Telematics for Rental and Leasing Fleets

4th Edition

Telematics for Rental and Leasing Fleets is the fourth market report from Berg Insight analysing the latest developments on this market in Europe and North America covering 35 technology vendors and 14 car rental and leasing companies. This strategic research report from Berg Insight provides you with 155 pages of unique business intelligence including 5-year industry forecasts and expert commentary on which to base your business decisions.

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Rental and leasing telematics systems in active use in Europe and North America to reach 15.8 million by 2030

The concept of telematics is a combination of telecommunications – long-distance communications – and informatics – the science of information. Telematics in general thus refers to the collection of information related to remote objects such as vehicles via telecommunications networks. The introduction of telematics technology in the context of rental and leasing commonly supports asset management and stolen vehicle tracking as well as carsharing and digital mobility offerings. Solutions of the latter type generally enable automotive rental or leasing companies to differentiate their offerings to current and prospective clients. The connected car is a major trend in the automotive industry and most carmakers today offer telematics services as standard on new vehicles. Several categories of car telematics applications supported by both aftermarket and OEM systems are used by car rental and leasing companies. Examples include emergency calls and roadside assistance, stolen vehicle tracking and recovery (SVT/SVR), vehicle diagnostics, convenience applications, keyless vehicle access and usage-based pricing.

Car rental services allow customers to rent cars for a specific period, usually ranging from a few hours to a few weeks. The total average fleet managed by car rental companies in 2025 was about 4.84 million vehicles in Europe and North America. Vehicle leasing refers to the leasing of a motor vehicle for a fixed period at an agreed cost. The leasing market can broadly be divided into financial and full-service leasing. Vehicle leasing has historically been primarily a financial service, but many corporate customers now also outsource vehicle ownership and management through a full-service lease model. In a full-service lease, the client pays the leasing company a regular monthly payment to cover financing, vehicle depreciation and various services related to the use of the vehicle such as maintenance, replacement car, tyre management, telematics, fuel cards and insurance.

Berg Insight expects the number of telematics systems deployed by rental and leasing companies to increase at a steady rate over the next few years. Key influencers expected to boost the telematics market in this vertical include the connected car trend driven by vehicle OEMs and related service providers; the need for fleet owners to increase fleet utilisation and reduce their carbon footprint; the emergence of new mobility services; and the general electrification trend in the automotive industry. The total number of active OEM and aftermarket telematics systems in use on the European and North American rental and leasing market reached around 8.55 million at the end of 2025. The total installed base in Europe is forecasted to grow at a compound annual growth rate (CAGR) of 14.0 percent from 4.65 million in 2025 to 8.96 million in 2030. In North America, the total number of OEM and aftermarket telematics systems in use is forecasted to increase from around 3.90 million at the end of 2025 to reach 6.87 million by 2030, representing a CAGR of 12.0 percent. The telematics penetration rate in the total population of rental vehicles was about 52.2 percent in Europe and 59.0 percent in North America at year-end 2025. The corresponding numbers for the car leasing market were 46.0 percent in Europe and 54.6 percent in North America at the end of 2025.

The car rental and leasing markets are gradually consolidating, and a handful of major North American and European companies dominate each market. Rental and leasing companies with notable activities in implementing telematics include Enterprise Mobility, Hertz Global Holdings, Sixt Group, Avis Budget Group, Europcar Mobility Group, Arval, Alphabet, Element Fleet Management, Leasys and Ayvens. Players in the rental and leasing industry can either develop telematics programs independently or rely on partners to varying degrees. Multiple leading rental and leasing companies use a combination of centralised and decentralised telematics strategies across their footprints.

The telematics solution market for rental and leasing fleets is dominated by players such as Geotab, Targa Telematics, CalAmp (Lojack), OCTO Telematics, Webfleet, Powerfleet, MySmartObject, Munic, Zubie and RentalMatics. Leading hardware telematics vendors such as Teltonika Telematics and Ruptela are also serving the market. Other notable vendors in the market include 2hire, Bosch, Autofleet, Ufofleet and WITTE:digital. Several car rental management system providers such as Coastr, Emotion, Fourth Tier, HQ Rental Software and TSD Mobility Solutions partner with telematics service providers to integrate telematics data into their platforms. Multiple players specialising in carsharing telematics have broadened their product portfolio to target car rental and leasing companies. Examples include Invers, Vulog, Convadis, OpenFleet, WeGo Carsharing and Atom Mobility. Automotive OEMs are increasingly taking an active role in the ecosystem by offering OEM telematics services or utilising connected car services through their captive rental and leasing companies. Examples include General Motors, Stellantis, Volkswagen, Ford, Toyota, Tesla, BMW and Mercedes-Benz.

The installed base of telematics units in rental and leasing fleets (Europe and North America 2025–2030)

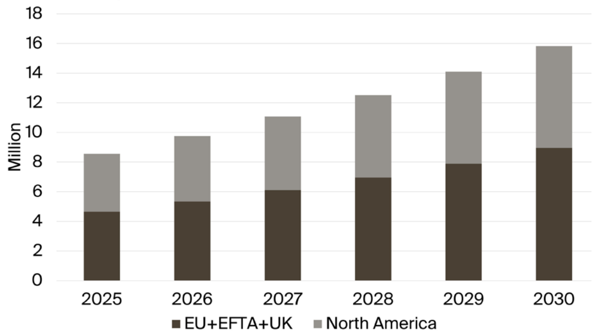

Table of contents

Executive Summary

1 Cars and Personal Mobility Services

1.1 The automotive market in Europe
1.1.1 Vehicles in use and car park density in Europe
1.1.2 New car registrations and leading manufacturers in Europe
1.2 The automotive market in North America
1.2.1 Vehicles in use and car park density in North America
1.2.2 New car registrations and leading manufacturers in North America
1.3 Car-based mobility services
1.4 The car rental market
1.4.1 Car rental operational models
1.4.2 Car rental seasonality
1.4.3 Fully digital and contactless car rental services
1.5 The car leasing market
1.5.1 Financial and full-service lease models
1.5.2 Second-hand market

2 Rental and Leasing Telematics Solutions

2.1 Introduction to telematics in the rental and leasing industry
2.2 Car telematics infrastructure
2.2.1 Vehicle segment
2.2.2 Tracking segment
2.2.3 Network segment
2.2.4 Service segment
2.3 Car telematics applications in the rental and leasing segment
2.3.1 eCall and roadside assistance
2.3.2 Stolen vehicle tracking
2.3.3 Usage-based insurance
2.3.4 Remote control and convenience services
2.3.5 Phone-as-a-Key technology and keyless vehicle access
2.3.6 Vehicle diagnostics and maintenance
2.3.7 Remote vehicle data monitoring
2.3.8 Tyre pressure monitoring systems
2.3.9 Fuel card integration and reporting
2.3.10 Driving data registration and analysis
2.3.11 Eco-driving schemes
2.4 Regulatory compliance and reporting
2.4.1 CSA – Compliance, Safety, Accountability
2.4.2 Hours-of-Service and electronic logging devices
2.4.3 Fuel tax reporting
2.4.4 Other applications

3 Market Forecasts and Trends

3.1 Market analysis and forecasts
3.1.1 Regional market dynamics
3.1.2 Rental and leasing companies' adoption of telematics systems
3.1.3 Telematics solution provider market shares
3.1.4 Market forecasts – telematics systems in Europe
3.1.5 Market forecasts – telematics systems in North America
3.2 Carsharing telematics in Europe and North America
3.2.1 Carsharing telematics in Europe
3.2.2 Carsharing telematics in North America
3.2.3 Telematics-based corporate carsharing
3.3 Value chain analysis
3.3.1 Automotive industry players
3.3.2 IT industry players
3.3.3 Rental and leasing industry players
3.3.4 Telematics industry players
3.3.5 Telecom industry players
3.4 Market trends
3.4.1 Telematics data and AI enable advanced and proactive fleet management
3.4.2 OEM embedded telematics data utilisation is accelerating
3.4.3 Data exchanges make OEM data available to independent service providers
3.4.4 OEM SVT services compete with aftermarket services in many countries
3.4.5 Rental and leasing to be increasingly integrated with mobility services
3.4.6 Carsharing becomes a popular means to reduce corporate mobility costs
3.4.7 Digital and contactless car rental services on the rise
3.4.8 The consolidation trend to continue in the rental and leasing markets
3.4.9 CRM solutions and vehicle diagnostics enable improved customer care
3.4.10 Telematics solutions facilitate corporate ESG reporting
3.4.11 Electric vehicles to drive telematics adoption

4 Rental and Leasing Companies

4.1 Car rental companies
4.1.1 Avis Budget Group
4.1.2 Drivalia
4.1.3 Enterprise Mobility
4.1.4 Europcar Mobility Group
4.1.5 Hertz Global Holdings
4.1.6 Sixt Group
4.2 Leasing and fleet management companies
4.2.1 Alphabet
4.2.2 Arval
4.2.3 Athlon
4.2.4 Ayvens
4.2.5 Element Fleet Management
4.2.6 Leasys
4.2.7 Lex Autolease
4.2.8 Wheels

5 Technology Vendors

5.1 End-to-end solution providers
5.1.1 2hire
5.1.2 Airmax Remote
5.1.3 CalAmp (LoJack International)
5.1.4 Geotab
5.1.5 Guidepoint Systems
5.1.6 Movitronic
5.1.7 Munic
5.1.8 OCTO Telematics
5.1.9 Powerfleet
5.1.10 Targa Telematics
5.1.11 Vulog
5.1.12 Webfleet
5.1.13 World Wide Mobility
5.1.14 Zubie
5.2 In-vehicle hardware solution providers
5.2.1 Bosch
5.2.2 Convadis
5.2.3 Invers
5.2.4 MySmartObject
5.2.5 Ruptela
5.2.6 Teltonika Telematics
5.2.7 WITTE:digital
5.3 Software platform providers
5.3.1 Atom Mobility
5.3.2 Autofleet
5.3.3 CT Mobility
5.3.4 MOQO
5.3.5 OpenFleet
5.3.6 RentalMatics
5.3.7 Ufofleet (by Ufodrive)
5.3.8 Vinli
5.3.9 WeGo Carsharing
5.4 Car rental management system providers
5.4.1 Coastr
5.4.2 Emotion
5.4.3 Fourth Tier
5.4.4 HQ Rental Software
5.4.5 TSD Mobility Solutions

Glossary

Hightlights from the report

Insights from 30 executive interviews with market leading companies.

New data on rental and leasing fleets.

Comprehensive overview of the rental and leasing telematics value chain.

In-depth analysis of market trends and key developments.

Case studies of telematics activities among 14 major car rental and leasing companies.

Detailed profiles of 35 technology vendors and their propositions.

Market forecasts by segment and region lasting until 2030.

The report answers the following questions

- What is the current state of telematics activities among rental and leasing fleets?
- Which are the leading providers of rental and leasing telematics services?
- How are the vehicle OEMs involved in the ecosystem?
- What technology choices are there for rental and leasing fleet operators?
- How will the market evolve in Europe and North America?
- What regional variations are there for rental and leasing telematics adoption?
- How will the telematics-based corporate carsharing market evolve in the upcoming years?
- Which are the key future trends in this industry?

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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 85 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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Telematics for Rental and Leasing Fleets

What are the latest developments on the rental and leasing telematics market in Europe and North America? This report gives a comprehensive overview of the rental and leasing telematics value chain covering 35 solution vendors and 14 car rental and leasing companies. Get up to date with the latest information about rental & leasing companies, vendors, products and markets.

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Who should read this report?

Telematics for Rental and Leasing Fleets is the foremost source of information about the rapid adoption of telematics technology among rental and leasing fleets. Whether you are a fleet manager, car rental company, leasing provider, car manufacturer, telematics service provider, telecom operator, investor, consultant, or government agency, you will gain valuable insights from our in-depth research.

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Erica is an IoT analyst covering IoT applications mainly in the automotive and micromobility sectors. She performs strategic analysis of OEM and aftermarket car telematics services, including carsharing telematics and telematics for rental and leasing fleets as well as bike and scootersharing telematics. Erica holds a Master’s degree in Quality and Operations Management from Chalmers University of Technology and joined Berg Insight in 2024.

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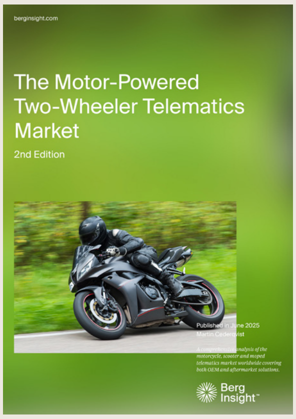

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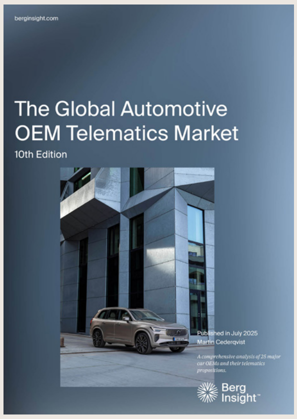

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