



# Fleet Management in Southeast Asia

2nd Edition

*Fleet Management in Southeast Asia from Berg Insight analyses the latest market developments in primarily Indonesia, Malaysia, Singapore, Thailand, the Philippines and Vietnam. This strategic research report from Berg Insight provides you with 120 pages of unique business intelligence including 5-year industry forecasts and expert commentary on which to base your business decisions.*

# The installed base of FM systems in Southeast Asia reached 4.0 million units in 2025

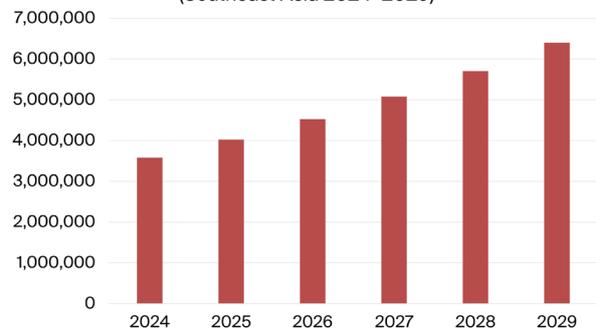
The market for fleet management (FM) solutions in Southeast Asia (SEA) has been in a growth period for several years. The market experienced quite significant setbacks during the pandemic, but the current outlook is positive due to several factors such as general economic growth, increasing competition in the transportation and logistics sector as well as a growing awareness of fleet telematics. The total number of FM systems in active use is forecasted to grow at a compound annual growth rate (CAGR) of 12.3 percent from about 3.6 million units in 2024 to almost 6.4 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 17.5 percent in 2024 to 27.1 percent in 2029.

The report covers the following key markets in Southeast Asia: Indonesia, Malaysia, Singapore Thailand, the Philippines and Vietnam as well as an overview of the Rest of SEA. The fleet management markets in Southeast Asia to a large extent resemble each other but are also affected by different regulations and general economic growth levels in the respective countries. Common characteristics between the markets include being less developed than other regions of the world and having comparably low penetration rates from an international perspective. Far from all deployments are full-scale advanced fleet management solutions and a notable share of the total installed base is represented by relatively basic tracking systems with fairly limited FM functionality compared with high-end solutions. The adoption of more feature-rich fleet management systems is however increasing across the region. One country that stands out from the crowd is Singapore, where more advanced fleet management solutions with a higher price point have had a higher adoption also historically. In recent years, video telematics has also experienced significant adoption across the region, driven by government initiatives to improve driver

and road safety. Video telematics is now a strategically important part of most vendors' offerings in Southeast Asia.

Berg Insight ranks Jimi IoT, Cartrack (Karoo) and TransTRACK as the largest providers of fleet management solutions in Southeast Asia. These three companies all have total installed bases of over 200,000 fleet management units in SEA on their respective platforms. Included in the top-5 are also Italian Tierra through its Indonesian subsidiary Weeo and DTC from Thailand. Other top-15 vendors with estimated installed bases of more than 40,000 active units in the region include local and regional solution providers such as Vietnamese BA GPS, Lithuania-based Gurtam, Onelink and GPSiam based in Thailand, WanWayTech from China, SquareGPS (Navixy) headquartered in the US, Indonesian EasyGo and McEasy, VIETMAP from Vietnam and Geotab from Canada. Additional notable vendors moreover include Astrata Group, V3 Smart Technologies and Overdrive IoT based in Singapore, the Malaysian companies Gussman Technologies, Total Dynamic, Katsana and Safetruck, EUPFin from Taiwan Swedish GpsGate, Radius Telematics from the UK, Thailand-based Nostra Logistics and Tramigo headquartered in Finland.

Installed base of active fleet management units (Southeast Asia 2024–2029)



## Highlights from the report

**Insights** from numerous interviews with market-leading companies.

**Data** on vehicle populations and commercial fleets in Southeast Asia.

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

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

**Profiles** of 42 aftermarket fleet management solution providers.

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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 Southeast Asia?
- 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?



## 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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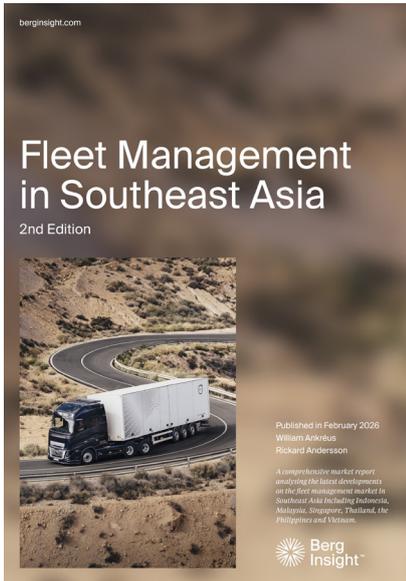
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## Who should read this report?

**Fleet Management in Southeast Asia** 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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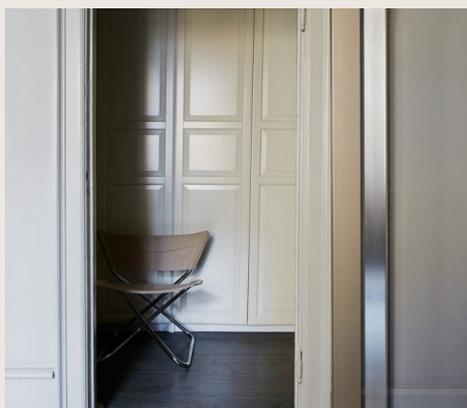


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