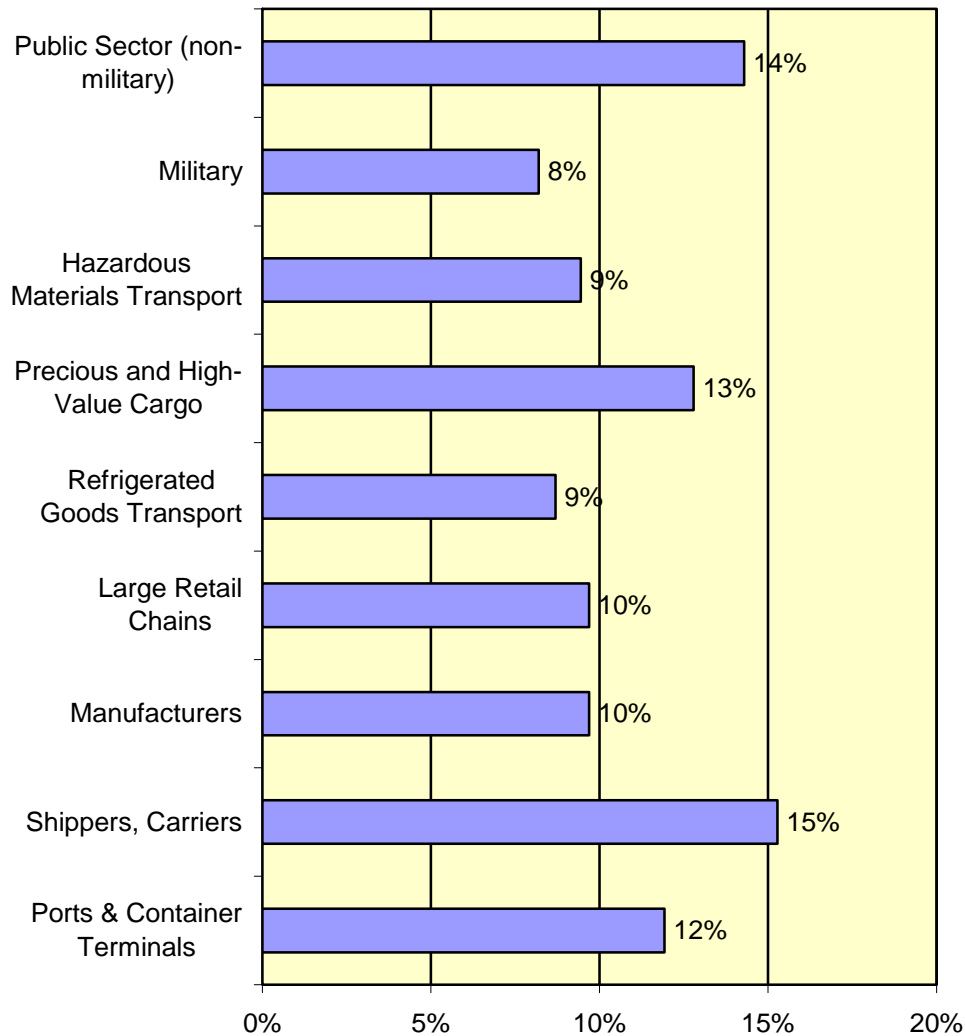


Source: ABI Research

Question 3: Where Is Your Company's Primary Headquarters?

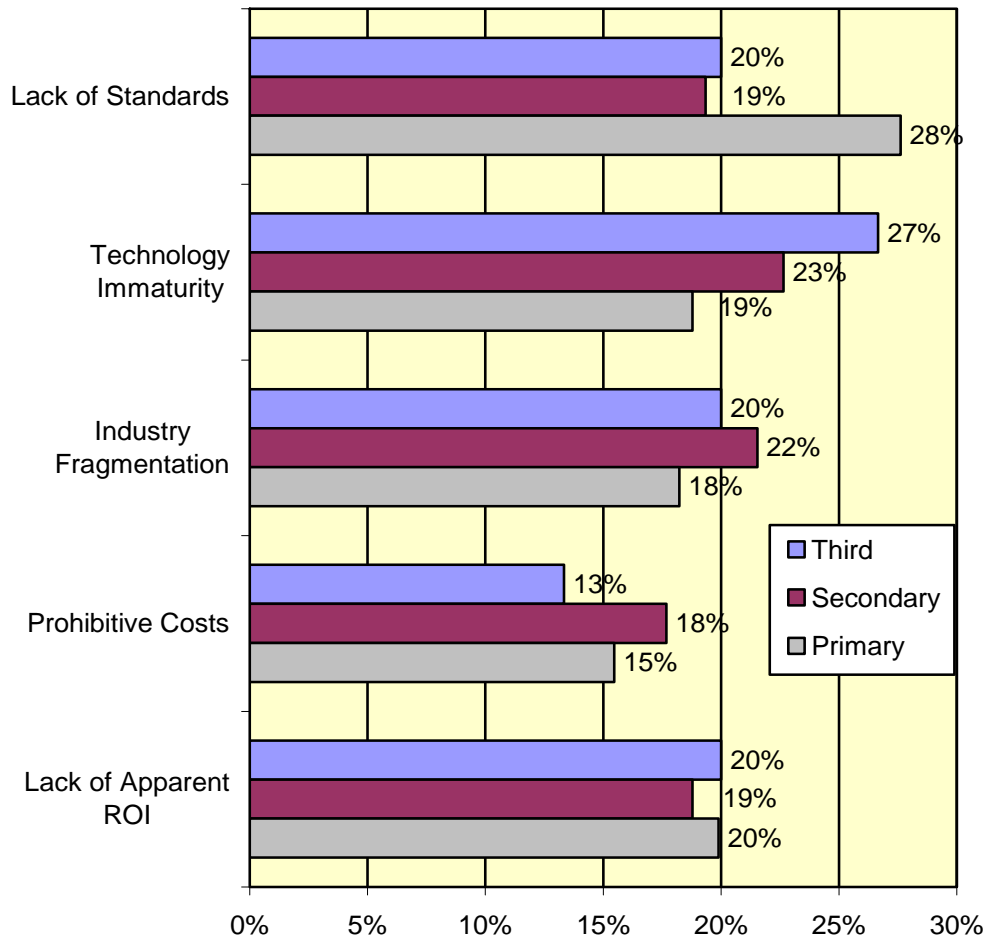


Source: ABI Research

Question 4: Who Do You See as Your Primary End-use Customer?

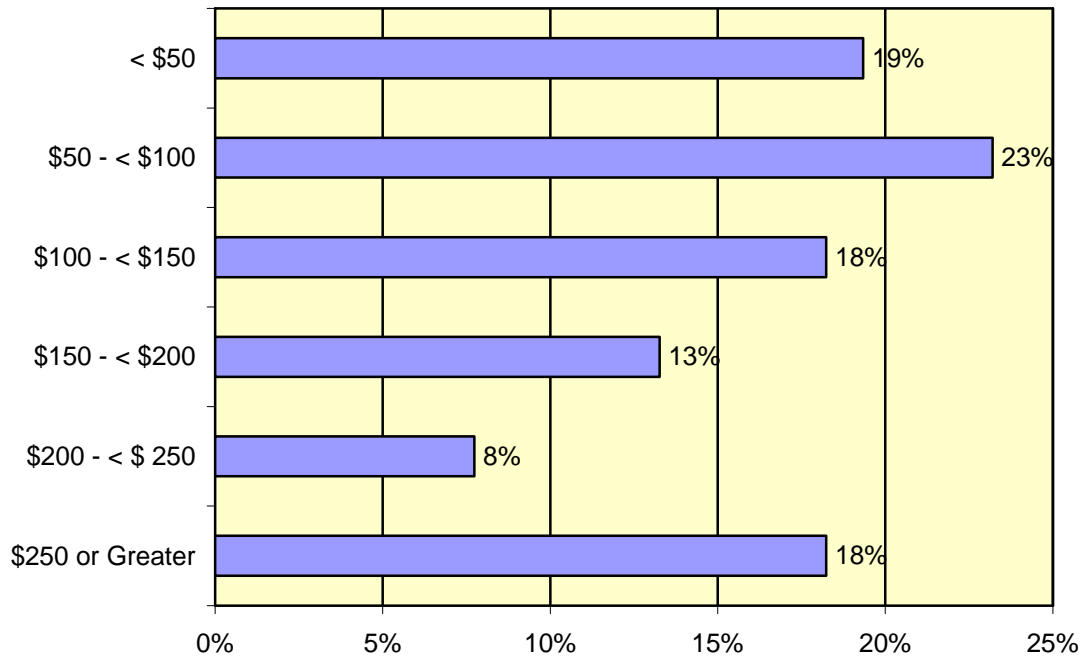
Source: ABI Research

**Question 5: Please Rank the Leading Market Barriers
(1 = Largest Barrier)**



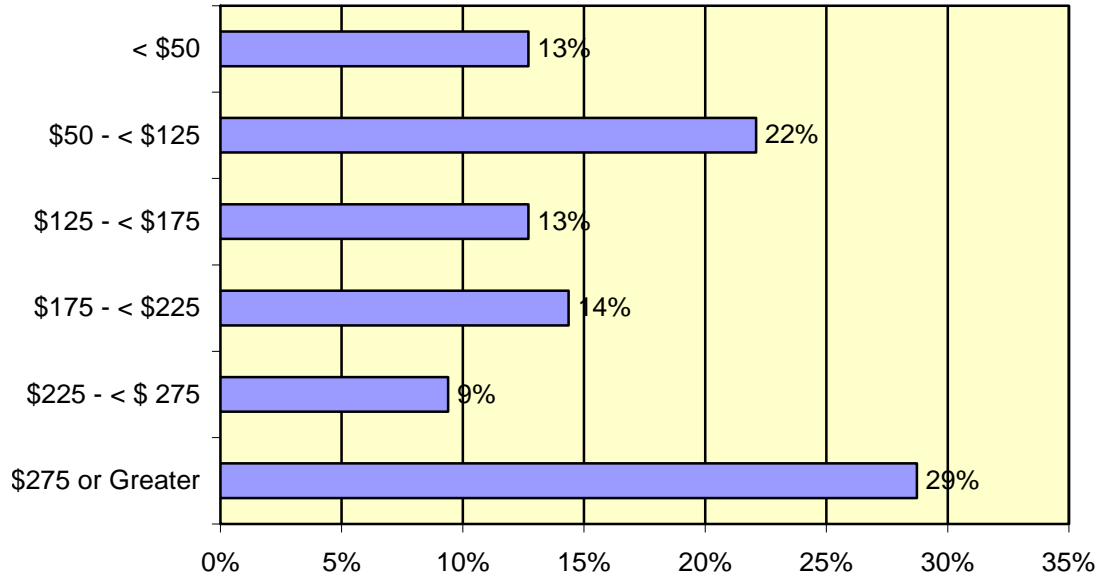
Source: ABI Research

Question 6: What Do You See as the Basic Annual Subscription Fee for Cellular?



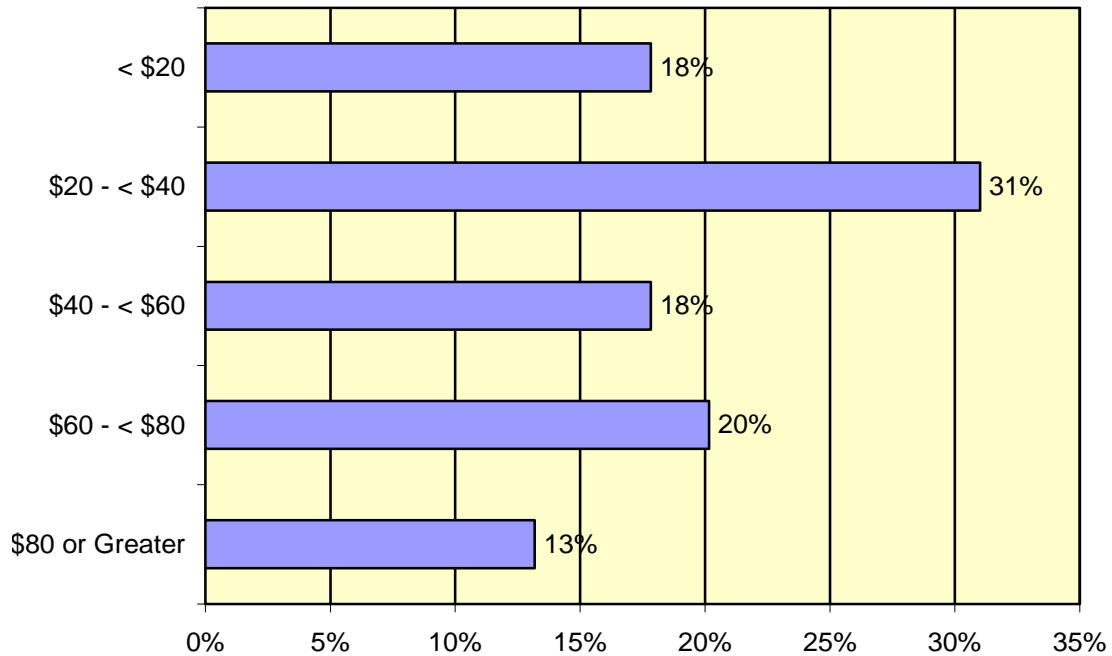
Source: ABI Research

Question 7: What Do You See as the Basic Annual Subscription Fee for Satellite?



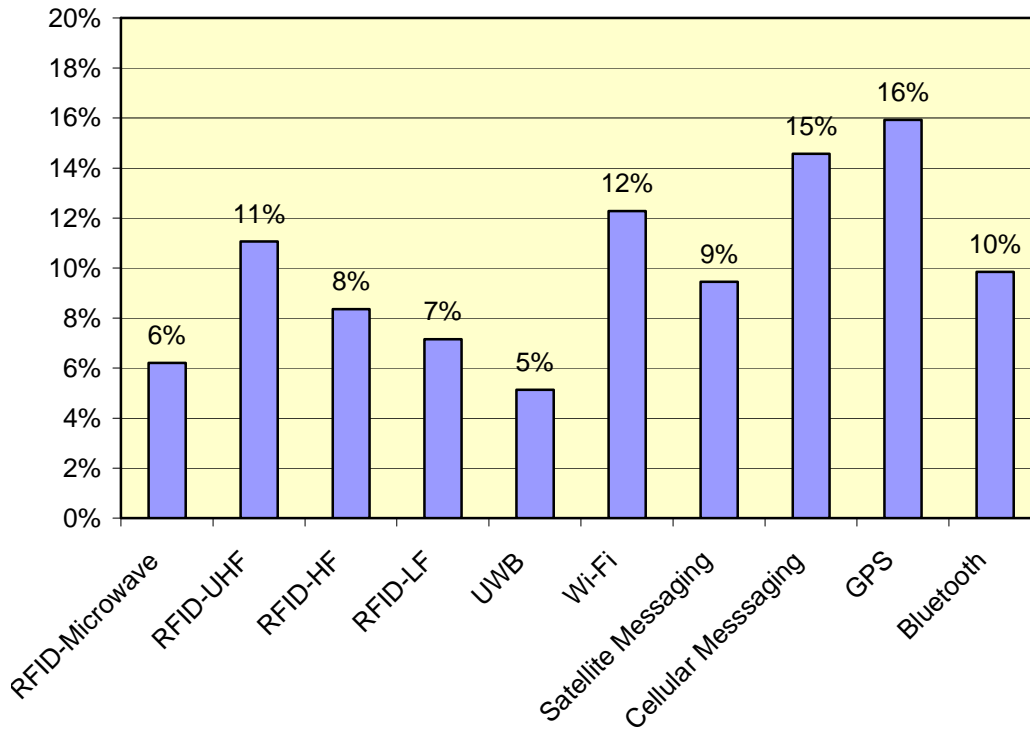
Source: ABI Research

Question 8: What Do You See as the Basic Annual Subscription Fee for RFID?



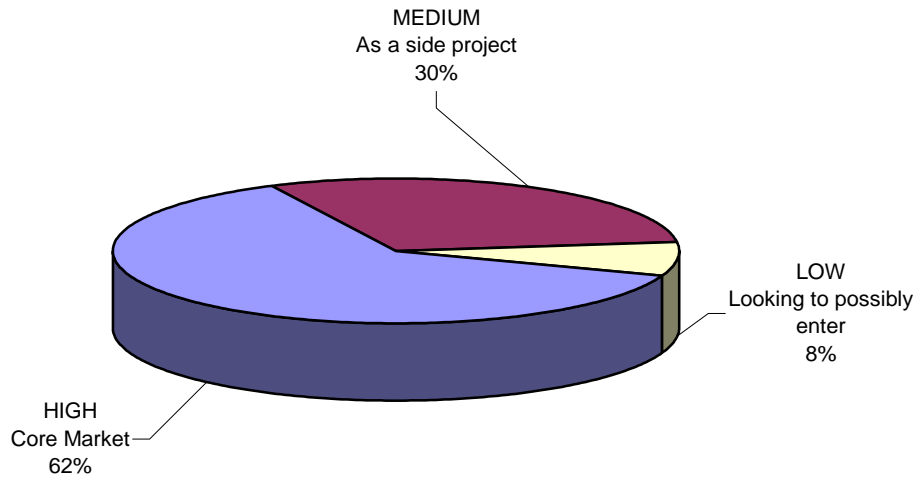
Source: ABI Research

Question 9: Do Your Solutions Use and/or Are They Compatible with the Following Technologies:



Source: ABI Research

Question 10: Please Describe Your Focus on Container Tracking



Source: ABI Research

Question 12: Is there Anything Else You Would like to Highlight About the Market for Electronic Container Tracking?

(Some Highlights)

"The market does not appear to be ready to act until there is strong government legislation or strong business cases made. Because the chain of custody changes many times along the supply route, the question as to who should pay for new technology remains unanswered."

"The requirement is global and the solutions must either adapt to the multi-platform wireless networks, or create a new, dedicated, and standardized network for container and cargo tracking."

"Big market, no standards, and many big players; however, the market is still open to all."

"Lack of mandates by government prevents widespread adoption of container tracking solutions. Since a carrier's adoption of any container tracking solution will inherently add cost in a commodity-priced market, they perceive that adoption will make them less competitive. Carriers need to become better educated about the ROI prospects of container tracking in relation to better asset management and control, but this creates a "chicken & egg"-type syndrome, since no company has adopted a solution as of yet. There is a better solution; for example, chassis tracking inside and outside a terminal can accelerate customer fulfillment, boost asset utilization, reduce labor costs, reduce administration costs, and more, while also offering FREE container tracking when chassis are carrying containers."

"A container costs less than \$1500 and can spend most, if not all of its time, sitting in a yard. Technology solutions that rely on continuous energy or cannot lie dormant are of little use. Moreover, if it is settled in a stack, a container has little chance of obtaining a suitable fix from GPS. In short, forget about anything related to satellite or cellular communications, or derivatives thereof. However, while in transport or settled in a stack, the container has ready access to platforms: ships, trains, or trucks that can support all communications options; therefore, they are ideal as routers for backhauling data to a central processing point."

"The value chain for container tracking is very distributed. Many different sectors derive value from tracking containers: container lessor, goods manufacturer, shipper, government/customs, insurer, buyer, inter-modal transporter, etc. all have a stake in this. The company can figure out how to develop a value-proposition that somehow delivers an incremental value (for an incremental cost) to all these

independent, but related sectors, will succeed. Container Tracking is more of a business development challenge than a technical challenge."

"Other interesting motivations for container tracking: avoidance of non-reported containers (for example, waste containers), avoidance of signature at the delivery note (a tag or GPS data can be used instead). Here, laws are missing, which enables clients to use this in lieu of a signature."

"Each country appears to have independent efforts in developing a container tracking solution. There is a need for an international coordinated effort, otherwise there will be too many incompatible systems required, thereby will increasing container shipping costs."

"A new transportation infrastructure is needed; however, it must be cost-effective."

"UHF tagging looks like the most promising technology, but worldwide standardization efforts have yet to be accomplished."

About ABI Research

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Container Security Tracking

Applications of GPS, RFID and Cellular Technologies for Supply Chain and Homeland Security

The United States Government has taken major steps to ensure the security of cargo entering its borders. Yet, there still are no legislative requirements for any type of electronic cargo seal or container tracking device. The market eagerly awaits standards, both to reduce the risks of terrorism, and, from a business standpoint, to reduce costs through supply chain management. This report examines and evaluates evolving solutions and technologies for global electronic container tracking, including: RFID, GPS, cellular, satellite, Ultra Wideband, Bluetooth, barcode, and optical character recognition. The key market drivers are identified, with a thorough examination of the relevant issues and market players for each major region.

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