

Fleet Management in Europe

Fleet management in Europe is the seventh 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 150 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 seventh edition of this report:

- **Insights** from 40 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 67 aftermarket fleet management solution providers.
- **Summary** of OEM propositions from truck, trailer and construction equipment brands.
- **Revised** market forecasts lasting until 2016.

Berg Insight's M2M Research Series

What are the key business opportunities in the emerging wireless M2M market? Berg Insight's M2M Research Series is a unique series of market reports published on a quarterly basis. Each title offers detailed analysis of a specific vertical application area such as smart metering, fleet management or vehicle telematics. Once per year we also publish summaries of our research with detailed forecasts for the Global and European wireless M2M markets, respectively.

www.berginsight.com



Order now!

Please visit our web site to order this report and find more information about our other titles at www.berginsight.com

See inside for further details →



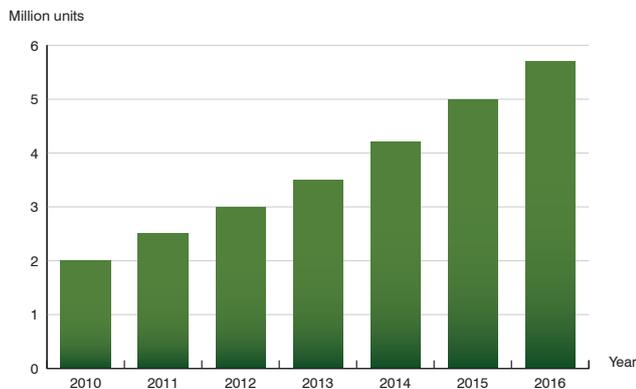
A second wave of market consolidation anticipated for 2013

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 35.5 million commercial vehicles in use in EU23+2 in 2008. The 6.2 million medium and heavy trucks accounted for more than 75 percent of all inland transports, forming a € 250 billion industry. Approximately 0.7 million buses and coaches stood for 9.3 percent of all passenger kilometres. Last but not least, the greater part of the 28.6 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 17.9 percent from 2.5 million units at the end of 2011 to 5.7 million by 2016. The penetration rate in the total population of non-privately owned commercial vehicles is estimated to increase from 8.8 percent in 2011 to 20.1 percent in 2016.

A group of international aftermarket solution providers have emerged as the leaders on the European fleet management market. Masternaut is ranked as the largest player overall in terms of installed base with close to 250,000 units deployed, mainly in France and the UK. TomTom Business Solutions was the fastest growing vendor also in 2011 and has now surpassed 200,000 subscribers. Transics is number one in the ►



Installed base of active fleet management units (EU27+2 2010–2016)

► heavy trucks segment with an estimated 75,000 active units installed. Other significant players include European companies such as Vehco, Navman Wireless, TRACKER and Traffimaster and international players like Trimble and Qualcomm from the US 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 and followed by MAN in 2000, Renault Trucks in 2004, DAF Trucks in 2006 and Iveco in 2008. The products are all supporting the FMS standard and can generally be deployed in mixed fleets even if some functionality can be brand-specific. A major trend in the past year 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 four 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 some markets. MAN TeleMatics is since July 2012 standard on the new truck model TGX EfficientLine including a 4-month trial for the service.

Nine major merger and acquisition activities took place in Europe during 2010 and the first half of 2011. In the past twelve months there has been a considerable slowdown of activities and no major events occurred. Berg Insight anticipates that a second wave of consolidation is likely to start in 2013. The latest transaction was done in June 2011 when Transics acquired the European activities of CarrierWeb. Francisco Partners acquired Masternaut in April 2011 forming the leading player in Europe from the Masternaut and Cybit operations. Another acquisition was done by Vehco in Sweden that acquired Elomobile in France in March 2011. Trimble acquired Punch Telematix in July 2010 and DigiCore acquired in the same month Minorplanet in the UK along with the associated businesses in the Netherlands, Belgium and Germany.

This report answers the following questions:

- Is the European fleet management market back on a growth track after the economic crisis?
- Will the FM industry consolidate further during 2012 and 2013?
- 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?
- How will the commercial vehicle telematics industry evolve in the future?

► Table of Contents

Executive summary

1 Commercial vehicle fleets in Europe

- 1.1 Light commercial vehicles
- 1.2 Medium and heavy trucks
- 1.3 Buses and coaches
- 1.4 Trailers and semi-trailers
- 1.5 Off-road construction and agriculture equipment
- 1.6 Ownership structure
- 1.6.1 Statistical estimates by industry and company size
- 1.6.2 Light commercial vehicle fleets
- 1.6.3 Medium and heavy commercial vehicle fleets

2 Fleet management solutions

- 2.1 Fleet management infrastructure
- 2.1.1 Vehicle segment
- 2.1.2 GNSS segment
- 2.1.3 Network segment
- 2.1.4 Backoffice segment
- 2.2 Vehicle management
- 2.2.1 Vehicle diagnostics and maintenance planning
- 2.2.2 Security tracking
- 2.3 Driver management
- 2.3.1 Driving data registration and analysis
- 2.3.2 Eco-driving schemes
- 2.3.3 Insurance risk management
- 2.4 Operations management
- 2.4.1 Routing and navigation
- 2.4.2 Transport management
- 2.4.3 Mobile workforce management
- 2.5 Regulatory compliance and reporting
- 2.5.1 Digital tachograph data download
- 2.5.2 Electronic toll collection
- 2.5.3 Other applications
- 2.6 Business models

3 Market forecasts and trends

- 3.1 Market analysis
- 3.1.1 Installed base and unit shipments
- 3.1.2 Regional markets
- 3.1.3 Vendor market shares
- 3.2 Market drivers and barriers
- 3.2.1 Macroeconomic environment
- 3.2.2 Regulatory environment
- 3.2.3 Competitive environment
- 3.2.4 Technology environment
- 3.3 Value chain analysis
- 3.3.1 Telematics industry players
- 3.3.2 Automotive industry players
- 3.3.3 Telecom industry players
- 3.3.4 IT industry players
- 3.4 Future industry trends

4 OEM products and strategies

- 4.1 Truck manufacturers
- 4.1.1 Daimler Group
- 4.1.2 Volvo Group
- 4.1.3 Scania
- 4.1.4 MAN Truck & Bus
- 4.1.5 DAF Trucks
- 4.1.6 Iveco
- 4.2 Construction equipment manufacturers
- 4.2.1 Bobcat and JCB
- 4.2.2 Caterpillar
- 4.2.3 Hyundai Construction Equipment
- 4.2.4 John Deere
- 4.2.5 Komatsu
- 4.2.6 Volvo CE
- 4.3 Trailer manufacturers
- 4.3.1 Schmitz Cargobull
- 4.3.2 Krone
- 4.3.3 Kögel
- 4.4 OE suppliers
- 4.4.1 Actia
- 4.4.2 Continental
- 4.4.3 Haldex
- 4.4.4 Stoneridge Electronics
- 4.4.5 WABCO
- 4.5 Hardware and software providers
- 4.5.1 Advantech-DLoG
- 4.5.2 Aplicom
- 4.5.3 Calamp
- 4.5.4 Mobile Devices
- 4.5.5 Phoenix International
- 4.5.6 Pointer Telocation
- 4.5.7 Quake Global
- 4.5.8 Squarell

5 International aftermarket solution providers

- 5.1 DigiCore
- 5.2 Garmin and partners
- 5.3 Masternaut
- 5.4 MiX Telematics
- 5.5 Navman Wireless
- 5.6 Qualcomm Enterprise Services
- 5.7 TomTom Business Solutions
- 5.8 Trafficmaster
- 5.9 Transics
- 5.10 Trimble
- 5.11 Vehco

6 Regional aftermarket solution providers

- 6.1 Benelux and France
- 6.1.1 Eliot
- 6.1.2 Fleetlogic
- 6.1.3 Geodynamics
- 6.1.4 GreenCat
- 6.1.5 IT Mobile

- 6.1.6 Micpoint
- 6.1.7 Novacom Europe
- 6.1.8 OCEAN
- 6.1.9 Orange Business Services
- 6.1.10 RAM Mobile Data
- 6.1.11 Traqueur
- 6.2 Germany and Central Europe
- 6.2.1 AutoGuard
- 6.2.2 CVS Mobile
- 6.2.3 ETA Automatizari Industriale
- 6.2.4 Euro Telematik
- 6.2.5 Falcom
- 6.2.6 Finder
- 6.2.7 Framelogic
- 6.2.8 IAV
- 6.2.9 Idem
- 6.2.10 Mireo
- 6.2.11 Mobile Objects
- 6.2.12 Sherlog Trace
- 6.2.13 Telargo
- 6.2.14 Yellowfox
- 6.3 The Mediterranean
- 6.3.1 Cefin Systems
- 6.3.2 Cobra Automotive Technologies
- 6.3.3 Coordina
- 6.3.4 Datatronics Mobility
- 6.3.5 Detector
- 6.3.6 Frotcom International
- 6.3.7 G4S Telematix
- 6.3.8 Inosat
- 6.3.9 Loqus
- 6.3.10 MobiVision
- 6.3.11 Tecmic
- 6.4 Nordic countries
- 6.4.1 Consafe Logistics
- 6.4.2 Fleet 101
- 6.4.3 Fleetech
- 6.4.4 GateHouse
- 6.4.5 Locus
- 6.4.6 PocketMobile
- 6.5 UK and Ireland
- 6.5.1 Aeromark
- 6.5.2 Blue Tree Systems
- 6.5.3 Celtrak
- 6.5.4 FleetMatics
- 6.5.5 GreenRoad
- 6.5.6 Isotrak
- 6.5.7 Lysanda
- 6.5.8 Matrix Telematics
- 6.5.9 Microlise
- 6.5.10 Quartix
- 6.5.11 TRACKER Network
- 6.5.12 Trakm8
- 6.5.13 Transpoco
- 6.5.14 Webtech Wireless

Glossary

About the Authors



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.

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. From time to time we also perform custom research assignments. 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.

Related products

- Fleet Management in the Americas
- Car Telematics and Wireless M2M
- Security Applications and Wireless M2M
- The Global Wireless M2M Market

Order form – TO RECEIVE YOUR COPY OF FLEET MANAGEMENT IN EUROPE

You can place your order in the following alternative ways:

1. Place your order online in our web shop at www.berginsight.com
2. Fax this order sheet to us at fax number: +46 31 711 30 96
3. Mail this order sheet to us at: Berg Insight AB, Viktoriagatan 3, 411 25 Gothenburg, Sweden
4. Email your order to: info@berginsight.com
5. Phone us at +46 31 711 30 91

Choose type of format

- Paper copy 1000 EUR
 PDF 1-5 user license 1500 EUR
 PDF corporate license..... 3000 EUR

Family/Surname	Forename	Position	Company
Address		Country	Postcode
Telephone	FAX	Email	

VAT is chargeable on all orders from Sweden. Orders from all other countries in the European Union must include the buyer's VAT Registration number below in order to avoid the addition of VAT.

Your PO number	Your VAT/TVA/IVA/BTW/MWST number
----------------	----------------------------------

Please charge my credit card

- VISA Mastercard

Card number	Expiry date (MM/YY)	CV code
Cardholder's name	Signature	
Billing address		
Postcode	Country	

- We enclose our cheque payable to Berg Insight AB
 Please invoice me

Signature	Date
-----------	------

Reports will be dispatched once full payment has been received. For any enquiries regarding this, please contact us. Payment may be made by credit card, cheque made payable to Berg Insight AB, Viktoriagatan 3, 411 25 Gothenburg, Sweden or by direct bank transfer to Skandinaviska Enskilda Banken, 106 40 Stockholm, Sweden.

Account Holder: Berg Insight AB
 Account number: 5011 10 402 80
 BIC/SWIFT: ESSESESS
 IBAN: SE92 5000 0000 0501 1104 0280

