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Fleet management in Europe

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BERG INSIGHT

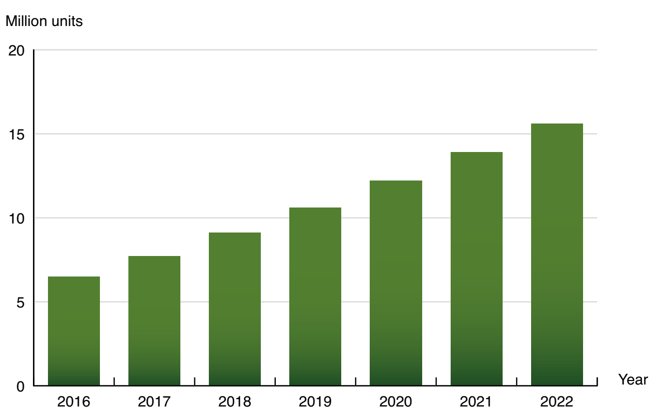
The installed base of FM systems to reach 15.6 million units by 2022

Fleet management is an ambiguous term used in reference to a wide range of solutions for different vehicle-related applications. Berg Insight's definition of a fleet management solution is a vehicle-based system that incorporates data logging, satellite positioning and data communications to a backoffice application. The history of fleet management solutions goes back several decades. On-board vehicle computers first emerged in the 1980s and were soon connected to various networks. Today mobile networks can provide ubiquitous online connectivity at a reasonable cost and mobile computing technology delivers very high performance, as well as excellent usability. All of these components combined enable the delivery of vehicle management, transport management, driver management and mobile workforce management applications linking vehicles and enterprise IT systems.

Commercial vehicle fleets play an essential role in the European economy. According to official statistics there were 37.8 million commercial vehicles in use in EU23+2 in 2015. The 6.1 million medium and heavy trucks accounted for more than 75 percent of all inland transports, forming a € 250 billion industry. Approximately 0.8 million buses and coaches stood for 9.3 percent of all passenger kilometres. The greater part of the 30.9 million light commercial vehicles (LCV) in Europe was used by mobile workers and for activities such as distribution of goods and parcels. Last but not least, there are an estimated 21.0 million passenger cars owned by companies and governments.

Berg Insight is of the opinion that the European fleet management market has entered a growth period that will last for several years to come. Individual markets may however suffer temporary setbacks, depending on the local economic developments. The number of fleet management systems in active use is forecasted to grow at a compound annual growth rate of 15.2 percent from 7.7 million units at the end of 2017 to 15.6 million by 2022. The penetration rate in the total population of non-privately owned commercial vehicles and cars is estimated to increase from 15.0 percent in 2017 to 28.8 percent in 2022.

A group of international aftermarket solution providers have emerged as the leaders on the European fleet management market. Berg Insight ranks TomTom Telematics as the largest vendor in Europe at the end of 2017 with 708,000 subscribers in the region. Transics is ranked as the largest player in the aftermarket heavy trucks segment with an estimated 121,000 active units installed. Other significant players include European companies such as Masternaut, Microlise, ABAX, Viasat, Bornemann, Trakm8, Quartix, OCEAN (Orange), GSGroup, Targa Telematics and Vehco and international players like Verizon Connect, Trimble and Teletrac Navman from the US, Fleet Complete from Canada, Astrata Europe from Singapore and the South African telematics providers Ctrack (Inseego) and MiX Telematics.



Installed base of active fleet management units (EU27+2 2016–2022)

All major truck manufacturers on the European market offer OEM telematics solutions as a part of their product portfolio. Mercedes-Benz, Volvo and Scania launched their first products in the 1990s followed by MAN in 2000, Renault Trucks in 2004, DAF Trucks in 2006 and Iveco in 2008. A major trend in the past years has been the announcements of standard line fitment of fleet management solutions. Since the end of 2011, Scania is rolling out the Scania Communicator as standard on all European markets and includes a ten-year basic service subscription. The new generation of the Actros trucks from Mercedes-Benz contains the FleetBoard vehicle computer as standard in all EU28 countries. Volvo offers Dynafleet as standard in Europe. New MAN trucks are now equipped with RIO as standard replacing MAN TeleMatics. DAF launched its new optional DAF Connect that has been developed in-house in September 2016. The leading OEMs in Europe are Scania, Volvo and Daimler with 219,000, 117,000 and 108,000 active FM subscribers respectively at the end of 2017.

The consolidation trend continues and 13 M&A activities have taken place in the past year. In October 2017, Blue Tree Systems was acquired by ORBCOMM. ABAX acquired Danish Fleetfinder in December 2017. In January 2018, EcoFleet was acquired by Fleet Complete and Verizon Connect moreover continued its European expansion with the acquisition of Movildata in Spain. Vehco was acquired by AddSecure in May 2018, which gave Vehco the structure and financial strength to further expand within fleet management. Vehco's third acquisition followed shortly thereafter when the company took over the ownership of Groeneveld ICT Solutions. The latest transaction was done in October 2017 when Viasat acquired Portuguese TrackIT Consulting after recently having picked up also Locster in France and Detector in Spain.

This report answers the following questions:

- What are the key drivers behind the adoption of FMS in Europe?
- What is the geographical and ownership structure of commercial vehicle fleets in Europe?
- Who are the leading international and regional providers of aftermarket fleet management solutions in Europe?
- What offerings are available from truck, trailer and construction equipment OEMs?
- What impact will the launch of standard factory installed FM systems from the OEMs have on the market?
- What are the FMS vendors' hardware strategies and thoughts on BYOD?
- Will the FM industry consolidate further during 2018–2019?
- How will the commercial vehicle telematics industry evolve in the future?

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About the Author

Johan Fagerberg is co-founder and an experienced analyst with a Masters degree in Electrical Engineering from Chalmers University of Technology. His areas of expertise include location-based services and wireless M2M/IoT markets, with a special focus on fleet management and car telematics.

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