

THE TRAKMY BAROMETER · 2026

The TRAKmy 2026 Asset Tracking Barometer

Where European businesses stand on asset tracking and telematics: adoption, the cost of theft, maturity by sector, technologies, return on investment, barriers and the trends shaping 2026.

×2

PLANT THEFT (2024→2025)

€45,000

AVERAGE COST OF A CONSTRUCTION THEFT

91%

RECOVERED WITHIN 48 H

01 The connected asset market

Sustained double-digit growth

02 Asset theft

A cost that is exploding, above all in construction

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Sources, benchmarks, TRAKmy

● EXECUTIVE SUMMARY

A state of play, two kinds of source

STRAIGHT ANSWER

This barometer combines **dated, sourced public data** with **benchmarks from the TRAKmy Observatory**, each clearly identified. It does not aim for decimal-point precision, but for reliable orders of magnitude against which you can situate your own organisation.

What it measures

Three angles: **adoption** (who is equipping, how much, how fast), **value** (what tracking costs and what it returns) and **maturity** (from a dot on a map to management by data).

Public data

Market studies, sector barometers, official statistics, network sunset calendars, AI research – each cited with its source and date.

Observatory benchmarks

Orders of magnitude drawn from field experience, flagged "to be validated": to be confirmed by survey and platform data before being published as hard figures.

"A credible barometer distinguishes what it knows from what it estimates."

Scope: professional asset tracking in Europe (vehicles, plant and machinery, tools, logistics assets). Where a figure comes from a single national market it is labelled accordingly. 2026 edition.

Sustained double-digit growth

STRAIGHT ANSWER

IoT asset tracking is growing at double-digit rates, driven by falling hardware costs, the maturity of low-power networks and economic pressure to sweat existing equipment harder.

~\$21bn

Global market 2025

~\$48bn

2033 projection (CAGR ~10.6%)

+45%

Deploying IoT against asset loss

The European driver

The dynamic is amplified by the **shutdown of legacy networks** across Europe. In France, Orange began switching off 2G at the end of 2025, with SFR and Bouygues following at the end of 2026; comparable sunset calendars are in force or announced in most EU markets. For hundreds of thousands of devices still running on 2G, that turns a forced replacement into an opportunity to modernise.

Which assets come first?

Equipment follows **value and risk exposure**: vehicles and powered plant first, then high-value passive assets (gensets, compressors, trailers), and finally tools and containers — by far the largest population still unconnected, and now within reach thanks to long-life NB-IoT trackers.

Sources: Global Growth Insights 2025; Fortune Business Insights; Business Research Insights; Requea (French IoT market 2025). Scopes vary between studies; the trend converges.

A cost that is exploding, above all in construction

STRAIGHT ANSWER

If there were only one reason to equip a fleet, 2025 supplied it. Theft is concentrating on high-value professional assets, against the grain of a general fall in passenger vehicle theft.

×2

Plant theft 2024→2025

€45,000

Average cost (vs €31,000 in 2024)

7 in 10

Construction firms affected

What tracking changes

Three mechanisms combine — and they reduce the number of thefts, not only their consequences:

- ✓ **Deterrence:** a tracked fleet is a less attractive target.
- ✓ **Early warning:** a geofence breach outside working hours turns a theft discovered on Monday into a theft interrupted on Saturday night.
- ✓ **Evidence:** location data speeds up the police investigation and the insurance settlement.

The insurance angle

Rising claims are pushing premiums up. Some insurers now make cover and excess conditional on a tracking device being fitted; conversely, an equipped fleet negotiates better terms. Worth quantifying with your broker — it adds to the value of the thefts you avoid.

THE KEY FIGURE

91% of vehicles fitted with a tracker are recovered within 48 hours (Coyote, 2025). Equipping an entire fleet typically costs a fraction of a single €45,000 theft.

Sources: Coyote / YouGov barometer 2026 (401 construction professionals, France); France Assureurs / Argos 2025; SSMSI / FFB. French market data — treat as an indicator of a Europe-wide trend rather than a local figure.

Four levels, from a dot on a map to data-driven management

STRAIGHT ANSWER

Maturity varies widely between sectors – but the scale is the same for everyone. Everywhere, the gap is widening between organisations that manage by data and those that merely locate.

Level	Characteristic	Dominant use
1 • Location	You know where your assets are	Search, reactive anti-theft
2 • Supervision	Alerts and geofences configured	Proactive security, compliance
3 • Optimisation	Actual utilisation measured	Cutting over-capacity, allocation
4 • Data-driven management	Enriched data, predictive models	Predictive maintenance, capex decisions

Where the sectors stand

- ✓ **Logistics / transport**: the most mature (levels 3-4).
- ✓ **Construction**: catching up fast under theft pressure (1-2 → 3).
- ✓ **Industry / energy**: progressing through predictive maintenance (4).
- ✓ **Multi-site services / SMEs**: the least equipped population, with immediate gains at level 2.

Progress one level at a time

Maturity is **cumulative**: aim for the next level up, never a two-level jump. An organisation at level 0 that tries to deploy predictive maintenance straight away will fail, for lack of a clean asset register and history. Consolidating location, then supervision, builds up the clean data that makes optimisation possible.

NB-IoT, LTE-M and the post-2G switchover

STRAIGHT ANSWER

Autonomous tracking runs on low-power cellular networks — up to ten years of battery life where a 4G SIM would last a few months. 2026 is a pivotal year for fleets still running legacy technology.

Network	Profile	Typical use	Status 2026
NB-IoT	Very low power, good indoor/rural penetration	Long-life autonomous assets	Recommended
LTE-M	Low power, better handling of mobility	Assets on the move	Recommended
4G LTE	High bandwidth, high power draw	Real-time vehicle tracking, hard-wired	Long-term
LoRaWAN	Very frugal, long range	Low-frequency sensors	Long-term (niches)
2G / 3G	Legacy	Older fleets	Being switched off

THE HIDDEN ECONOMICS OF THE 2G SUNSET

The real question is not "what does migration cost" but "what does **keeping the existing fleet running** until it fails cost". An ageing 2G fleet is a technical liability: every month adds risk (an abrupt cut-off, spare parts drying up) without creating value. Anticipating in 2026 means better terms; waiting for the switch-off means equipping under pressure, with blind assets in the meantime.

Watch point for remote and overseas regions: coverage is uneven — validate coverage over your actual operating areas before any rollout.

Four measurable levers

STRAIGHT ANSWER

The purchase price of the trackers is almost always the smallest line item. Value comes from four levers, from the most immediate to the most advanced – payback is generally counted in months, not years.

1 · Losses and thefts avoided

The easiest to quantify. With 91% recovery within 48 hours, a single theft avoided often pays for equipping an entire fleet – before counting lower insurance premiums.

2 · Cutting over-capacity

Measuring actual utilisation reveals the assets that sit idle. Reducing surplus fleet by **10 to 15%** is often the single largest saving, ahead of recovering stolen equipment.

3 · Time saved

An end to the hours spent hunting for equipment, calling sites and checking allocations. Diffuse but real – and the main driver of adoption by field teams.

4 · Predictive maintenance

The most spectacular gains: **-30 to -50%** downtime, with ROI frequently around 10:1. In France, 95% of adopters report a positive return.

Sources: Coyote 2025 (theft); predictive maintenance studies 2025-2026 (WorkTrek, IIoT World, US DoE, McKinsey). Indicative figures, to be validated against your own fleet.

Rarely the price of the hardware

STRAIGHT ANSWER

Understanding what holds organisations back is as instructive as measuring what pushes them forward. Four major barriers stand out — none of them is about hardware.

- ✓ **Integration complexity** (38% of companies): connecting to the IT estate looks like a heavy project. Answer: an open API turns integration into a connection exercise.
- ✓ **Compliance questions**: GDPR and employment law come into play as soon as employees are tracked. Answer: a project framed legally up front does not run into these blockers.
- ✓ **Distrust of the data**: earlier rollouts that proved unreliable (batteries, coverage gaps, false alerts). Answer: demand field evidence, not promises.
- ✓ **Adoption risk** (the most underestimated): a solution imposed from above gets worked around. Answer: involve the field, choose hardware a non-specialist can fit, deliver a quick benefit.

THE TAKEAWAY

These barriers are about integration, reliability, compliance and change management — in other words about the **choice of partner and method**, far more than the choice of tracker.

AI, indoor positioning, data sovereignty

STRAIGHT ANSWER

Three underlying movements converge on the same consequence: asset data is becoming a strategic asset in its own right, and its quality determines the value you can extract from it.

AI reaches the fleet

The shift from **descriptive to predictive**: anticipating a breakdown, detecting an anomaly, recommending a redeployment. It does not depend on the model (readily available) but on data quality — around 85% of AI projects fail because of the data (Gartner).

Indoor positioning (BLE)

GPS stops at the warehouse door. Bluetooth anchors place an asset by zone (bay, aisle, room). By 2026 this is an expected building block for mature fleets — the challenge is indoor/outdoor continuity in a single view.

Data sovereignty

Asset tracking generates sensitive data (routes, sites, drivers). EU hosting, no transfer outside the Union and full data portability are a rising selection criterion — and a condition of entry to some markets.

Sources: Gartner; MIT Project NANDA (July 2025); Informatica CDO Insights 2025.

What the most mature fleets do

STRAIGHT ANSWER

Advanced fleets are distinguished less by their hardware than by their method. Situate your organisation with the grid below: answering "mature" to only one or two questions signals a problem of method, not of tooling.

Question	Beginner	Mature
A unique, stable identifier per asset?	Inconsistent numbering, multiple spreadsheets	Single register, permanent identifier
Does the data feed other systems?	An isolated interface	API/MQTT feeds into CMMS, ERP, BI
Are decisions actually made on the data?	"We look when there is a problem"	Documented purchase and maintenance trade-offs
Is ROI measured?	No consolidated gains	ROI tracked per lever, reviewed regularly
Do field teams use the tool?	Worked around or ignored	Adoption measured, benefit demonstrated

*The four markers of mature fleets: start with the process (not the tool) · treat data as an asset · integrate rather than juxtapose · support the teams.
McKinsey 2025: projects that succeed are twice as likely to have rethought their processes up front.*

2026-2027: three deadlines, four recommendations

STRAIGHT ANSWER

Our recommendation fits in one sentence: treat asset data as an investment rather than a cost, and start now, on a narrow and measurable scope.

Three deadlines

- ✓ **The 2G sunset** forces modernisation (migration to NB-IoT / LTE-M).
- ✓ **Asset theft** is not receding: a structural trend, to be handled through prevention.
- ✓ **AI** will separate the prepared fleets from the rest — and the window to build the foundations is 2026.

Four recommendations

- ✓ **Start with decisions, not sensors**: instrument what serves three or four management decisions.
- ✓ **Choose a durable technology**: NB-IoT / LTE-M, with coverage verified in the field.
- ✓ **Treat data as an asset** from day one: unique identifier, complete record, IT integration.
- ✓ **Measure the return on a pilot**: one concrete lever on a sub-fleet, then scale on real numbers.

Sources, benchmarks and TRAKmy's positioning

STRAIGHT ANSWER

Deliberate transparency: this barometer separates sourced public data from TRAKmy Observatory benchmarks (to be validated by survey). Here is how our range answers the three 2026 trends.

Nature of the sources

- ✓ **Market:** specialist research firms, 2024-2025.
- ✓ **Theft:** Coyote/YouGov 2026, France Assureurs, Argos (French market).
- ✓ **Maintenance ROI:** technical studies 2025-2026.
- ✓ **AI:** Gartner, MIT, Informatica.
- ✓ **Networks:** operators' published sunset calendars.

TRAKmy's positioning

- ✓ **Clean data for AI:** asset register, sensors (ULTRA N+ 1101), analytics exports.
- ✓ **Indoor:** Bluetooth anchors (Geobeacon) for indoor/outdoor continuity.
- ✓ **Sovereignty:** data hosted in Europe (EU), hardware manufactured in Europe, European support.
- ✓ **NB-IoT range:** COMPACT (1110), ULTRA N (1141), ULTRA N+ (1101), REACT 4G (1203).

TRAKMY OBSERVATORY · TO BE VALIDATED

Before publication, replace the "to be validated" benchmarks with your own real figures (installed base, customer survey, platform data): NB-IoT share of new contracts, recovery rate and time, average observed ROI, breakdown by sector and maturity level.

TAKE THE NEXT STEP

Situate your fleet, then act

Start from the decisions you want to improve, define a measurable pilot scope and quantify the return on real data. Our experts will run a fleet study with you. Ask for a demonstration.

Request a quote