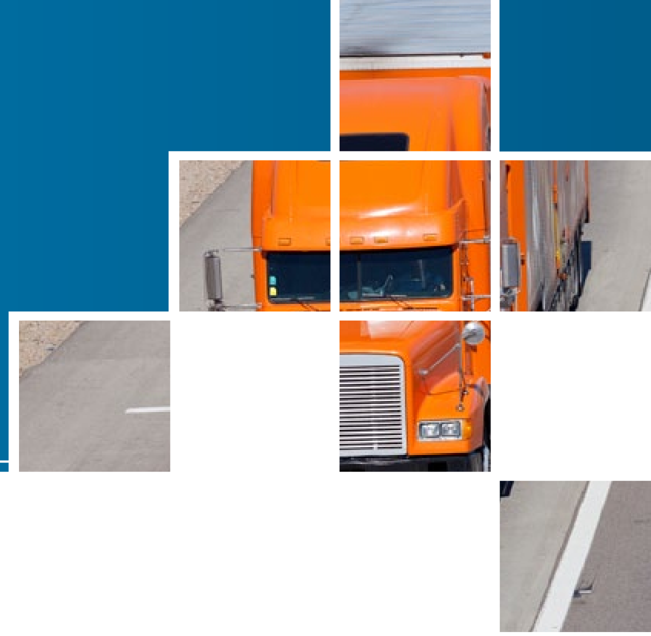
M2M Research Series

# Fleet Management in the Americas



**Fleet Management in the Americas** is the fourth consecutive report from Berg Insight analysing the latest developments on the fleet management market in the Americas.

This strategic research report from Berg Insight provides you with 210 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 this report:*

- **Insights** from 40 new executive interviews with market leading companies.
- **New data** on vehicle populations and commercial fleets in the Americas.
- **Comprehensive overview** of the fleet management value chain and key applications.
- **In-depth analysis** of market trends and key developments.
- **Updated profiles** of 74 aftermarket fleet management solution providers.
- **Summary** of OEM propositions from commercial vehicle brands.
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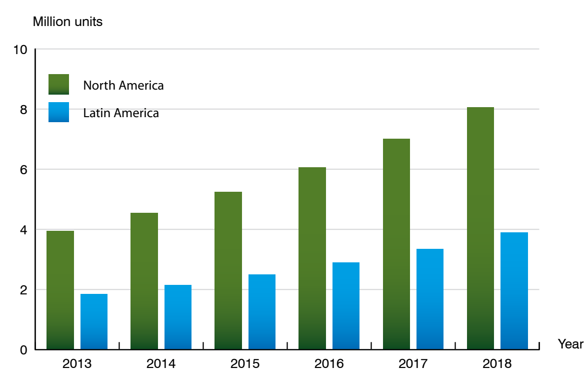
## How will the fleet management market develop in the Americas?

Fleet management (FM) 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 in many regions 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 economy both in North and Latin America. In North America, there are approximately 13.3 million GVW 3–8 commercial vehicles in use. Around 18 million lighter vehicles including GVW 1–2 vehicles and cars with no GVW are also owned by enterprises or public entities. In Latin America, the number of commercial vehicles in operation is estimated to 24.3 million, out of which 5.5 million are heavy trucks and 18.8 million are light commercial vehicles. Berg Insight is of the opinion that the market for fleet management in the Americas is in a growth period which will continue in the years to come. The advanced North American market will remain on a growth track, not the least driven by regulatory developments such as CSA and the forthcoming ELD/EOBR mandate. Latin America has traditionally presented a very different scenario, often requiring an educational process in order to extend the perception of fleet management beyond security-related aspects. The Latin American fleet owners have however also started to embrace functionality for optimisation of fleet operations to an increasing extent.

Berg Insight expects the FM market to continue to show healthy growth in 2014–2018. In North America, the number of systems in active use is forecasted to grow at a compound annual growth rate (CAGR) of 15.3 percent from 4.0 million units in 2013 to 8.1 million units by 2018. The penetration rate in the total population of non-privately owned commercial vehicles is estimated to increase from 13.9 percent in 2013 to 25.7 percent in 2018. In Latin America, the number of systems in use is projected to increase from 1.9 million units in 2013, growing at a CAGR of 16.1 percent to reach 3.9 million units in 2018. The penetration rate in the region is estimated to increase from 8.0 percent in 2013 to 15.3 percent in 2018.




*Installed base of active fleet management units (Americas 2013–2018)*

The leading FM providers in the Americas include a range of different actors. Fleetmatics is ranked as the largest player with an estimated installed base of 400,000 active units mainly in North America. Key market segments include field service and local delivery. Trimble holds the second place and has reached a total installed base of over 350,000 active units in North America following the acquisition of PeopleNet. Trimble now has a strong presence in both field service management and transportation & logistics. Key competitors in the heavy truck segment include Omnitracs which has acquired XRS in 2014. Zonar Systems is also a strong player in this field. Other actors focusing on service fleets include Verizon Networkfleet and NexTraq. Several players also have a broader market scope, covering both light and heavy vehicles. Examples include Telogis, Teletrac, Geotab, Webtech Wireless and CalAmp. Major Brazilian providers include Sascar, Autotrac, Zatix and OnixSat, each having estimated installed bases in the range of 70,000–190,000 units. Other notable actors in Latin America include Copiloto Satelital, Global Track, Grupo UDA and Encontrack in Mexico, Tastets System and Wisetrack in Chile, Hawk GPS in Argentina and Satrack in Colombia.

Most commercial vehicle manufacturers active in the Americas today offer OEM telematics. Examples in North America include Daimler's Virtual Technician, Volvo Link, Ford Crew Chief, Hino Insight and GM's recent OnStar initiative for fleets. OEM systems offered in Latin America moreover include Daimler's FleetBoard, Volvo's Dynafleet, Scania Fleet Management, Iveco Frota Fácil, Ford's Fordtrac and Volksnet from MAN Latin America. The OEM-provided systems are either developed in-house or powered by telematics partners. A trend among the OEMs is to increasingly rely on aftermarket solution partners and additional collaborations are expected in 2015. The comparably low adoption of OEM systems in the Americas so far has now started to take off and strong growth is anticipated in this segment.

### This report answers the following questions:

- Will the FM industry consolidate further during 2014–2015?
- What is the geographical structure of commercial vehicle fleets in the Americas?
- Who are the leading international and regional providers of aftermarket fleet management solutions in the Americas?
- What offerings are available from commercial vehicle OEMs?
- How is the shift towards standard hardware affecting the market for fleet management solutions in the Americas?
- How are the regulatory developments in the Americas affecting the fleet management industry?
- What differences are there between the North and Latin American markets?
- How will the commercial vehicle telematics industry evolve in the future?

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# About the Authors

**Rickard Andersson** is a Senior Analyst with a Master's degree in Industrial Engineering and Management from Chalmers University of Technology. He joined Berg Insight in 2010 and his areas of expertise include location-based services, fleet management and mobile VAS.

**Johan Fagerberg** is co-founder and an experienced analyst with a Master's degree in Electrical Engineering. His areas of expertise include fleet management, car telematics and wireless M2M markets.

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## Who should buy this report?

**Fleet Management in the Americas** is the foremost source of information about the Commercial Vehicle Telematics and Fleet Management market. 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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