



Fleet Management in Australia and New Zealand

8th Edition

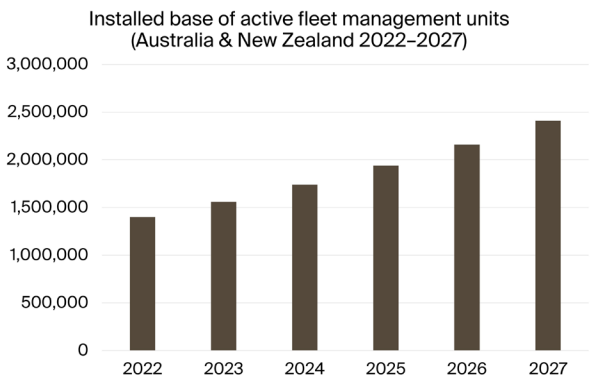
Fleet Management in Australia and New Zealand is the eighth consecutive report from Berg Insight analysing the latest developments on the commercial vehicle telematics market in this region. This strategic research report from Berg Insight provides you with 140 pages of unique business intelligence including 5-year industry forecasts and expert commentary on which to base your business decisions.

The installed base of fleet management systems in Australia and New Zealand will exceed 2.4 million units by 2027

The market for fleet management (FM) solutions in Australia and New Zealand 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 total number of FM systems in active use is forecasted to grow at a compound annual growth rate (CAGR) of 11.5 percent from about 1.4 million units in 2022 to over 2.4 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 24.7 percent in 2022 to 36.7 percent in 2027. The fleet telematics market in the region is influenced positively by regulatory developments related to health and safety regulations, chain of responsibility legislation, electronic work diaries and road user charges.

A large number of vendors are active on the FM market in Australia and New Zealand. Berg Insight ranks Teletrac Navman, EROAD and MTData as the largest providers of fleet management solutions in Australia and New Zealand. US-based Teletrac Navman (part of Vontier) was the first to reach 100,000 units in the region and this milestone has now also been achieved by New Zealand-based EROAD (including Coretex acquired in 2021) and Australia-based MTData (owned by Telstra). The remaining top-5 solution providers in the region are US-based Verizon Connect and Netstar Australia. US-based Rand McNally which acquired Fleetsu in Australia in 2022 is now also a significant player. Other notable vendors with estimated installed bases of at least 40,000 active units in the region include local solution providers such as Australia-based IntelliTrac and Linxio and New Zealand-based Smartrak (Constellation Software), as

well as international players including Canada-based Geotab and South Africa-based MiX Telematics. Fleet Complete, also based in Canada, entered the region through the acquisition of Geotab's reseller Securatrak. Additional top-15 players in the region are Digital Matter and Procon Telematics as well as Bridgestone Mobility Solutions' Webfleet and Fleetdynamics by Fleetcare. Solution vendors just outside of the top list moreover include Directed Technologies (Directed Electronics Australia), Sensium, Inseego, TrackIt and Microlise. Directed notably works with a large number of commercial vehicle OEMs on the local market. OEMs which have launched fleet telematics solutions in the region independently or through partnerships include UD Trucks/ Isuzu Group, Toyota, Hino, Mitsubishi, PACCAR, Volvo Group, Daimler Truck, Fuso, Scania, MAN and Iveco.



Highlights from the report

- Insights** from numerous interviews with market-leading companies.
- New data** on vehicle populations and commercial fleets in Australia and New Zealand.
- Comprehensive overview** of the fleet management value chain and key applications.
- In-depth analysis** of market trends and key developments.
- Updated profiles** of 34 aftermarket fleet management solution providers.
- Summary** of OEM propositions from commercial vehicle brands.
- Market forecasts** lasting until 2027.

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Glossary

This report answers the following questions

- Which are the leading local providers of aftermarket fleet management solutions?
- Which international fleet management providers are targeting Australia and New Zealand?
- What hurdles are there for foreign players?
- What offerings are available from commercial vehicle OEMs?
- What is the price level of fleet telematics solutions in the region?
- Will the FM industry consolidate further during 2024–2025?
- 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.

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Who should read this report?

Fleet Management in Australia and New Zealand 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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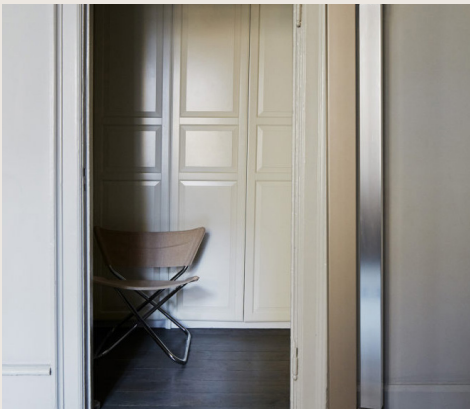


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