

Fleet Management in Europe



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- **Comprehensive overview** of the fleet management value chain and key applications.
- **In-depth analysis** of market trends and key developments.
- **Updated profiles** of 94 aftermarket fleet management solution providers.
- **Summary** of OEM propositions from truck, trailer and construction equipment brands.
- **Revised** market forecasts lasting until 2019.



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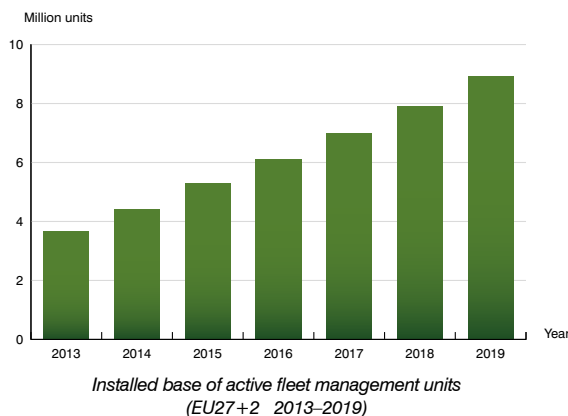
The installed base of FM systems to double in the next 5 years

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 communication 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 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 36.1 million commercial vehicles in use in EU23+2 in 2011. The 5.9 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. Last but not least, the greater part of the 29.5 million light commercial vehicles (LCV) in Europe was used by mobile workers and for activities such as distribution of goods and parcels.

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 local economic developments. The number of fleet management systems in active use is forecasted to grow at a compound annual growth rate of 15.1 percent from 4.40 million units at the end of 2014 to 8.90 million by 2019. The penetration rate in the total population of non-privately owned commercial vehicles is estimated to increase from 14.8 percent in 2014 to 28.4 percent in 2019.

A group of international aftermarket solution providers have emerged as the leaders on the European fleet management market. TomTom Telematics was the fastest growing vendor also in 2014 and has climbed to the number one spot in Europe ahead of Masternaut. Transics is ranked as the largest player in the heavy trucks segment with an estimated 90,000 active units installed. Other significant players include European companies such as Trakm8, Microlise, ►



► Quartix, Tantalum Corporation, Orange Business Services, Vehco and Finder and international players like Trimble and Navman Wireless from the US, Astrata Europe from Singapore and the South African telematics providers DigiCore and MiX Telematics.

All major truck manufacturers on the European market offer OEM telematics solutions as a part of their product portfolio. Mercedes-Benz, Volvo and Scania launched their first products in the 1990s followed by MAN in 2000, Renault Trucks in 2004, DAF Trucks in 2006 and Iveco in 2008. 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. The new generation of the Actros trucks from Mercedes-Benz contains the FleetBoard vehicle computer as standard in all EU27 countries since October 2011. Volvo is going in the same direction offering Dynafleet as standard in Europe. MAN TeleMatics is since July 2012 standard on the truck model TGX EfficientLine including a 4-month trial for the service. DAF Trucks will launch a completely new in-house developed solution in Q4-2015 that will become standard on the larger truck models.

The consolidation trend continues and numerous M&A activities took place in 2015. Fleetmatics acquired Ornicar in February 2015 – a local FM solution provider in France adding around 15,000 vehicle subscriptions. In March 2015, a decision was made to merge the two Danaher Corporation owned companies Navman Wireless and Teletrac. Later in April, Orange Business Services acquired OCEAN that now operates as a subsidiary with the OCEAN brand name. Novatel Wireless announced a bid to acquire DigiCore in June in a deal worth US\$ 87 million. In the same month, Viasat announced to have acquired a controlling interest in Cefin Systems. Goldman Sachs Merchant Banking Division and GRO Capital announced the acquisition of Trackunit from the founders of the company in July. Thermo King acquired Celtrak in October. The latest transaction was done in November when Fleetmatics acquired Visirun in Italy adding 28,000 subscriptions and 3,000 clients.

This report answers the following questions:

- What are the key drivers behind the adoption of FMS in Europe?
- What is the geographical and ownership structure of commercial vehicle fleets in Europe?
- Who are the leading international and regional providers of aftermarket fleet management solutions in Europe?
- What offerings are available from truck, trailer and construction equipment OEMs?
- What impact will the launch of standard factory installed FM systems from the OEMs have on the market?
- Will the FM industry consolidate further during 2016?
- How will the commercial vehicle telematics industry evolve in the future?

Executive summary

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About the Author



Johan Fagerberg is co-founder and an experienced analyst with a Masters degree in Electrical Engineering from Chalmers University of Technology. His areas of expertise include location-based services and wireless M2M markets, with a special focus on fleet management and car telematics.

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