



# Fleet Management in the Americas

13th edition

*Fleet Management in the Americas is the thirteenth consecutive report from Berg Insight analysing the latest developments on the commercial vehicle telematics market in the Americas. 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 290 pages of unique business intelligence, including 5-year industry forecasts, expert commentary and real-life case studies on which to base your business decisions.*

# The top-30 FM providers in the Americas together have around 15 million active units

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 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 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. The same technology platform can furthermore also be used for regulatory compliance and reporting.

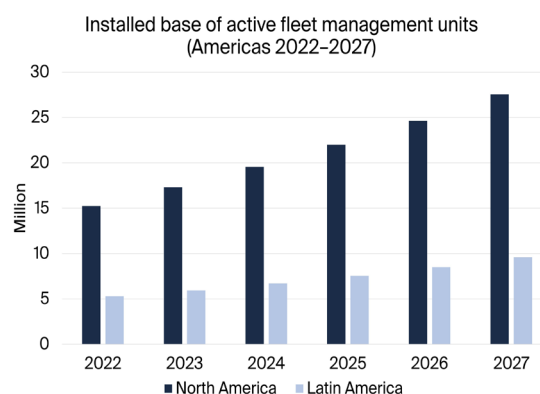
Commercial vehicle fleets play an essential role for the economy in both North and Latin America. In North America, there are approximately 29.9 million vehicles in commercial use. The number of commercial vehicles in operation in Latin America is estimated to 40.7 million. The fleet management solution market in the Americas has been in a growth period for many years. The global recession associated with the COVID-19 pandemic slowed down activities in 2020–2021 to some extent, but the current outlook is positive in spite of the challenging economic climate. The advanced North American market is among other things driven by regulatory developments such as the ELD mandates in the US and Canada. The Latin American market has often required an educational process to extend the perception of fleet telematics beyond security-related aspects. Latin American fleets have however also started to embrace optimisation functionality to an increasing extent.

Berg Insight expects the fleet management market to show healthy growth in 2024–2027. In North America, the number of systems in active use is forecasted to grow at a compound annual growth rate (CAGR) of 12.6 percent from 15.3 million units in 2022 to 27.6 million units by 2027. The penetration rate in the total population of non-private owned vehicles in commercial use is estimated to increase from 48.1 percent in 2022 to 75.0 percent in 2027. In Latin America, the number of systems in use is projected to increase from 5.3 million units in 2022, growing at a CAGR of 12.6 percent to reach 9.6 million units in 2027. The penetration rate in the region is estimated to increase from 15.8 percent in 2022 to 27.2 percent in 2027.

Geotab, Verizon Connect and Samsara are the leading fleet telematics providers in the Americas in terms of the number of active fleet management subscribers in the region. Canada-based Geotab is clearly in the lead with an installed base in the 3 million range, ahead of US-based Verizon Connect in second place followed by the relative newcomer Samsara. The remaining top-5 players in the

region are Solera Fleet Solutions and Trimble Transportation, both active in the industry for decades. Additional solution providers with more than half a million units include Lytx, CalAmp, Gurtam, Motive (formerly KeepTruckin) and Zonar Systems (Continental). In addition to Continental, the world leading tire manufacturers Michelin and Bridgestone have also established strong positions in the fleet management space through acquisitions. The remaining top-15 players include MICHELIN Connected Fleet, Bridgestone Mobility Solutions, Fleet Complete, GPS Insight (including Certified Tracking Solutions) and Powerfleet. The latter has recently announced an agreement with MiX Telematics to form a combined business which will be branded as Powerfleet. There are now more than 30 players with estimated installed bases of at least 100,000 active fleet management units in the Americas, including also Teletrac Navman, Ituran, WideTech, Encontrack, Pósitron (Stoneridge), Navixy (SquareGPS), Linxup, GPS Trackit, Autotrac, 3Dtracking, RedGPS, OnixSat, Omnilink, J. J. Keller, Scania, KORE Position Logic, MiX Telematics, IntelliShift, Sitrack and Satrack.

Most vehicle manufacturers now offer factory-installed fleet telematics solutions either independently or through partnerships. Examples of OEMs which have introduced systems in the Americas include Volvo Group, PACCAR, Daimler Truck, Navistar, Scania, Volkswagen, Iveco, Hino, Ford, GM, Mercedes-Benz Vans and Stellantis. The OEM telematics initiatives in the region have intensified over the years especially in North America, but the activities are also increasing in Latin America. In the last few years, several of the commercial vehicle OEMs have extended their partnership strategies and started working with additional aftermarket telematics partners, enabling fleet customers to choose the systems which best match their specific needs. Some OEMs such as Ford and GM have also in recent years introduced new proprietary fleet telematics solutions offered as an alternative alongside a growing selection of partner-powered offerings. Notable fleet telematics providers active in the OEM space in various ways include Platform Science, Geotab, Verizon Connect, Samsara, Trimble, Zonar Systems, Fleet Complete, MICHELIN Connected Fleet (Sascar) and Omnilink. The OEM channel is anticipated to increase in importance in both North America and Latin America in the coming years.





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### Glossary

## Highlights from the report

**Insights** from 30 new executive interviews with market-leading companies.

**New data** on vehicle populations and commercial fleets in the Americas.

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

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

**Updated profiles** of 86 aftermarket fleet management solution providers.

**Summary** of OEM propositions from commercial vehicle brands.

**Revised** market forecasts lasting until 2027.

## This report answers the following questions

- What is the geographical structure of commercial vehicle fleets in the Americas?
- Which are the leading providers of aftermarket fleet management solutions in the Americas?
- What offerings are available from commercial vehicle OEMs?
- How are the regulatory developments in the Americas affecting the FM industry?
- How is the shift towards standard hardware influencing the FM market in the Americas?
- What differences are there between the North and Latin American markets?
- Will the FM industry consolidate further in 2024 and beyond?
- 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 65 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 the Americas

Now in its thirteenth edition this strategic research report from Berg Insight covers the latest trends and developments in the dynamic telematics industry. This report covers in-depth both OEM and aftermarket players and includes all the latest market data. The number of systems in active use in the Americas is forecasted to grow at a compound annual growth rate (CAGR) of 12.5 percent from 20.6 million units in 2022 to 37.2 million units by 2027. 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 the Americas** is the foremost source of information about the commercial vehicle telematics and fleet management market. Whether you are a telematics hardware vendor, fleet management solution vendor, vehicle manufacturer, telecom operator, investor, consultant, or government agency, you will gain valuable insights from our in-depth research.

AUTHORS

## Rickard Andersson & Johan Fagerberg

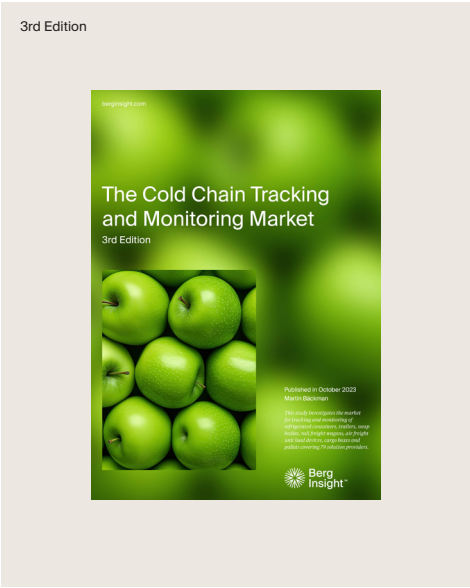


Rickard Andersson is a Principal Analyst with a Master's degree in Industrial Engineering and Management from Chalmers University of Technology. He joined Berg Insight in 2010 and his areas of expertise include on-road and off-road fleet telematics including video telematics.

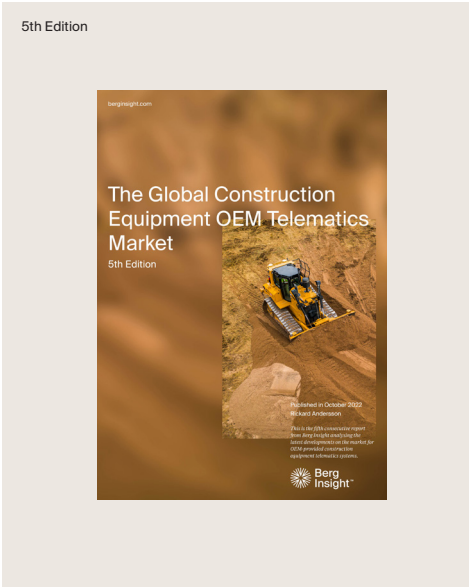


Johan Fagerberg is co-founder and an experienced analyst with a Master's degree in Electrical Engineering. His areas of expertise include automotive telematics, fleet management, satellite IoT and industrial IoT topics.

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CONTACT

Berg Insight AB  
Viktoriagatan 3  
411 25 Gothenburg  
Sweden

+46 (0)31 711 30 91  
[info@berginsight.com](mailto:info@berginsight.com)  
[www.berginsight.com](https://www.berginsight.com)



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