M2M Research Series

Fleet Management in Europe

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BERG INSIGHT

The consolidation trend continues in the fleet management market

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.

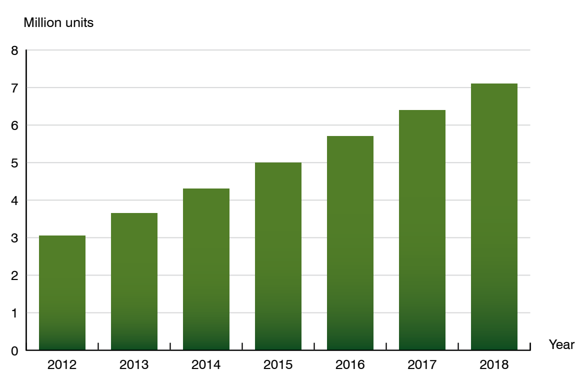
Commercial vehicle fleets play an essential role in the European economy. According to official statistics there were 36.1 million commercial vehicles in use in EU23+2 in 2011. The 5.9 million medium and heavy trucks accounted for more than 75 percent of all inland transports, forming a € 250 billion 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 14.2 percent from 3.65 million units at the end of 2013 to 7.10 million by 2018. The penetration rate in the total population of non-privately owned commercial vehicles is estimated to increase from 12.4 percent in 2013 to 22.9 percent in 2018.

A group of international aftermarket solution providers have emerged as the leaders on the European fleet management market. Masternaut reported an active installed base of close to 350,000 units in July 2014, mainly in France and the UK. TomTom Telematics was the fastest growing vendor also in 2014 and has now surpassed 400,000 subscribers in August 2014. This means that the two companies today share the number one spot in terms of installed base in Europe. Transics is ranked as the largest player in the heavy trucks segment with an estimated 85,000 active units installed. Other significant players include European companies such as Trakm8, Quartix, TRACKER, Vehco and Microlise and international players like Trimble, Navman Wireless and Teletrac 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 and 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 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 Europe. MAN TeleMatics is since July 2012 standard on the new truck model TGX EfficientLine including a 4-month trial for the service.

A second wave of M&A activities continued into 2014. At the beginning of 2014, Qualcomm finally divested also the majority of the European arm of its fleet business to Astrata Group. Later in February, WABCO acquired Transics and the transaction valued the company at about € 100 million. Lysanda acquired UK-based TRACKER Network in February. In April, TomTom also acquired the French FM provider DAMS Tracking, adding another 27,000 subscriptions to its installed base. Francisco Partners moreover divested Masternaut to Summit Partners (majority ownership) and FleetCor in the same month. In July 2014, Zucchetti Group acquired a majority share (51 percent) of Macnil from its founders. The latest transaction was done in October 2014 when Finder acquired its Polish competitor Autoguard to form the largest FMS provider in Poland.



Installed base of active fleet management units (EU27+2 2012–2018)

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 2014/2015?
- 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 markets, with a special focus on fleet management and car telematics.

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