M2M Research Series

Fleet Management in Europe

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BERG INSIGHT

The installed base of FM systems to reach 17.6 million units by 2023

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 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 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.

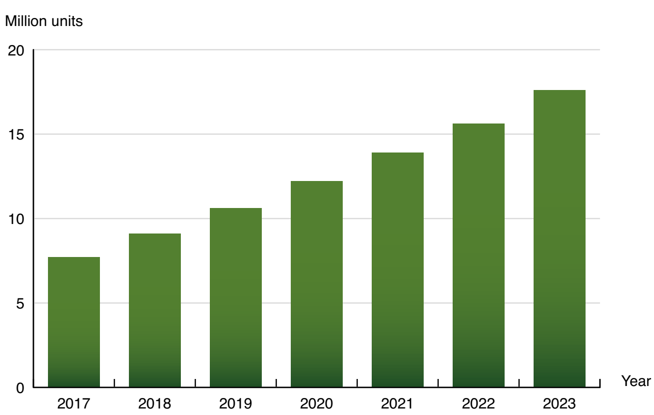
Commercial vehicle fleets play an essential role in the European economy. According to official statistics there were 38.6 million commercial vehicles in use in EU23+2 in 2016. The 6.2 million medium and heavy trucks accounted for more than 75 percent of all inland transports, forming a € 250 billion industry. Approximately 0.8 million buses and coaches stood for 9.3 percent of all passenger kilometres. The greater part of the 31.6 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 21.0 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 14.1 percent from 9.1 million units at the end of 2018 to 17.6 million by 2023. The penetration rate in the total population of non-privately owned commercial vehicles and cars is estimated to increase from 17.4 percent in 2018 to 32.0 percent in 2023.

A group of international aftermarket solution providers have emerged as the leaders on the European fleet management market. Berg Insight ranks Webfleet Solutions (formerly TomTom Telematics) as the largest vendor in Europe at the end of 2018 with 770,000 subscribers in the region, followed by Verizon Connect in second place with 300,000 subscribers. Transics is ranked as the largest player in the aftermarket heavy trucks segment with an estimated 136,000 active units installed. Other significant players include European companies such as ABAX, Masternaut, Targa Telematics, Microlise, Viasat, Bornemann, OCEAN (Orange), Macnil, GSGroup, Quartix, Eurowag Telematics, Trakm8, Optimum Automotive, Connexas Group and Vehco and international players like Trimble and Teletrac Navman from the US, Fleet Complete from Canada, Astrata Europe from Singapore and the South African telematics providers Ctrack (Inseego), Cartrack and MiX Telematics.

All major truck manufacturers on the European market offer OEM telematics solutions as a part of their product portfolio. 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. All medium and heavy duty trucks and buses from Daimler contains the Fleetboard vehicle computer as standard. Volvo offers Dynafleet as standard in Europe. New MAN trucks are now equipped with RIO as standard replacing MAN TeleMatics. DAF launched its new optional DAF Connect that has been developed in-house in September 2016. The leading OEMs in Europe are Scania, Volvo and Daimler with 255,000, 128,000 and 117,000 active FM subscribers respectively at the end of 2018.

The consolidation trend continues and 12 M&A activities have taken place in the past year. Year 2019 started off with a new FMS mega deal when TomTom Telematics was divested to Bridgestone Europe for a purchase price of € 910 million. BigChange in the UK acquired Labyrinth Logistics and Trace Systems and Vehco bought Paetronics in Finland adding 350 clients. In April, Radius Payment Solutions acquired Plant-I and later in November also Sure-Track. The IT-company Triona acquired Fleetech in April. Masternaut once again changed owner in May when Michelin announced the addition of the company to its commercial vehicle telematics investment. Connexas Group acquired the cold-chain specialist Seven Telematics in May. The latest transaction was done in September when Vehco acquired Framlogic in Poland, adding 650 clients and 25,000 equipped vehicles.



Installed base of active fleet management units (EU27+2 2017–2023)

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 2020?
- 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 wireless M2M/IoT markets, with a special focus on fleet management and car telematics.

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