

Fleet Management in Australia and New Zealand

Fleet Management in Australia and New Zealand is the second consecutive report from Berg Insight analysing the latest developments on the fleet management market in this region.

This strategic research report from Berg Insight provides you with 100 pages of unique business intelligence including 5-year industry forecasts and expert commentary on which to base your business decisions.

Highlights from this report:

- ◆ **Insights** from numerous interviews with market-leading companies.
- ◆ **New data** on vehicle populations and commercial fleets in Australia and New Zealand.
- ◆ **Comprehensive overview** of the fleet management value chain and key applications.
- ◆ **In-depth analysis** of market trends and key developments.
- ◆ **Updated profiles** of 29 aftermarket fleet management solution providers.
- ◆ **Summary** of OEM propositions from commercial vehicle brands.
- ◆ **Market forecasts** lasting until 2021.

The installed base of FM systems in Australia & New Zealand will reach 1.4 million units by 2021

Berg Insight is of the opinion that the market for fleet management (FM) in Australia and New Zealand is in a growth period which will continue in the years to come. The number of FM systems in active use is forecasted to grow at a compound annual growth rate (CAGR) of 15.7 percent from almost 0.7 million units in 2016 to 1.4 million by 2021. The penetration rate in the total population of non-privately owned fleet vehicles used by businesses is at the same time estimated to increase from 14.8 percent in 2016 to 27.8 percent in 2021. The fleet management market in the region is today influenced positively by a number of different market drivers including regulatory developments such as health and safety regulations, road user charges and electronic work diaries.

A large number of diverse vendors are active on the FM market in Australia and New Zealand, including several of the leading international players as well as a plethora of small and medium-sized companies mainly focused on this region. Berg Insight ranks Teletrac Navman as the largest provider in Australia and New Zealand, having surpassed the milestone of 100,000 active units in the region in 2017. Verizon is now estimated to be the second largest player following the 2016 acquisitions of Telogis and

Fleetmatics. The second runner-up is New Zealand-based EROAD which has more than 40,000 FM units in the region. South Africa-based Altech Netstar has also reached this level following the acquisitions of Pinpoint Communications and Ezy2c in 2015–2017. Other notable providers with estimated installed bases of 15,000–40,000 active units in Australia and New Zealand include the local suppliers IntelliTrac, MTDData, Smartrak, Coretex, Procon Telematics, Myionu and GPSEngine as well as international players including Fleet Complete (acquired Geotab's former reseller Securatrak in 2016), MiX Telematics and Ctrack. Top-ranking FM providers on the global market such as TomTom Telematics, Gurtam and Trimble have also expanded to this region. Additional examples of local players include Digital Matter and Directed Electronics Australia. The latter works with a range of vehicle OEMs on the local market. Commercial vehicle OEMs which have introduced fleet telematics solutions in the region independently or through partnerships include Isuzu, Volvo Trucks, UD Trucks, Scania, PACCAR, Toyota, Hino and Mercedes-Benz.

Berg Insight's M2M Research Series

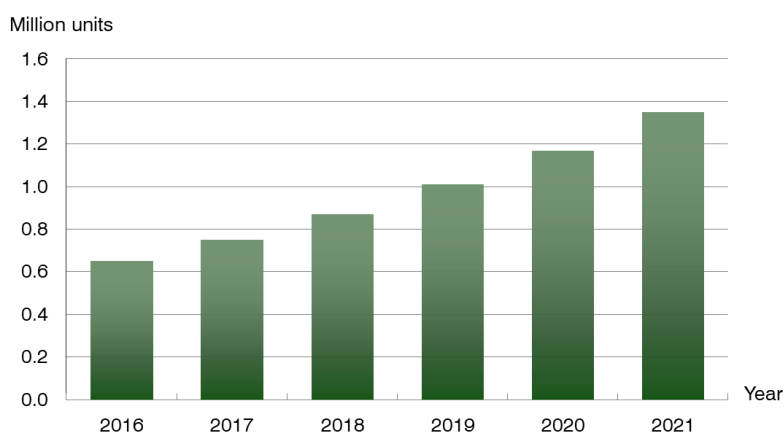
What are the key business opportunities in the emerging wireless M2M/IoT market? Berg Insight's M2M Research Series is a unique series of 25 market reports published on a regular basis. Each title offers detailed analysis of a specific vertical application area such as smart metering, fleet management or vehicle telematics. Once per year we also publish summaries of our research with detailed forecasts for the Global and European wireless M2M markets, respectively.

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This report answers the following questions:

- ◆ How does the fleet management market in Australia and New Zealand compare with other markets?
- ◆ What is the price level of fleet telematics solutions in the region?
- ◆ Which are the leading local providers of aftermarket fleet management solutions?
- ◆ Which international fleet management providers are targeting Australia and New Zealand?
- ◆ What hurdles are there for foreign players?
- ◆ What offerings are available from commercial vehicle OEMs?
- ◆ Will the FM industry consolidate further during 2017–2018?
- ◆ How will the commercial vehicle telematics industry evolve in the future?



Installed base of active fleet management units (Australia & New Zealand 2016–2021)

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Who should buy this report?

Fleet Management in Australia and New Zealand is the foremost source of information about the commercial vehicle telematics and fleet management market in this region. Whether you are a telematics vendor, vehicle manufacturer, telecom operator, investor, consultant, or government agency, you will gain valuable insights from our in-depth research.

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Table of Contents Fleet Management in Australia and New Zealand

<p>1 Fleet management solutions</p> <p>1.1 Fleet management infrastructure</p> <p>1.1.1 Vehicle segment</p> <p>1.1.2 GNSS segment</p> <p>1.1.3 Network segment</p> <p>1.1.4 Backoffice segment</p> <p>1.2 Vehicle segment</p> <p>1.2.1 Vehicle diagnostics and maintenance planning</p> <p>1.2.2 Security tracking</p> <p>1.3 Driver management</p> <p>1.3.1 Driving data registration and analysis</p> <p>1.3.2 Video-based driver monitoring</p> <p>1.3.3 Eco-driving schemes</p> <p>1.3.4 Insurance risk management</p> <p>1.4 Operations management</p> <p>1.4.1 Routing and navigation</p> <p>1.4.2 Transport management</p> <p>1.4.3 Mobile workforce management</p> <p>1.5 Regulatory compliance and reporting</p> <p>1.5.1 Fatigue management and Electronic Work Diaries (EWD)</p> <p>1.5.2 Intelligent Access Program (IAP) and Intelligent Speed Compliance (ISC)</p> <p>1.5.3 Road User Charges (RUC)</p> <p>1.5.4 Health and safety regulations</p> <p>1.5.5 Other applications</p> <p>1.6 Business models</p>	<p>2 Market forecasts and trends</p> <p>2.1 Market analysis</p> <p>2.1.1 Commercial vehicle fleets in Australia and New Zealand</p> <p>2.1.2 Fleet management installed base and unit shipments</p> <p>2.1.3 Fleet management vendor market shares</p> <p>2.1.4 Local market characteristics in Australia and New Zealand</p> <p>2.2 Market drivers and barriers</p> <p>2.2.1 Macroeconomic environment</p> <p>2.2.2 Regulatory environment</p> <p>2.2.3 Competitive environment</p> <p>2.2.4 Technology environment</p> <p>2.3 Value chain analysis</p> <p>2.3.1 Telematics industry players</p> <p>2.3.2 Automotive industry players</p> <p>2.3.3 Telecom industry players</p> <p>2.3.4 IT industry players</p> <p>2.4 Future industry trends</p> <p>3 Company profiles</p> <p>3.1 International aftermarket solution providers</p> <p>3.1.1 Ctrack</p> <p>3.1.2 Fleet Complete</p> <p>3.1.3 Fleetmatics (Verizon)</p>	<p>3.1.4 Garmin and partners</p> <p>3.1.5 Geotab</p> <p>3.1.6 MiX Telematics</p> <p>3.1.7 Teletrac Navman</p> <p>3.1.8 Telogis (Verizon)</p> <p>3.1.9 TomTom Telematics</p> <p>3.2 Local aftermarket solution providers</p> <p>3.2.1 BIGmate</p> <p>3.2.2 BlackBox Control</p> <p>3.2.3 Blackhawk Tracking Systems</p> <p>3.2.4 Coretex</p> <p>3.2.5 Digital Matter</p> <p>3.2.6 Directed Electronics Australia</p> <p>3.2.7 EROAD</p> <p>3.2.8 Ezy2c (Altech Netstar)</p> <p>3.2.9 Future Fleet</p> <p>3.2.10 GPSengine</p> <p>3.2.11 IntelliTrac</p> <p>3.2.12 MTData</p> <p>3.2.13 MyFleet</p> <p>3.2.14 Myionu</p> <p>3.2.15 Netcorp GPS</p> <p>3.2.16 Pinpoint Communications (Altech Netstar)</p> <p>3.2.17 Procon Telematics</p> <p>3.2.18 Smartrak (Constellation Software)</p> <p>3.2.19 TrackIt</p> <p>3.2.20 TurboTrack</p> <p>Glossary</p>
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