Fleet Management – World 2014/2015

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Fleet management (FM) 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 communication to a backoffice application. The history of fleet management solutions goes back several decades. On-board vehicle computers first emerged in the 1990s and were soon connected to various satellite and terrestrial wireless networks. Today, mobile networks can provide ubiquitous online connectivity in many regions 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 economy in the CIS and Eastern Europe, where several countries are part of important Pan-European transport corridors. The total of around 10 million HCVs in the region account for a major share of the inland transports. Motor vehicles are for example involved in about 70 percent of all inland transports in Russia. In Europe, medium and heavy trucks account for over 75 percent of all inland transports, forming a €250 billion industry. Moreover, the greater part of the total 14 million LCVs in Eastern Europe and the CIS are used by mobile workers and for activities such as distribution of goods and parcels.

Berg Insight is of the opinion that the fleet management market in the CIS and Eastern Europe has entered a growth period that will last for several years to come. Key drivers include cost reductions related to fuel savings and regulatory developments such as ERA-GLONASS and the Russian tachograph mandate. The number of fleet management systems in active use in the region is forecasted to grow at a compound annual growth rate of 15.7 percent from 2.9 million units at the end of 2013 to 5.9 million by 2018. The penetration rate in the total population of non-privately owned commercial vehicles is estimated to increase from 12.1 percent in 2013 to 21.7 percent in 2018. The Russian market accounts for a significant share of the region’s total installed base and is forecasted to grow from 1.3 million active FM units at the end of 2013 to 2.6 million by 2018. The leading FM providers in terms of installed base in the CIS and Eastern Europe include diverse players from a number of countries. Belarus-based Gurtam is the leading FM software provider active in most countries in the region and it has more than 300,000 commercial vehicles under management. The Russian incumbents ENDS and NIS group which includes M2M Telematics are the first runner-ups. Arvento Mobile Systems from Turkey and TechnoKom from Russia which are both estimated to have surpassed 100,000 active FM units are moreover important telematics players on their respective domestic markets, with presence also in other countries in both the CIS and Eastern Europe. Additional significant players include SCOUT, Mobiliz, Omnicomm and Fort-Telecom. The Russian newcomer SpaceTeam has also established a strong position after one year on the market. The Russian FM vendor landscape has seen some significant shifts in recent time. Both M2M Telematics and Russian Navigation Technologies have lost many employees and the latter even filed for bankruptcy in 2014. Interestingly, none of the major international solution providers have so far managed to capture any significant market shares in this region.

The fleet management markets in Eastern Europe and the CIS are expected to converge with the developments in Western Europe. Eastern Europe is already tracing the most developed European markets closely in terms of FM system functionality and service models. The major Russian providers are instead still primarily serving large corporations with standalone systems, whereas subscription services up to this point mainly have been adopted by SMBs. Cloud services based on recurring service fees have however in recent years started to become a greater focus also for major Russian enterprise fleets and their domestic FM solution providers. Another key trend on the European market is factory-fitment of OEM truck telematics. The local Russian truck manufacturers have however not yet fully embraced this development and the OEM telematics activities remain comparably limited. Ultimately, the OEMs in the CIS are also expected to gradually introduce proprietary telematics systems including vehicle tracking, remote diagnostics and other fleet management functionality. Legal mandates and the increasing competition from Western European commercial vehicle OEMs will propel this development.
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The consolidation trend continues in the fleet management market

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 communication 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 satellite and terrestrial wireless 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 36.1 million commercial vehicles in use in EU27+2 in 2011. The 5.9 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. Last but not least, the greater part of the 29.5 million light commercial vehicles (LCV) in Europe was used by mobile workers and for activities such as distribution of goods and parcels.

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 14.2 percent from 3.65 million units at the end of 2013 to 7.10 million by 2018. The penetration rate in the total population of non-privately owned commercial vehicles is estimated to increase from 12.4 percent in 2013 to 22.9 percent in 2018.

A group of international aftermarket solution providers have emerged as the leaders on the European fleet management market. Masternaut reported an active installed base of close to 350,000 units in July 2014, mainly in France and the UK. TomTom Telematics was the fastest growing vendor also in 2014 and has now surpassed

400,000 subscribers in August 2014. This means that the two companies today share the number one spot in terms of installed base in Europe. Transics is ranked as the largest player in the heavy trucks segment with an estimated 85,000 active units installed. Other significant players include European companies such as Trakm8, Quartix, TRACKER, Vehco and Microlise and international players like Trimble, Navman Wireless and Teledtrac from the US; Astra Europe from Singapore and the South African telematics providers DigiCore and MiX Telematics.

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 and 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 four year basic service subscription. The new generation of the Actros trucks from Mercedes-Benz contains the FleetBoard vehicle computer as standard in all EU27 countries since October 2011. Volvo is going in the same direction offering Dynafleet as standard in Europe. MAN TeleMatics is since July 2012 standard on the new truck model TGX EfficientLine including a 4-month trial for the service.

A second wave of M&A activities continued into 2014. At the beginning of 2014, Qualcomm finally divested also the majority of the European arm of its fleet business to Astrata Group. Later in February, WABCO acquired Transics and the transaction valued the company at about € 100 million. Lysanda acquired UK-based TRACKER Network in February. In April, TomTom also acquired the French FM provider DAMS Tracking, adding another 27,000 subscriptions to its installed base. Francisco Partners moreover divested Masternaut to Summit Partners (majority ownership) and FleetCor in the same month. In July 2014, Zucchetti Group acquired a majority share (51 percent) of Macnil from its founders. The latest transaction was done in October 2014 when Finder acquired its Polish competitor Autoguard to form the largest FMS provider in Poland.

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?
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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 markets, with a special focus on fleet management and car telematics.

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- **Revised** market forecasts lasting until 2018.
How will the fleet management market develop in the Americas?

Fleet management (FM) 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 communication 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 satellite and terrestrial wireless networks. Today, mobile networks can provide ubiquitous online connectivity in many regions 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 economy both in North and Latin America. In North America, there are approximately 13.3 million GVW 3–8 commercial vehicles in use. Around 18 million lighter vehicles including GVW 1–2 vehicles and cars with no GVW are also owned by enterprises or public entities. In Latin America, the number of commercial vehicles in operation is estimated to 24.3 million, out of which 5.5 million are heavy trucks and 18.8 million are light commercial vehicles. Berg Insight is of the opinion that the market for fleet management in the Americas is in a growth period which will continue in the years to come. The advanced North American market will remain on a growth track, not the least driven by regulatory developments such as CSA and the forthcoming ELD/EOBR mandate. Latin America has traditionally presented a very different scenario, often requiring an educational process in order to extend the perception of fleet management beyond security-related aspects. The Latin American fleet owners have however also started to embrace functionality for optimisation of fleet operations to an increasing extent.

Berg Insight expects the FM market to continue to show healthy growth in 2014–2018. In North America, the number of systems in active use is forecasted to grow at a compound annual growth rate (CAGR) of 15.3 percent from 4.0 million units in 2013 to 8.1 million units by 2018. The penetration rate in the total population of non-privately owned commercial vehicles is estimated to increase from 13.9 percent in 2013 to 25.7 percent in 2018. In Latin America, the number of systems in use is projected to increase from 1.9 million units in 2013, growing at a CAGR of 16.1 percent to reach 3.9 million units in 2018. The penetration rate in the region is estimated to increase from 8.0 percent in 2013 to 15.3 percent in 2018.

The leading FM providers in the Americas include a range of different actors. Fleetmatics is ranked as the largest player with an estimated installed base of 400,000 active units mainly in North America. Key market segments include field service and local delivery. Trimble holds the second place and has reached a total installed base of over 350,000 active units in North America following the acquisition of PeopleNet. Trimble now has a strong presence in both field service management and transportation & logistics. Key competitors in the heavy truck segment include Omnitrac which has acquired XRS in 2014. Zonar Systems is also a strong player in this field. Other actors focusing on service fleets include Verizon Networkfleet and NexTraq. Several players also have a broader market scope, covering both light and heavy vehicles. Examples include Telogis, Teletrac, Geotab, Webtech Wireless and CalAmp. Major Brazilian providers include Sascar, Autotrac, Zatix and OnixSat, each having estimated installed bases in the range of 70,000–190,000 units. Other notable actors in Latin America include Copiloto Satelital, Global Track, Grupo UDA bases in the range of 70,000–190,000 units. Other notable actors in Latin America include Copiloto Satelital, Global Track, Grupo UDA, Sascar, Autotrac, Zatix and OnixSat, each having estimated installed bases in the range of 70,000–190,000 units. Other notable actors in Latin America include Copiloto Satelital, Global Track, Grupo UDA, Sascar, Autotrac, Zatix and OnixSat, each having estimated installed bases in the range of 70,000–190,000 units. Other notable actors in Latin America include Copiloto Satelital, Global Track, Grupo UDA, Sascar, Autotrac, Zatix and OnixSat, each having estimated installed bases in the range of 70,000–190,000 units. Other notable actors in Latin America include Copiloto Satelital, Global Track, Grupo UDA, Sascar, Autotrac, Zatix and OnixSat, each having estimated installed bases in the range of 70,000–190,000 units. Other notable actors in Latin America include Copiloto Satelital, Global Track, Grupo UDA, Sascar, Autotrac, Zatix and OnixSat, each having estimated installed bases in the range of 70,000–190,000 units. Other notable actors in Latin America include Copiloto Satelital, Global Track, Grupo UDA, Sascar, Autotrac, Zatix and OnixSat, each having estimated installed bases in the range of 70,000–190,000 units. Other notable actors in Latin America include Copiloto Satelital, Global Track, Grupo UDA, Sascar, Autotrac, Zatix and OnixSat, each having estimated installed bases in the range of 70,000–190,000 units. Other notable actors in Latin America include Copiloto Satelital, Global Track, Grupo UDA, Sascar, Autotrac, Zatix and OnixSat, each having estimated installed bases in the range of 70,000–190,000 units. Other notable actors in Latin America include Copiloto Satelital, Global Track, Grupo UDA, Sascar, Autotrac, Zatix and OnixSat, each having estimated installed bases in the range of 70,000–190,000 units. Other notable actors in Latin America include Copiloto Satelital, Global Track, Grupo UDA, Sascar, Autotrac, Zatix and OnixSat, each having estimated installed bases in the range of 70,000–190,000 units. Other notable actors in Latin America include Copiloto Satelital, Global Track, Grupo UDA, Sascar, Autotrac, Zatix and OnixSat, each having estimated installed bases in the range of 70,000–190,000 units. Other notable actors in Latin America include Copiloto Satelital, Global Track, Grupo UDA, Sascar, Autotrac, Zatix and OnixSat, each having estimated installed bases in the range of 70,000–190,000 units. Other notable actors in Latin America include Copiloto Satelital, Global Track, Grupo UDA, Sascar, Autotrac, Zatix and OnixSat, each having estimated installed bases in the range of 70,000–190,000 units. Other notable actors in Latin America include Copiloto Satelital, Global Track, Grupo UDA, Sascar, Autotrac, Zatix and OnixSat, each having estimated installed bases in the range of 70,000–190,000 units. Other notable actors in Latin America include Copiloto Satelital, Global Track, Grupo UDA, Sascar, Autotrac, Zatix and OnixSat, each having estimated installed bases in the range of 70,000–190,000 units. Other notable actors in Latin America include Copiloto Satelital, Global Track, Grupo UDA

 Most commercial vehicle manufacturers active in the Americas today offer OEM telematics. Examples in North America include Daimler’s Virtual Technician, Volvo Link, Ford Connect, Hino Insight and GM’s recent OnStar initiative for fleets. OEM systems offered in Latin America moreover include Daimler’s FleetBoard, Volvo’s Dynafleet, Scania Fleet Management, Iveco’s Frotas, Ford’s Fordtrac and Volksnet from MAN Latin America. The OEM-provided systems are either developed in-house or powered by telematics partners. A trend among the OEMs is to increasingly rely on aftermarket solution partners and additional collaborations are expected in 2015. The comparably low adoption of OEM systems in the Americas so far has now started to take off and strong growth is anticipated in this segment.

This report answers the following questions:

- Will the FM industry consolidate further during 2014–2015?
- What is the geographical structure of commercial vehicle fleets in the Americas?
- Who are the leading international and regional providers of aftermarket fleet management solutions in the Americas?
- What offerings are available from commercial vehicle OEMs?
- How is the shift towards standard hardware affecting the market for fleet management solutions in the Americas?
- How are the regulatory developments in the Americas affecting the fleet management industry?
- What differences are there between the North and Latin American markets?
- How will the commercial vehicle telematics industry evolve in the future?
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Fleet Management in China is a comprehensive report from Berg Insight analysing the latest developments on the fleet management market in China.

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- **Insights** from 76 new executive interviews with market leading companies.
- **New data** on vehicle populations and commercial fleets in China.
- **Comprehensive overview** of the fleet management value chain and key applications.
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- **Updated profiles** of 39 aftermarket fleet management solution providers.
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FMS market boosted by government initiatives and booming e-commerce market

Fleet management (FM) 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 communication 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 satellite and terrestrial wireless networks. Today, mobile networks can provide ubiquitous online connectivity in many regions 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 Chinese economy and are crucial for the development of the country. Road transport represents around 75 percent of the total goods transports on the Chinese market measured by weight, corresponding to almost 31 billion tonnes in 2013. The total ownership of trucks in China reached almost 17.9 million vehicles in 2011 according to official statistics. Around 2.5 million buses are moreover estimated to be in operation in the country.

Berg Insight is of the opinion that the Chinese fleet management market will experience steep growth in the next coming years. The development is boosted by a combination of political decisions to track selected trucks and buses and the explosion of e-commerce which forces logistics companies to improve the fleet management efficiency and customer service by enabling tracking of goods status information. National, provincial and regional initiatives to reduce pollution in the transport sector are moreover expected to speed up the renewal of the operating fleet of trucks and buses. This development along with increasing factory-fitting of telematics platforms together foster increased FM adoption on the Chinese market. The number of fleet management systems in active use is forecasted to grow at a compound annual growth rate of 22.9 percent from 2.1 million units at the end of 2014 to 5.9 million by 2019. The penetration rate in the total population of registered commercial vehicles including trucks and buses is estimated to increase from 9.0 percent in 2014 to reach 19.8 percent in 2019. Track & trace systems dominate the market and the installed base so far includes a notable share of low-end systems with comparatively limited functionality.

The Chinese fleet management market includes numerous players that have installed tens of thousands of telematics systems for fleet clients. Top providers with installed bases of more than 100,000 units include E6GPS and Etrans. There are furthermore a number of players with installed bases in the range of around 50,000–100,000 units, including Beijing Zhongdou Technology (Ccompact), Shenzhen Huobao Electronics Technology, Shenzhen Weitongda Electronics and 666GPS. Other players with installed bases of approximately 50,000 units include Zhengzhou Shenyang Science & Technology, Shenzhen SOFAR Communication, Shanghai Transun Telematics Technology, Sinocastel, Baoding Beier Electronics and Aerospace Intelligent. Also a small number of international aftermarket solution providers have entered the Chinese fleet management market but the installed bases of the foreign providers remain limited. Among the few international providers that have entered this market and achieved installed bases of at least 1,000 units are Trimble, MIX Telematics, Microlise and Navman Wireless.

Some Chinese commercial vehicle OEMs have introduced telematics systems. In the truck segment, a small number of OEMs stand out as more prominent in terms of fleet telematics activities – most notably Foton and Shaanxi Automobile Group. There are further a number of telematics initiatives among the bus manufacturers from players such as Yutong and King Long Group. The latter is also known as the Three Dragons and includes the brands King Long, Golden Dragon and Higer. Multiple telematics offerings have been launched within the group. Also a number of other truck and bus manufacturers are exploring opportunities related to fleet telematics, but many OEMs still have little or no activity in this space. The automotive industry players on the Chinese market are in the future expected to increasingly equip new commercial vehicles with telematics systems in line with government initiatives.

This report answers the following questions:

- How does the fleet management market in China compare with Western markets?
- What is the ownership structure of commercial vehicle fleets in China?
- What is the price level of Chinese fleet telematics solutions?
- Which are the leading domestic providers of aftermarket fleet management solutions?
- What offerings are available from commercial vehicle OEMs?
- How are the international fleet management providers approaching the Chinese market?
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