Fleet Management in Europe

20th Edition

Fleet management in Europe is the twentieth 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 280 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 30.5 million units by 2029

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.

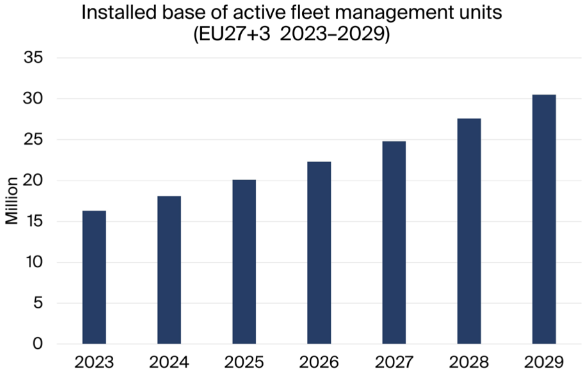
Commercial vehicle fleets play an essential role in the European economy. According to official statistics there were 44.4 million commercial vehicles in use in EU25+3 in 2023. The 6.9 million medium and heavy trucks accounted for more than 75 percent of all inland transports, forming a € 250 billion industry. Approximately 0.8 million buses and coaches stood for 9.3 percent of all passenger kilometres. The greater part of the 36.7 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 23.2 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 11.0 percent from 18.1 million units at the end of 2024 to 30.5 million by 2029. The penetration rate in the total population of non-privately owned commercial vehicles and cars is estimated to increase from 26.7 percent in 2024 to 42.8 percent in 2029.

The top-40 vendors have today more than 100,000 active units in Europe. A group of international aftermarket solution providers have emerged as the leaders on the European fleet management market. Berg Insight ranks Targa Telematics as the largest vendor in Europe at the end of 2024 with 900,000 subscribers in the region, followed by Webfleet and CalAmp with 752,000 and 600,000 subscribers respectively. AddSecure Smart Transport is ranked as the largest player in the aftermarket heavy trucks segment with an estimated 320,000 active units installed. Other significant players include European companies such as Radius Telematics, Microlise, Eurowag Telematics, ABAX, Shiftmove, Gurtam, Quartix, Bornemann, MICHELIN Connected Fleet, SCALAR by ZF, Linqo, RAM Tracking, Océan (Orange), Mapon, GSFleet, Macnil, AROBS Transilvania Software, Actia Telematics Services, Matrix iQ and Infobric Fleet and international players like Platform Science, Teletrac Navman, Powerfleet and Verizon Connect from the US, Geotab from Canada and the South African telematics providers Cartrack and Ctrack.

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 Volvo Connect as standard in Europe. New MAN trucks are now equipped with RIO as standard. DAF launched its new PACCAR Connect as standard in 2024 and includes 10 years of connectivity. The leading OEMs in Europe are Scania, Daimler Truck, Volvo Group and MAN with 461,000, 382,000, 364,000 and 264,000 active FM subscribers respectively at the end of 2024.

The consolidation trend continues and 11 M&A activities have taken place in 2025 so far. Mapon acquired the two fleet management companies Interkom in Sweden and Envirokind (known under the Fleet DATA brand) in Ireland. FleetGO Group acquired the Dutch software provider ScoreTrace and Awaken in France. H2 Equity Partners divested its majority share in RAM Tracking to Klipboard. The investment firm IK Investment Partners divested GeoDynamics to Blinqx. Movildata in Spain was separated from Verizon Connect in June 2025. The new owner is Unirte IOT, a company under control of Movildata's original CEO. Geotab acquired Verizon Connect's remaining commercial operations in Europe (including the UK, Ireland, Italy, France, Germany, the Netherlands, Poland and Portugal). Trakm8 was acquired by Brillian UK (part of Constellation Software) and subsequently delisted from the AIM stock exchange. AddSecure's Smart Transport UK business was in August acquired by Omegro and rebranded to Verilocation. Carsync merged with Motum, a specialist in digital claims and maintenance management.



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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 129 aftermarket fleet management solution providers.

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

Revised market forecasts lasting until 2029.

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 are the FMS vendors' hardware strategies and thoughts on BYOD?
- How has the FMS market coped with the current economic situation in Europe?
- What impact will standard factory installed FM systems from the OEMs have on the market?
- Will the FM industry consolidate further during 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.

TRANSPORT & LOGISTICS

Fleet Management in Europe

How will the market for fleet management systems for commercial vehicles in Europe evolve in 2026 and beyond? Now in its twentieth 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 11.0 percent from 18.1 million units at the end of 2024 to 30.5 million 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 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.

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 in 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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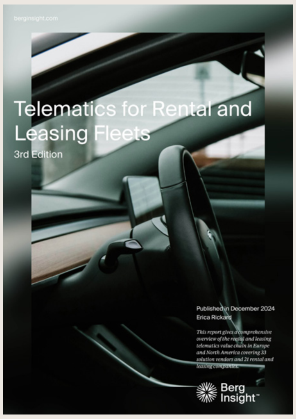

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