Fleet management in Europe is the eleventh consecutive report from Berg Insight analysing the latest developments on the fleet management market in this region.

This strategic research report from Berg Insight provides you with 200 pages of unique business intelligence, including 5-year industry forecasts, expert commentary and real-life case studies on which to base your business decisions.

Highlights from the eleventh edition of this report:

- **Insights** from 50 new executive interviews with market leading companies.
- **New** data on vehicle populations and commercial fleets in Europe.
- **Comprehensive** overview of the fleet management value chain and key applications.
- **In-depth** analysis of market trends and key developments.
- **Updated** profiles of 99 aftermarket fleet management solution providers.
- **Summary** of OEM propositions from truck, trailer and construction equipment brands.
- **Revised** market forecasts lasting until 2020.
The installed base of FM systems to reach 10.6 million units by 2020

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 36.2 million commercial vehicles in use in EU23+2 in 2014. The 5.8 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 29.7 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 14.9 percent from 5.3 million units at the end of 2015 to 10.6 million by 2020. The penetration rate in the total population of non-privately owned commercial vehicles is estimated to increase from 18.1 percent in 2015 to 34.4 percent in 2020.

A group of international aftermarket solution providers have emerged as the leaders on the European fleet management market. Berg Insight ranks TomTom Telematics as the largest vendor in Europe at the end of 2015 as the leaders on the European fleet management market. Berg Insight is of the opinion that the European fleet management solutions from the OEMs have on the market?

The installed base of active fleet management units (EU27+2 2014–2020)
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/IoT markets, with a special focus on fleet management and car telematics.

Berg Insight offers premier business intelligence to the telecom industry. We produce concise reports providing key facts and strategic insights about pivotal developments in our focus areas. Berg Insight also offers detailed market forecast databases and advisory services. Our vision is to be the most valuable source of intelligence for our customers.

Who should buy this report?

**Fleet Management in Europe** 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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- Fleet Management in the Americas
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