Fleet Management in the Americas

Fleet Management in the Americas is the eighth consecutive report from Berg Insight analysing the latest developments on the commercial vehicle telematics market in the Americas.

This strategic research report from Berg Insight provides you with 300 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 30 new executive interviews with market leading companies.
- **New data** on vehicle populations and commercial fleets in Americas.
- **Comprehensive overview** of the fleet management value chain and key applications.
- **In-depth analysis** of market trends and key developments.
- **Updated profiles** of 75 aftermarket fleet management solution providers.
- **Summary** of OEM propositions from commercial vehicle brands.
- **Revised** market forecasts lasting until 2022.

Berg Insight’s M2M Research Series

What are the key business opportunities in the emerging wireless M2M/IoT market? Berg Insight’s M2M Research Series is a unique series of 35 market reports published on a regular basis. Each title offers detailed analysis of a specific vertical application area such as smart metering, fleet management or car telematics. Once per year we also publish summaries of our research with detailed forecasts for the Global and European wireless M2M markets respectively.

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Million units
10
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52
21
2
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22

Owned commercial vehicles is estimated to increase from 26.6 percent in 2022. The penetration rate in the total population of non-privately owned commercial vehicles is projected to increase from 3.0 million units in 2017, growing at a CAGR of 13.1 percent to reach 5.5 million units in 2022. The penetration rate in the region is estimated to increase from 11.2 percent in 2017 to 19.7 percent in 2022.

Verizon Connect is the clear leader in the fleet telematics space both from a global perspective and in the Americas specifically. The closest competitor in the Americas is Geotab which has grown considerably in the past year, followed by Omnitracs and Trimble which have both surpassed 0.5 million active fleet management subscribers in the region. Zonar Systems rounds off the top-5, just ahead of Michelin which has established a strong position in the Americas through multiple acquisitions. Additional top players with installed bases in the range of 0.2–0.3 million active units in the Americas include Teletrac Navman, KORE Position Logic and Fleet Complete. A total of 15 players had installed bases exceeding 0.1 million active units in the Americas at the end of 2017, including also Gurtam, Synovia Solutions, BSM Technologies, GPS Insight, WideTech and Pòsitron. The remaining top-25 vendors are J.J. Keller, Spireon, Autotrac, Azuga, ORBCOMM, Pointer Telocation, Agilis Systems, OnixSat, CalAmp and Encontrack. Fleet management solution providers with installed bases just outside of the top list moreover include MiX Telematics, TomTom Telematics, OMNILINK, Ituran, Centro de Soluciones Inalámbricas (CSI) and Satrack.

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, Scania, MAN, Iveco, PACCAR, Navistar, Ford, GM, Hino, Isuzu, FUSO and Ram. The OEM telematics initiatives in the Americas have intensified in recent years. Large installed bases of OEM telematics systems are now found on the North American market, in many cases powered by established aftermarket fleet management solution providers. Notable telematics players actively supporting OEMs include Verizon Connect, Zonar Systems and PeopleNet. The volumes of OEM telematics systems are so far substantially smaller 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.

This report answers the following questions:

- Will the FM industry consolidate further in 2018 and beyond?
- What is the geographical structure of commercial vehicle fleets in the Americas?
- Which 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?
- 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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Glossary
### 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.

### Related products

- Fleet Management in Europe
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