



# Fleet Management in South Africa

6th Edition

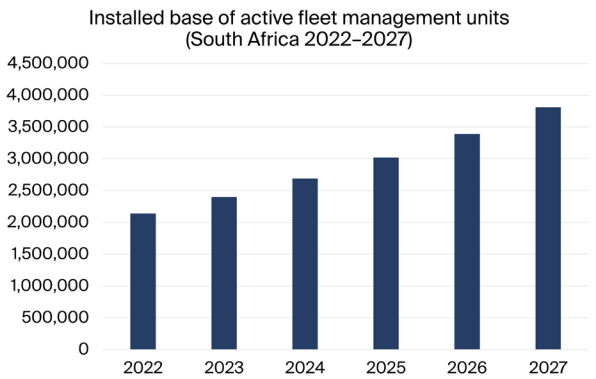
*Fleet Management in South Africa is the sixth consecutive report from Berg Insight analysing the latest developments on the South African fleet management market. The report also includes an outlook on the rest of the African market beyond South Africa. This strategic research report from Berg Insight provides you with 110 pages of unique business intelligence including 5-year industry forecasts and expert commentary on which to base your business decisions.*

# The installed base of FM systems in South Africa will reach 3.8 million units by 2027

Berg Insight expects a relatively strong growth period for fleet management in South Africa in the years to come. The number of fleet management (FM) systems in active use is forecasted to grow at a compound annual growth rate (CAGR) of 12.2 percent from about 2.1 million units at the end of 2022 to reach 3.8 million units by 2027. The penetration rate in the total population of fleet vehicles used by businesses is at the same time estimated to increase from 45.3 percent in 2022 to 69.9 percent in 2027. South Africa is a relatively mature telematics market and the penetration rate is comparably high from an international perspective. Far from all deployments are however full-scale advanced fleet management solutions. A notable share of the installed fleet telematics systems is represented by comparably low-end tracking systems, e.g. light FM solutions, including SVR systems extended with basic FM features.

The South African fleet management market is clearly dominated by five domestic players with broad telematics portfolios that together represent 70 percent of the total number of fleet management systems in use in the country. Berg Insight ranks Cartrack, Tracker and MiX Telematics as the largest providers of fleet management solutions in South Africa. Cartrack alone has more than half a million active FM units in the country. The remaining top-5 players are Ctrack and Netstar. Other top-10 players on the South African fleet management market include local providers such as Bidtrack

(Bidvest Group), Digicell and GPS Tracking Solutions (Eqstra Fleet Management), as well as international players including Webfleet (Bridgestone) and Gurtam. Lytx, Autotrak, Digital Matter, Scania and Powerfleet (Pointer SA) are additional top-15 providers, all having estimated installed bases of at least 15,000 fleet management units in the country. Players just outside of the top list include Key Telematics/Radius Payment Solutions, Geotab, Mtrack (Electronic Tracking Systems), iCAM Video Telematics, FleetCam and Globaltrack. In addition to Scania, comparably large installed bases of OEM fleet telematics systems in South Africa have also been achieved by manufacturers such as Daimler Truck, UD Trucks and Volvo Trucks.



## Highlights from the report

- Insights** from numerous interviews with market-leading companies.
- Data** on vehicle populations and commercial fleets in South Africa and other African countries.
- 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 2027.
- Outlook** on the African fleet management market beyond South Africa.



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### Glossary

## This report answers the following questions

- How does the fleet management market in South Africa compare with other markets?
- What is the price level of fleet telematics solutions in South Africa?
- Which are the leading domestic providers of aftermarket fleet management solutions?
- Which international fleet management providers are targeting the South African market?
- What hurdles are there for foreign players?
- What offerings are available from commercial vehicle OEMs?
- Will the FM industry consolidate further during 2023–2024?
- How will the commercial vehicle telematics industry evolve in the future?



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## Who should read this report?

Fleet Management in South Africa 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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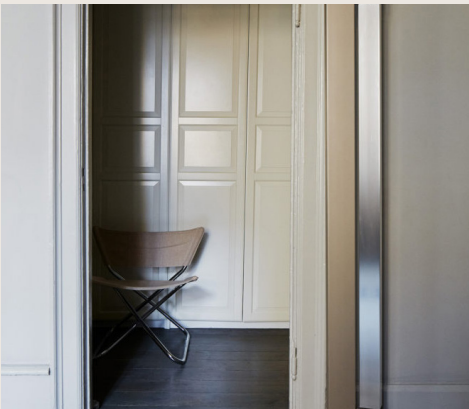


Rickard is a principal analyst with more than 10 years' experience in market research and advisory in the commercial telematics industry. His key areas of expertise include on-road and off-road fleet telematics including video telematics. Rickard has published research on various telematics topics including fleet management and asset management systems for diverse vehicle and asset types ranging from heavy trucks and light commercial vehicles to construction machinery and airport ground support equipment. Rickard joined Berg Insight in 2010 and holds a Master's degree in Industrial Engineering and Management from Chalmers University of Technology.

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