
# Fleet Management in Europe

17th edition

*Fleet management in Europe is the seventeenth consecutive report from Berg Insight analysing the latest developments on the commercial vehicle telematics market in this region. The report covers in-depth both OEM and aftermarket players and includes all the latest market data. This strategic research report from Berg Insight provides you with 240 pages of unique business intelligence, including 5-year industry forecasts, expert commentary and real-life case studies on which to base your business decisions.*

Berg Insight™

# The installed base of FM systems to reach 25 million units by 2026

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.

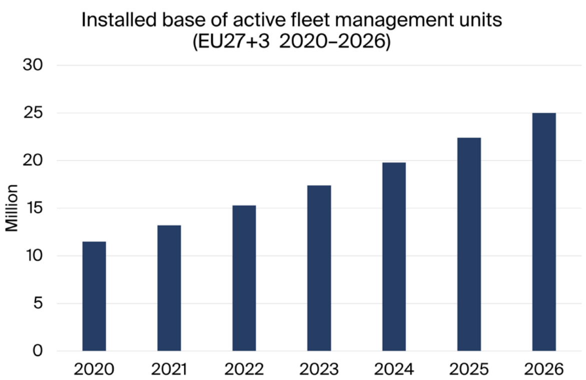
Commercial vehicle fleets play an essential role in the European economy. According to official statistics there were 41.1 million commercial vehicles in use in EU22+3 in 2020. The 6.7 million medium and heavy trucks accounted for more than 75 percent of all inland transports, forming a € 250 billion industry. Approximately 0.8 million buses and coaches stood for 9.3 percent of all passenger kilometres. The greater part of the 33.7 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 22.7 million passenger cars owned by companies and governments in EU27+3.

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 development of the general economy in the region and Ukraine crisis. The number of fleet management systems in active use is forecasted to grow at a compound annual growth rate of 13.6 percent from 13.2 million units at the end of 2021 to 25.0 million by 2026. The penetration rate in the total population of non-privately owned commercial vehicles and cars is estimated to increase from 20.8 percent in 2021 to 37.5 percent in 2026.

A group of international aftermarket solution providers have emerged as the leaders on the European fleet management market. Berg Insight ranks Webfleet as the largest vendor in Europe at the end of 2021 with 700,000 subscribers in the region, followed by Targa Telematics and Verizon Connect with 645,000 and 478,000 subscribers respectively. Transics is ranked as the largest player in the aftermarket heavy trucks segment with an estimated 190,000 active units installed. Other significant players include European companies such as ABAX, Bornemann, AddSecure Smart Transport, Michelin Connected Fleet, Gurtam, Radius Telematics, Viasat, GSGroup, Quartix, Océan (Orange), Microlise, Macnil, Eurowag Telematics, RAM Tracking and Coyote and international players like Trimble, Teletrac Navman, Inseego and Calamp from the US, Fleet Complete from Canada, Astrata Europe from Singapore and the South African telematics providers Cartrack and MiX Telematics.

All major truck manufacturers on the European market offer OEM telematics solutions as part of their product portfolio. 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. All medium and heavy duty trucks from Daimler Truck contains the Fleetboard vehicle computer as standard and the buses are equipped with OMNIplus ON. 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 2016. The leading OEMs in Europe are Scania, Daimler and Volvo with 363,000, 156,000 and 145,000 active FM subscribers respectively at the end of 2021.

The consolidation trend continues and seven M&A activities have taken place in 2022 so far. Infobric Group acquired Total Car's logbook and driver journal business. Zucchetti Group divested its share in Macnil back to the founders that now own 100 percent. The W.A.G. Payment Solutions (Eurowag) Group completed an acquisition of substantially all of the assets of WebEye. MiX Telematics acquired Trimble's Field Service Management's (FSM) business. ABAX acquired the fleet business of Connected Cars in Denmark. Main Capital Partners acquired a majority share in FleetGO and at the same time also Wanko. Finally, Eurowag announced the acquisition of INELO Group from Innova Capital. The transaction will expand Eurowag's geographic footprint across 16 European markets and roughly double its base of telematics devices.



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**Insights** from 50 new executive interviews with market leading companies.

**New data** on vehicle populations and commercial fleets in Europe.

**Comprehensive overview** of the fleet management value chain and key applications.

**In-depth analysis** of market trends and key developments.

**Updated** and new profiles of 116 aftermarket fleet management solution providers.

**Summary** of OEM propositions from truck, trailer and construction equipment brands.

**Revised market forecasts** lasting until 2026.

## This report answers the following questions

- What are the key drivers behind the adoption of FMS in Europe?
- Who are the leading providers of aftermarket fleet management solutions in Europe?
- What offerings are available from truck, trailer and construction equipment OEMs?
- What impact will standard factory installed FM systems from the OEMs have on the market?
- What are the FMS vendors' hardware strategies and thoughts on BYOD?
- How has the FMS market coped with the COVID-19 crisis?
- Will the FM industry consolidate further during 2023?
- How will the commercial vehicle telematics industry evolve in the future?


## 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.


TRANSPORT & LOGISTICS

# Fleet Management in Europe

How will the market for fleet management systems for commercial vehicles in Europe evolve in 2023 and beyond? Now in its seventeenth edition this strategy report from Berg Insight covers the latest trends and developments in the dynamic commercial vehicle telematics industry. Berg Insight forecasts that the number of fleet management systems in active use in the region is forecasted to grow at a CAGR of 13.6 percent from 13.2 million units at the end of 2021 to 25.0 million by 2026. Get up to date with the latest information about vendors, products and markets.

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## Who should read this report?

**Fleet Management in Europe** 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 based on hundreds of interviews with the companies involved in this market.

AUTHOR

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Johan is the CEO and co-founder of Berg Insight. He is a respected IoT industry expert, with 25 years' experience of strategy consulting, operations management and telecoms market research. His past research has covered automotive telematics, fleet management and industrial IoT topics. Johan is widely quoted in trade publications such as IoT Now Transport, Light Reading, Automotive World and IoT Business News. Johan holds a Master's degree in Electrical Engineering from Chalmers University of Technology in Sweden and a post graduate degree program in project management.

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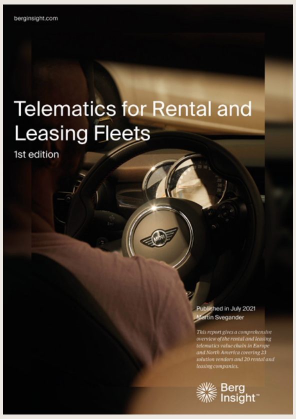


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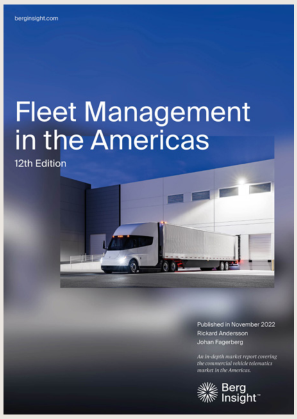


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