M2M Research Series

Fleet Management in Europe

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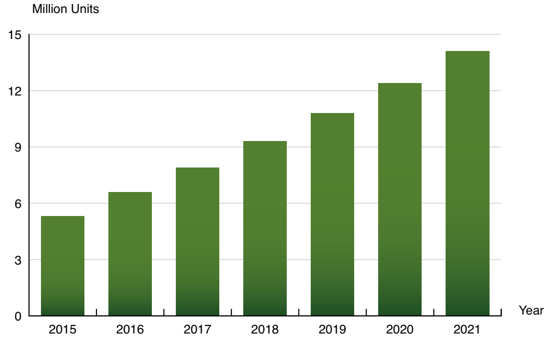
The installed base of FM systems to reach 14.1 million units by 2021

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 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 36.6 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. The greater part of the 30.0 million light commercial vehicles (LCV) in Europe was used by mobile workers and for activities such as distribution of goods and parcels. Last but not least, there are an estimated 12.6 million passenger cars owned by companies and governments.

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 16.4 percent from 6.6 million units at the end of 2016 to 14.1 million by 2021. The penetration rate in the total population of non-privately owned commercial vehicles and cars is estimated to increase from 15.6 percent in 2016 to 31.6 percent in 2021.

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 2016 with 609,000 subscribers in the region. Masternaut still holds the number two spot. Transics is ranked as the largest player in the heavy trucks segment with an estimated 120,000 active units installed. Other significant players include European companies such as Microlise, ABAX, Viasat, Bornemann, Trakm8, Quartix, OCEAN (Orange Business Services), EcoFleet, GSGroup and Vehco and international players like Verizon, Trimble and Teletrac Navman from the US, Astrata Europe from Singapore and the South African telematics providers Ctrack (Inseego) and MiX Telematics.



Installed base of active fleet management units (EU27+2 2015–2021)

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 EU28 countries since October 2011. Volvo is going in the same direction offering Dynafleet as standard in Europe. New MAN trucks are now equipped with RIO as standard replacing MAN TeleMatics introduced in July 2012. DAF launched its new optional fleet management solution DAF Connect that has been developed in-house in September 2016. The leading OEMs in Europe are Scania, Daimler and Volvo with 172,000, 99,000 and 99,000 active FM subscribers respectively at the end of 2016.

The consolidation trend continues and numerous M&A activities have taken place in 2017. In January, Viasat Group acquired MobileFleet (majority stake adding about 23,000 subscribers). In February, Princip was acquired by W.A.G. Payment Solutions which is among the six largest European providers of payment solutions for road mobility. Viasat Group continued its acquisition spree in May 2017 when buying ICOM in Bulgaria. One of the largest transactions this year was when Investcorp acquired ABAX in June 2017, paying NOK 1.8 billion (US$ 210 million). Isotrak acquired UK Fleet Management technology business VeriLocation in June 2017. The latest transaction was done in July 2017 when TIMKEN acquired Groeneveld Group that owns Groeneveld ICT Solutions.

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?
- What are the FMS vendors' hardware strategies and thoughts on BYOD?
- Will the FM industry consolidate further during 2017–2018?
- How will the commercial vehicle telematics industry evolve in the future?

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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/IoT markets, with a special focus on fleet management and car telematics.

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