



The Carsharing Telematics Market

5th edition

The Carsharing Telematics Market is the fifth strategy report from Berg Insight analysing the latest developments on this market worldwide including a comprehensive overview of the carsharing telematics value chain covering 34 carsharing platform vendors and 67 carsharing initiatives from specialist CSOs and car OEMs. This strategic research report provides you with 155 pages of unique business intelligence including 5-year industry forecasts and expert commentary on which to base your business decisions.

The public carsharing fleet reached 539,000 vehicles worldwide in 2021

Passenger cars and light trucks are the main modes of transportation in most industrialised countries. The vast majority of car trips in metropolitan areas are drive-alone trips with only one person in the car and vehicles are used for only about one hour per day on average. Carsharing is one of many car-based mobility services that have become available for people that want to complement other modes of transportation with car-based mobility occasionally. Examples of other car-based mobility services include traditional car rental, carpooling, ridesharing, taxi and ridesourcing services. Many of these mobility services aim to decrease the cost of car-based transportation, create convenience through fewer ownership responsibilities, as well as reduce congestion and environmental impact.

Carsharing is a decentralised car rental service focusing on short term rentals that supplements other modes of transport including walking, cycling and public transport. Carsharing aims to provide an alternative to individual car ownership without restricting individual mobility by providing affordable access to cars. CarSharing Organisations (CSOs) offer members access to a fleet of shared cars from unattended self-service locations. Today, most CSOs use station-based networks with roundtrip rental. This operational model requires members to return a vehicle to the same designated station from which it was accessed. Some CSOs have also started to offer one-way carsharing that enables users to return the car to any station operated by the CSO. Another model that is rapidly gaining in popularity is free floating carsharing, which enables members to pick up and drop off cars anywhere within a designated area. The ability to access available cars instantly without prior booking and no need to schedule return time make this type of service attractive for short trips.

Telematics systems and smartphones are key enablers of carsharing services. In-car hardware technologies for carsharing services comprise an on-board computer, telematics device and RFID reader for capturing trip data, enable fleet management and grant access to the car through an RFID smartcard or smartphone app. An in-vehicle user terminal with keypad and display may also be installed to provide the driver with visible messages and guidance, as well as allow management of reservations from within the vehicle. Software platforms include complete IT systems that can support all the operational activities of a CSO ranging from management of in-vehicle equipment, fleet management, booking management, billing, as well as operations supervision via dashboards and data analytics. Leading vendors of hardware and software platforms include INVERS, Convadis, Continental, Octo Telematics, Vulog, Mobility Tech Green, Targa Telematics and Glide.io. Several carsharing technology vendors also target the emerging

corporate carsharing market that aims to increase corporate car pool availability and reduce mobility costs.

Commercial carsharing services are offered by specialist carsharing companies, car rental companies, carmakers, as well as public transport operators. Examples of leading CSOs backed by carmakers include SHARE NOW (owned by Stellantis since 2022), Free2Move (owned by Stellantis), Wible (owned by Kia) and KINTO Share (owned by Toyota). Car rental CSOs include Ubeeqo (owned by Europcar Mobility Group), Sixt Share (owned by Sixt) as well as Zipcar (owned by Avis Budget Group). Examples of specialised CSOs include Times Car Plus (owned by the Japanese parking lot operator Park 24), Socar in South Korea, EvCard and Liandong Cloud in China, Enjoy (owned by the Italian energy company Eni), Mobility Carsharing in Switzerland, Stadtmobil, Miles and Cambio in Germany, Citiz in France, Communauto in Canada and GoGet in Australia.

The carsharing market is currently in a phase of growth which is expected to continue in the coming years. The covid-19 pandemic was only temporarily affecting the market which has recovered in full speed in the last two years. Berg Insight estimates that the total number of carsharing members worldwide reached 86.0 million at the end of 2021. At the same time, the total carsharing fleet had reached about 539,000 vehicles. Berg Insight forecasts that carsharing membership will grow to about 224.3 million globally by the end of 2026 and the total carsharing fleet will then reach approximately 973,000 cars. The corporate carsharing telematics market is moreover estimated to 82,000 vehicles at year-end 2021 and is forecasted to reach about 148,000 vehicles in 2026. Europe, North America and Asia-Pacific represent the vast majority of all carsharing programmes and active members from an international perspective. The front-running markets include Russia, Germany, Italy, France, South Korea, China and Japan.

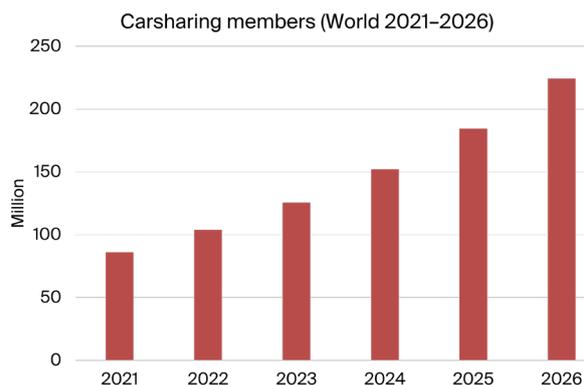


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Glossary

Highlights from the report

- Insights from 30 executive interviews with market leading companies.
- New data on carsharing fleets and members worldwide.
- Comprehensive overview of the carsharing telematics value chain.
- In-depth analysis of market trends and key developments.
- Detailed profiles of 34 carsharing platform vendors and their propositions.
- Case studies of 67 carsharing initiatives from specialist CSOs, car rental companies and car OEMs.
- Market forecasts by region lasting until 2026.

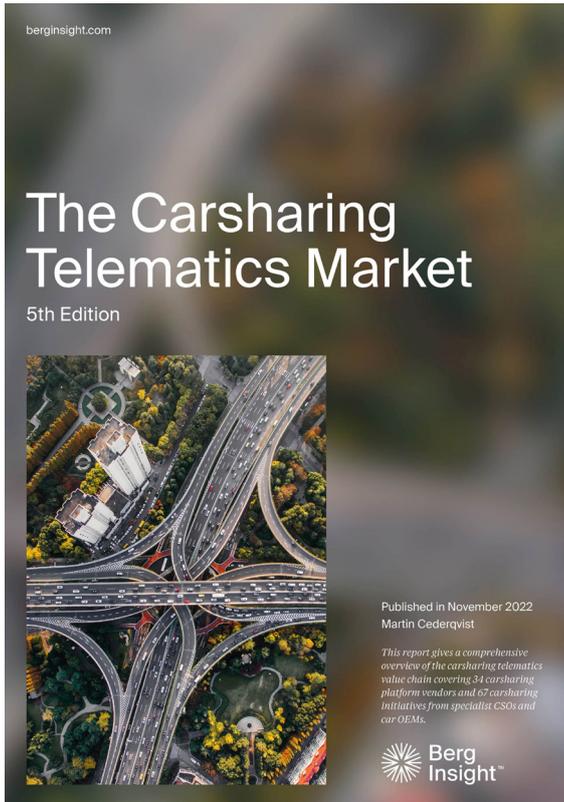
The report answers the following questions

- What is the current status of the carsharing telematics industry?
- Which are the leading carsharing telematics platform providers?
- How are carmakers positioning themselves on the carsharing market?
- What carsharing services are available from leading service providers today?
- What business models are used by carsharing companies?
- What technology choices are there for carsharing operators?
- How will the market evolve in Europe, North America and other parts of the world?
- How will the corporate carsharing market evolve in the upcoming years?



About Berg Insight's IoT market research

Our market reports offer comprehensive information and analysis on key IoT technologies and markets, addressing important concerns including total addressable market, market penetration, market shares, industry landscape, regulatory environment, market trends and forecasts. Our research portfolio today comprises more than 60 items, where each market report focuses on a specific vertical application area or cover horizontal themes. All market reports come with complementary data sets in Excel format that can be easily analysed and converted into tables and charts. We offer a range of different license options together with bundled packages and subscriptions to suit your specific needs.



AUTOMOTIVE

The Carsharing Telematics Market

What are the latest developments on the carsharing market? Berg Insight estimates that global carsharing membership will grow at a CAGR of 21.1 percent from 86.0 million at the end of 2021 to 224.3 million by 2026. This report explains all segments including station-based and free floating public carsharing as well as corporate carsharing. Get up to date with the latest information about carsharing organisations, vendors, products and markets.

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Who should read this report?

The Carsharing Telematics Market is the foremost source of information about the rapid adoption of carsharing technology. Whether you are a car manufacturer, telematics service provider, carsharing organisation, telecom operator, content provider, investor, consultant, or government agency, you will gain valuable insights from our in-depth research.

AUTHOR

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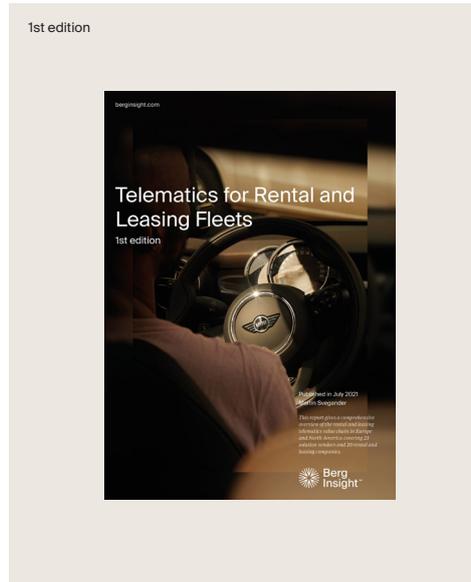


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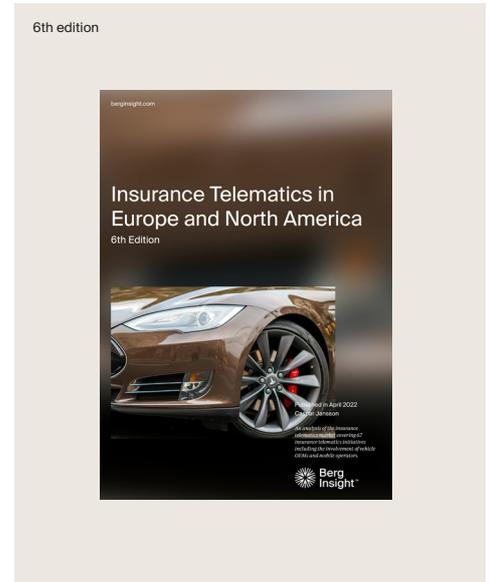
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