

# Fleet Management in Australia and New Zealand

**Fleet Management in Australia and New Zealand** is a comprehensive 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 90 pages of unique business intelligence including 5-year industry forecasts and expert commentary on which to base your business decisions.

## Highlights from this report:

- ◆ **Insights** from numerous interviews with market-leading companies.
- ◆ **New data** on vehicle populations and commercial fleets in Australia and New Zealand.
- ◆ **Comprehensive overview** of the fleet management value chain and key applications.
- ◆ **In-depth analysis** of market trends and key developments.
- ◆ **Updated profiles** of 28 aftermarket fleet management solution providers.
- ◆ **Summary** of OEM propositions from commercial vehicle brands.
- ◆ **Market forecasts** lasting until 2020.

## The installed base of FM systems in Australia & New Zealand will reach 1.1 million units by 2020

Berg Insight is of the opinion that the market for fleet management (FM) in Australia and New Zealand is in a growth period which will continue in the years to come. The number of FM systems in active use is forecasted to grow at a compound annual growth rate (CAGR) of 16.0 percent from 0.5 million units in 2015 to 1.1 million by 2020. The penetration rate in the total population of non-privately owned fleet vehicles used by businesses is at the same time estimated to increase from 11.7 percent in 2015 to 22.3 percent in 2020. The fleet management market in the region is today influenced positively by a number of different market drivers including regulatory developments such as health and safety regulations, road user charges and electronic work diaries.

A large number of diverse vendors are active on the fragmented fleet telematics market in Australia and New Zealand, including several of the leading international players as well as a plethora of small- and medium-sized companies mainly focused on this region. Berg Insight ranks Teletrac Navman as the largest provider of fleet management solutions in Australia and New Zealand with around 80,000 active units in the region, holding a strong position in both countries. The runner-up is New Zealand-based EROAD which is

active on the domestic market as well as in Australia. Additional top-5 players with estimated installed bases of over 20,000 active FM units in the region include IntelliTrac and MTDData headquartered in Australia and Smartrak which is based in New Zealand. Other notable providers include the local suppliers Ezy2c and Coretex as well as international players including MiX Telematics, Ctrack and Geotab. The latter works with the local partner Securatrak. The major international FM providers TomTom Telematics and Fleetmatics have also expanded to this region. Additional examples of local aftermarket players with comparably sizeable subscriber bases include GPSengine, Procon Telematics, Pinpoint Communications (Altech Netstar) and Myionu. Commercial vehicle OEMs such as Isuzu, Volvo Group, Scania and PACCAR have moreover introduced fleet telematics solutions in the region independently or through partnerships, though the adoption levels generally remain relatively modest so far.

### Berg Insight's M2M Research Series

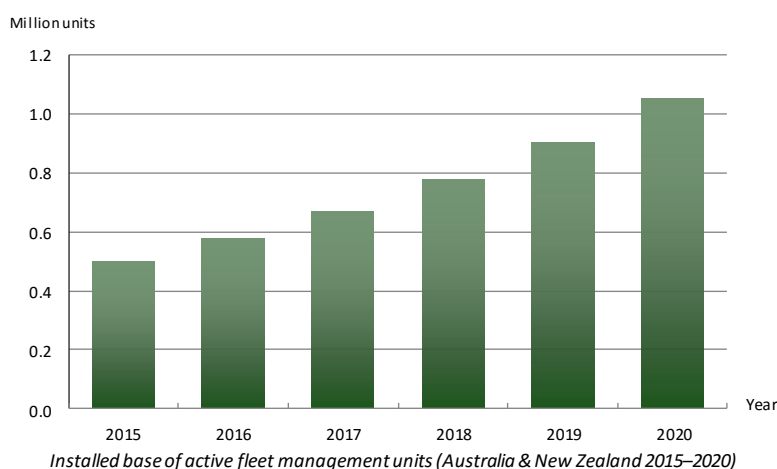
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## This report answers the following questions:

- ◆ How does the fleet management market in Australia and New Zealand compare with other markets?
- ◆ What is the price level of fleet telematics solutions in the region?
- ◆ Which are the leading local providers of aftermarket fleet management solutions?
- ◆ Which international fleet management providers are targeting Australia and New Zealand?
- ◆ What hurdles are there for foreign players?
- ◆ What offerings are available from commercial vehicle OEMs?
- ◆ Will the FM industry consolidate further during 2016–2017?
- ◆ How will the commercial vehicle telematics industry evolve in the future?



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### Who should buy this report?

Fleet Management in Australia and New Zealand 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.

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