

Fleet Management in the Americas

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

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- **Comprehensive** overview of the fleet management value chain and key applications.
- **In-depth** analysis of market trends and key developments.
- **Updated** profiles of 76 aftermarket fleet management solution providers.
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The top-5 FM providers in the Americas together have 2.5 million active units

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.

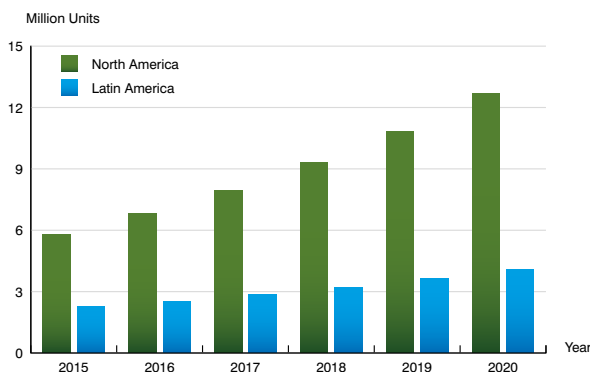
Commercial vehicle fleets play an essential role in the economy in both North and Latin America. In North America, there are approximately 13.7 million GVW 3–8 commercial vehicles in use. Around 18 million lighter vehicles including GVW 1–2 vehicles and cars with no GVW are also owned by enterprises or public entities. In Latin America, the number of commercial vehicles in operation is estimated to 26.7 million, out of which 5.9 million are heavy trucks and 20.8 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 the ELD 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. Regulatory developments in the region are expected to influence the uptake of fleet management solutions positively by increasing the general awareness of telematics applications.

Berg Insight expects the FM market to continue to show healthy growth in 2016–2020. In North America, the number of systems in active use is forecasted to grow at a compound annual growth rate (CAGR) of 17.0 percent from 5.8 million units in 2015 to 12.7 million units by 2020. The penetration rate in the total population of non-privately owned

commercial vehicles is estimated to increase from 19.8 percent in 2015 to 39.2 percent in 2020. In Latin America, the number of systems in use is projected to increase from 2.3 million units in 2015, growing at a CAGR of 12.8 percent to reach 4.1 million units in 2020. The penetration rate in the region is estimated to increase from 8.9 percent in 2015 to 14.7 percent in 2020.

The leading FM providers in the Americas include a range of different actors. Some serve the heavy truck segment while others focus on service fleets. Many players also have a broad market scope. Berg Insight ranks Fleetmatics as the largest vendor in the Americas at the end of 2015 with over 600,000 active units in the region. The runner-up is Omnitrac which has surpassed 500,000 units. Telogis – acquired by Verizon in 2016 – was in third place with around 450,000 units in the Americas. Trimble and Geotab have also surpassed the milestone of 400,000 units in the region. Players with installed bases of 200,000–400,000 units include Zonar Systems, Verizon Networkfleet, Teletac Navman and Sascar. Further top players with more than 100,000 units are Position Logic, Spireon, BSM Technologies, NexTraq and Fleet Complete. Notable vendors also include Autotrac, Pósitron and OMNILINK in Brazil, GPS Insight, CalAmp and Synovia Solutions in the US, and WideTech in Colombia. Additional actors in Latin America are OnixSat in Brazil, Encontract, Copiloto Satelital, Grupo UDA and Global Track in Mexico, Satrack in Colombia, Redd System, Wisetrack and GPS Chile in Chile, Hawk GPS in Argentina and Location World in Ecuador.

Most vehicle manufacturers now offer factory-installed fleet telematics solutions either independently or through partnerships. Examples of OEMs which have introduced systems in the Americas include Daimler, Volvo, Paccar, Navistar, Ford, GM, Hino, Isuzu, MAN, Scania and Iveco. The OEM telematics initiatives in the Americas have intensified substantially in recent years. Large installed bases are now found on the North American market, not the least for systems powered by established aftermarket fleet management solution providers. The volumes are so far generally small in Latin America. The adoption is however expected to take off also in this region. Solutions supplied by the OEMs are anticipated to increase in importance across both continents in the Americas in the coming years.



Installed base of active fleet management units (Americas 2015–2020)

This report answers the following questions:

- Will the FM industry consolidate further during 2016–2017?
- 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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