



Fleet Management in Latin America

1st Edition

Fleet Management in Latin America is a comprehensive 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 210 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 installed base of fleet management systems in Latin America will reach 17 million units by 2029

The fleet management solution market in Latin America has been in a growth period for many years. In addition to various local and regional solution providers, the region is increasingly served by international players – especially North American solution providers – seeking to expand the addressable market and maintain subscriber growth as the mature home markets inevitably approach peak penetration. Berg Insight expects that the penetration rate for fleet management will continue to increase in 2025–2029 across all parts of the Latin American region. The total number of fleet management systems in active use in the region is forecasted to grow at a compound annual growth rate (CAGR) of 15.0 percent from about 8.3 million units in 2024 to reach 16.6 million units by 2029. The penetration rate in the total population of fleet vehicles used by businesses is at the same time estimated to increase from 20.9 percent in 2024 to 40.0 percent in 2029.

The fleet management market in Latin America is served by a range of vendors of varying sizes and origins. One category is international aftermarket players including specialised FM providers and general telematics giants based in the Americas and EMEA. There are also a wide range of local aftermarket solution providers headquartered in Latin American countries, ranging from small players focusing exclusively on the respective domestic markets or even sub-regions to larger players with operations spanning foreign markets in Latin America and beyond in some cases. The region is further served by a relatively large number of North American solution providers that have expanded to Latin America, especially Mexico.

Berg Insight ranks Gurtam, MICHELIN Connected Fleet (MCF) and Geotab as the largest providers of fleet management solutions in Latin America, all having installed bases of several hundred thousand active units in the region. Active in the region since the late 2000s, Gurtam today works with a large number of partners offering its Wialon fleet management platform in various Latin American countries. Michelin acquired Brazil-based Sascar more than a decade ago and MCF today also has some presence in other countries in the region. Canada-based Geotab has been investing in Latin America for more than 15 years and the company has now surpassed 300,000 active subscriptions across all countries in the region. The remaining top-5 solution providers in Latin America are Israel-based Ituran and US-based Powerfleet.

Colombia-based WideTech is also a key player with a broad presence across many markets in Latin America. Other notable vendors include the white-label platform providers RedGPS and Navixy (SquareGPS) as well as the Brazilian fleet management solution provider Mobi7 owned by the leading car rental company Localiza. The Mexican satellite tracking company Encontrack is also a top-10 player. Solution vendors just outside of the top list moreover include the Brazilian players Pósitron (Stoneridge), Autotrac and Omnilink as well as US-based CalAmp and the Swedish commercial vehicle OEM Scania. 3Dtracking, Trucks Control, Wisetrack, Satrack, Sitrack, Digital Communications Technologies (DCT), Cobli, 3S Tecnologia, Location World, Numaris and Maxtrack are additional examples of significant solution providers, all having estimated installed bases in Latin America around the 100,000 range or above.

Automotive players serving the Latin American commercial vehicle market include OEMs from North America, Europe and Asia as well as some local manufacturers. Most major commercial vehicle manufacturers now offer factory-installed telematics devices and various degrees of fleet management functionality for their vehicles – either independently or in partnership with established FM solution providers. Examples include Volkswagen, Scania, International, Daimler Truck, Volvo Group, Iveco and PACCAR as well as Ford and GM which have all introduced OEM fleet telematics systems in their respective home markets as well as Latin America to varying extents.

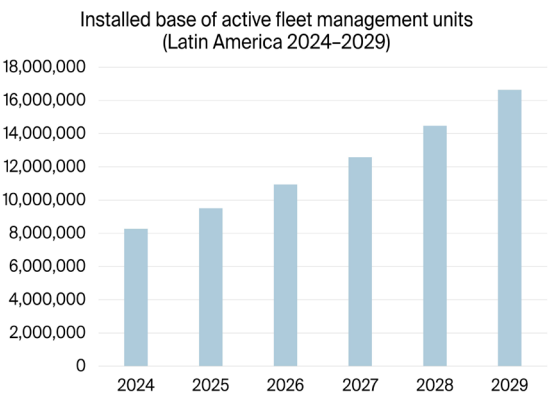


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Highlights from the report

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

New data on vehicle populations and commercial fleets in Latin America.

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

In-depth analysis of market trends and key developments.

Profiles of 80 aftermarket fleet management solution providers.

Summary of OEM propositions from commercial vehicle brands.

Revised market forecasts lasting until 2029.

This report answers the following questions

- Which are the leading local providers of aftermarket fleet management solutions?
- Which international fleet management solution providers target Latin America?
- How are North American vendors approaching the Latin American market?
- What hurdles are there for foreign solution vendors?
- 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 2025–2026?
- 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 80 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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Fleet Management in Latin America

How will the market for fleet management systems for commercial vehicles in Latin America evolve in 2025 and beyond? 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 Latin America is forecasted to grow at a compound annual growth rate (CAGR) of 15.0 percent from 8.3 million units in 2024 to 16.6 million units by 2029. 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 Latin America 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.

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