



Fleet Management in Australia and New Zealand

10th Edition

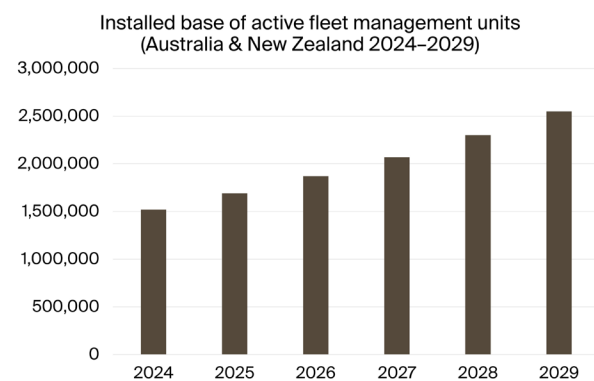
Fleet Management in Australia and New Zealand is the tenth consecutive report from Berg Insight analysing the latest developments on the commercial vehicle telematics market in this region. This strategic research report from Berg Insight provides you with 180 pages of unique business intelligence including 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 reach 2.6 million units by 2029

The market for fleet management (FM) solutions in Australia and New Zealand (ANZ) has been in a growth period for many years. The economic climate has been somewhat challenging in recent time but the current outlook is positive for the sector. 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. The total number of FM systems in active use in the ANZ region is forecasted to grow at a compound annual growth rate (CAGR) of 10.9 percent from about 1.5 million units in 2024 to reach 2.6 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 25.1 percent in 2024 to 36.3 percent in 2029.

A large number of vendors are active on the FM market in Australia and New Zealand. Berg Insight ranks Teletrac Navman, EROAD and Geotab as the leading providers of fleet management solutions in the ANZ region. US-based Teletrac Navman (part of Vontier) was the first to reach 100,000 units in the region followed by New Zealand-based EROAD (including Coretex acquired in 2021). This milestone has now also been achieved by Canada-based Geotab following a period of strong organic growth and most recently the acquisition of US-based Verizon Connect's commercial operations in Australia in October 2025. As a result, Geotab is now established as the largest player by far also in the ANZ region. Netstar Australia, part of South Africa-based Netstar which is a subsidiary of Altron, is also a top-5 player in the ANZ region followed by Australia-based Linxio (Banyan Software) and US-based Powerfleet. The latter has established a growing presence in this market following the acquisitions

of both South Africa-based MiX Telematics and Canada-based Fleet Complete in 2024. Fleet Complete itself entered the ANZ region through the acquisition of Geotab's reseller Securatrak almost a decade ago. Other notable vendors with estimated installed bases of over 40,000 active units in the region include New Zealand-based Smartrak (Constellation Software) as well as Australia-based IntelliTrac and MTDData. Currently owned by Telstra since 2017, MTDData is now in the process of being sold in a transaction expected to take place in the very near-term. Additional top-15 players in the ANZ region are Digital Matter, Directed Technologies, Procon Telematics and Fleetydynamics by Fleetcare, all based in Australia, as well as UK-based Radius. Directed notably works with a large number of commercial vehicle OEMs in the local market. OEMs which have launched fleet telematics solutions in the ANZ 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 38 aftermarket fleet management solution providers.

Summary of OEM propositions from commercial vehicle brands.

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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 2026–2027?
- How will the commercial vehicle telematics industry evolve in the future?



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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 Australia and New Zealand

PUBLISHED DATE December 2025

AUTHOR Rickard Andersson

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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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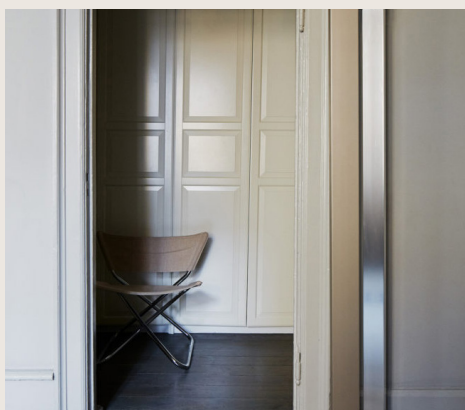


Rickard is a principal analyst with more than 15 years' experience in market research and advisory in the commercial telematics industry. His key areas of expertise include on-road and off-road fleet telematics including video telematics. Rickard has published research on various telematics topics including 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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