

Fleet Management in Australia and New Zealand

Fleet Management in Australia and New Zealand is the third 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 130 pages of unique business intelligence including 5-year industry forecasts and expert commentary on which to base your business decisions.

Highlights from the third edition of the report:

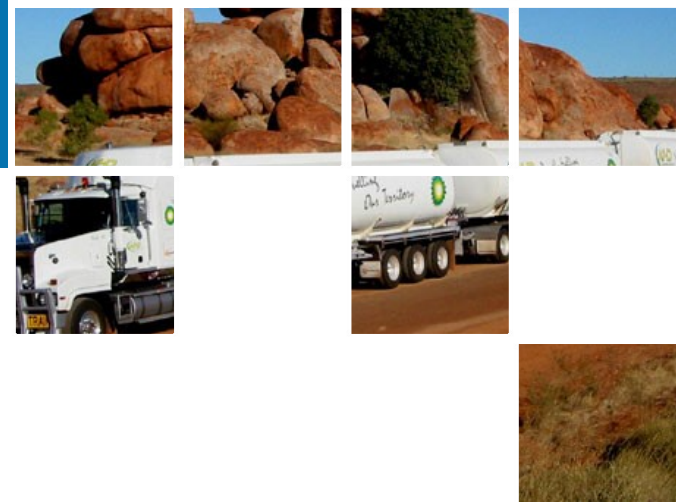
- ◆ **Insights** from numerous interviews with market-leading companies.
- ◆ **New data** on vehicle populations and commercial fleets in Australia and New Zealand.
- ◆ **Comprehensive overview** of the fleet management value chain and key applications.
- ◆ **In-depth analysis** of market trends and key developments.
- ◆ **Updated profiles** of 30 aftermarket fleet management solution providers.
- ◆ **Summary** of OEM propositions from commercial vehicle brands.
- ◆ **Market forecasts** lasting until 2022.

The installed base of FM systems in Australia & New Zealand will reach 1.7 million units by 2022

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 16.4 percent from almost 0.8 million units in 2017 to nearly 1.7 million by 2022. 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 16.9 percent in 2017 to 32.7 percent in 2022. The fleet telematics market in the region is today influenced positively by a number of different drivers including regulatory developments related to health and safety regulations, chain of responsibility legislation and road user charges.

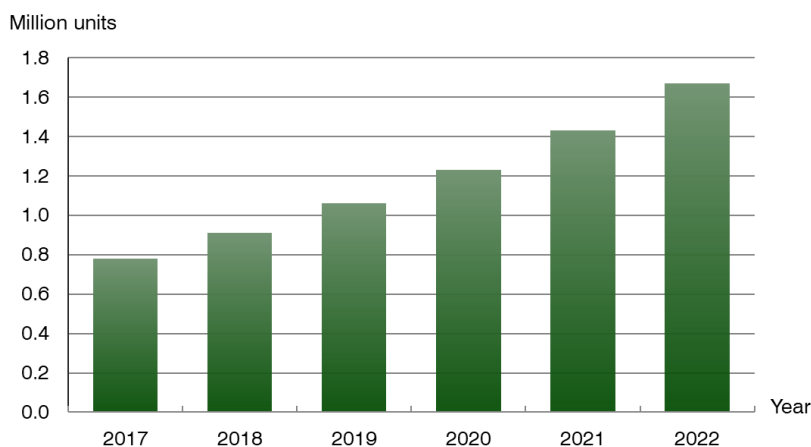
A large number of diverse vendors are active on the FM market in Australia and New Zealand, including several of the leading international players as well as a plethora of small and medium-sized companies mainly focused on this region. Berg Insight ranks Teletrac Navman as the largest provider in Australia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

Australia respectively. MTDData is owned by the operator Telstra since 2017. The fifth largest player is South Africa-based Netstar which has reached over 40,000 units in the region following the acquisitions of Pinpoint Communications and Ezy2c. Other notable vendors with estimated installed bases of more than 20,000 active units in Australia and New Zealand include the local suppliers IntelliTrac, Smartrak, Coretex and Digital Matter, as well as international players including MiX Telematics and Fleet Complete. The latter entered the region through the acquisition of Geotab's reseller Securatrak. Top-ranking FM providers on the global market such as TomTom Telematics, Trimble and Gurtam have also expanded to this region. Additional examples of local players with comparably sizeable subscriber bases include Myionu, GPSEngine, Procon Telematics 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, Mercedes-Benz and Mitsubishi.



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 2019–2020?
- ◆ How will the commercial vehicle telematics industry evolve in the future?



Installed base of active fleet management units (Australia & New Zealand 2017–2022)

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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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