

Fleet Management in North America

16th Edition

Fleet Management in North America is the sixteenth 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 290 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 top-15 FM solution providers in North America together have 15 million active units

Fleet management (FM) 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 satellite and terrestrial wireless networks. Today, mobile networks can provide ubiquitous online connectivity in many regions 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 that link vehicles and enterprise IT systems. The same technology platform can furthermore also be used for regulatory compliance and reporting.

Commercial vehicle fleets play an essential role in the economy in North America. Compared with other transport modes, road transport offers unparalleled flexibility in many regards, not least due to the extensive set of vehicle types available for various purposes. There are approximately 34 million vehicles in fleet use on the North American market. The fleet management solution market in North America has been in a growth period for many years. Berg Insight expects the fleet management market to continue to show healthy growth in 2027–2030. The total number of fleet management systems in active use in the North American market is forecasted to grow at a compound annual growth rate (CAGR) of 11.2 percent from about 21.3 million units at the end of 2025 to reach 36.2 million units by 2030. The penetration rate in the total population of non-privately owned vehicles in commercial use is at the same time estimated to increase from 61.2 percent in 2025 to 89.7 percent in 2030.

A handful of solution providers have emerged as frontrunners in the fleet management market in North America and the top-5 players are all estimated to have reached the million mark in terms of installed base. Canada-based Geotab is clearly in the lead, having several million active fleet management subscribers in North America alone. Samsara is the runner-up ahead of CalAmp, Verizon Connect and Lytx, all based in the US. Additional solution providers with estimated installed bases of at least half a million units in North America include Motive, Platform Science, GPS Insight and Powerfleet. Platform Science has notably acquired Trimble's global transportation telematics business units while Powerfleet expanded its presence considerably through the acquisitions of both MiX Telematics and Fleet Complete. Other major players with decades of experience in the North American fleet management space include Solera Fleet Solutions and Zonar. The latter was acquired by GPS Trackit and the business has now transitioned to the Zonar brand. The remaining top-15 players with estimated installed bases of at least a couple of hundred thousand units include Bridgestone Mobility Solutions, Gurtam, One Step GPS and Forward Thinking Systems. Bridgestone is mainly represented by Azuga in the North American fleet telematics market. Forward Thinking Systems has recently acquired the Position Logic platform from KORE. Solution vendors just outside of the top list moreover include Teletrac Navman, Linxup (Klipboard), ZendulT, IntelliShift, Rastrac, MICHELIN Connected Fleet, FleetMovil (Guidepoint Systems), Rand McNally, J. J. Keller and Raven Connected. Linxup was acquired by Klipboard in October 2026. Other notable fleet management players active in North America include Positioning Universal, Radius, Netradyne, ISAAC Instruments, Questar Auto, Pedigree Technologies, EROAD, Konexial and BrickHouse GPS.

Most 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. The OEM telematics initiatives have intensified over the years, and large installed bases can now be found in the North American market, not least for systems powered by established aftermarket fleet management solution providers. Examples of manufacturers which have introduced OEM fleet telematics systems in North America include Daimler Truck, Volvo Group, PACCAR, International, Hino, Mercedes-Benz, Stellantis, Ford and GM. Basic telematics services such as remote diagnostics are increasingly included for free for the first years after purchasing a vehicle. Extended coverage and additional fleet management services are commonly offered as subscriptions. Several of the commercial vehicle OEMs have over time extended their partnership strategies and started working with additional aftermarket telematics partners, enabling fleet customers to choose the systems which best match their specific needs. Some OEMs such as Ford and GM have also in recent years introduced new proprietary fleet telematics solutions offered as alternatives alongside growing selections of partner-powered offerings. Notable fleet telematics providers active in the OEM space in various ways include Platform Science, Geotab, Verizon Connect, Samsara, Radius, Zonar and Powerfleet. Platform Science's Virtual Vehicle platform represents one of the most noteworthy developments in recent time. The Virtual Vehicle open OEM platform is adopted and backed by several of the most important brands in heavy trucking in North America. Additional partnerships between commercial vehicle manufacturers and specialised fleet management solution providers are expected to be unveiled in the near term.

Installed base of active fleet management units
(North America 2025–2030)

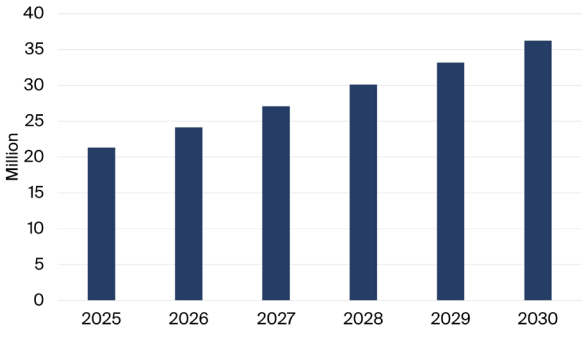


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6.31 ORBCOMM
6.32 Pedigree Technologies
6.33 Phillips Connect
6.34 Positioning Universal
6.35 PosiTrace
6.36 Prometheus
6.37 Quartix
6.38 Questar Auto
6.39 RAM Tracking (Klipboard)
6.40 Rand McNally
6.41 Rastrac
6.42 Raven Connected
6.43 RouteMate
6.44 SkyBitz (AMETEK)
6.45 Solera Fleet Solutions
6.46 Verizon Connect
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Glossary

Hightlights from the report

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

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

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

In-depth analysis of market trends and key developments.

Updated profiles of 59 aftermarket fleet management solution providers.

Summary of OEM propositions from commercial vehicle brands.

Revised market forecasts lasting until 2030.

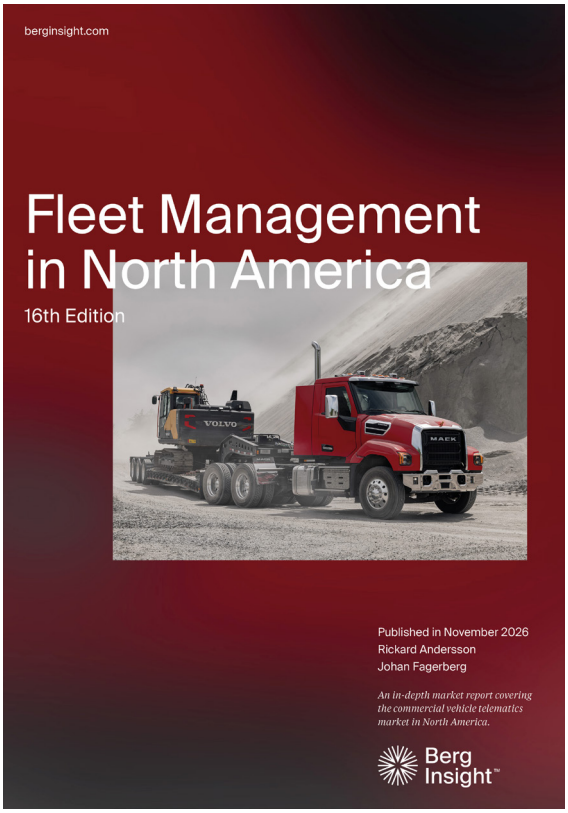
This report answers the following questions

- What is the structure of commercial vehicle fleets in North America?
- Which are the leading providers of aftermarket fleet management solutions in North America?
- What offerings are available from commercial vehicle OEMs?
- What is the price level of fleet telematics solutions in the region?
- How is the shift towards standard hardware affecting the FM market in North America?
- How are the regulatory developments in North America affecting the FM industry?
- Will the FM industry consolidate further in 2027 and beyond?
- How will the commercial vehicle telematics industry evolve in the future?



About Berg Insight's IoT market research

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Fleet Management in North America

How will the market for fleet management systems for commercial vehicles in North America evolve in 2027 and beyond? Now in its sixteenth edition 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 North America is forecasted to grow at a compound annual growth rate (CAGR) of 11.2 percent from 21.3 million units in 2025 to 36.2 million units by 2030. 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 North 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 solutions vendor, vehicle manufacturer, telecom operator, investor, consultant, or government agency, you will gain valuable insights from our in-depth research.

AUTHORS

Rickard Andersson & Johan Fagerberg



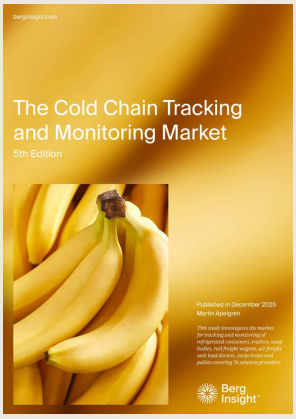
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