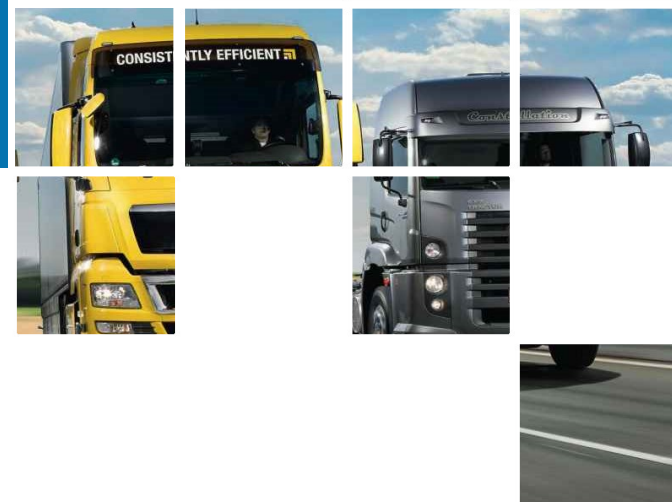


# Fleet Management in South Africa



**Fleet Management in South Africa** is a comprehensive report from Berg Insight analysing the latest developments on the South African fleet management market.

This strategic research report from Berg Insight provides you with 75 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 South Africa.
- ◆ **Comprehensive overview** of the fleet management value chain and key applications.
- ◆ **In-depth analysis** of market trends and key developments.
- ◆ **Updated profiles** of 22 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 South Africa will reach 1.5 million units by 2020

Berg Insight is of the opinion that the market for fleet management (FM) in South Africa 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 10.8 percent from 0.9 million units in 2015 to 1.5 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 21.5 percent in 2015 to 32.5 percent in 2020. South Africa is a relatively mature telematics market and the penetration is comparably high from an international perspective. Far from all deployments are however full-scale advanced FM solutions. A notable share of the installed fleet telematics systems on the South African market is represented by comparably low-end tracking systems, e.g. light FM solutions, including SVR systems extended with basic FM features.

The South African fleet management market is dominated by five players with broad telematics portfolios which are all headquartered in the country and have installed bases of more than 100,000 FM units. Berg Insight ranks MiX Telematics as the largest provider of fleet management solutions in South Africa with an estimated

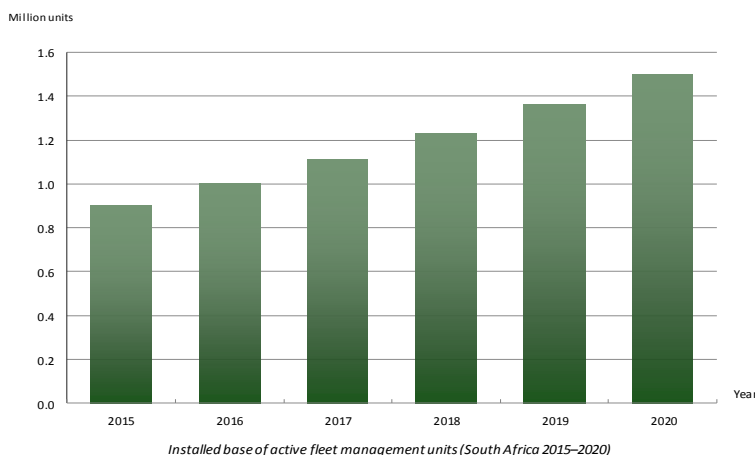
installed base of around 150,000 active units in the country. The runner-up is Cartrack followed by Altech Netstar and DigiCore (Ctrack). Tracker has also provided more than 100,000 active FM systems in the country, out of which a share is represented by solutions powered by TomTom Telematics. Other renowned international providers active on the market include Pointer Telocation and Geotab. Foreign telematics players have however generally not managed to achieve any significant market shares on the South African fleet management market so far. Additional examples of domestic aftermarket players include GPS Tracking Solutions (Eqstra Fleet Management), Global Telematics (Pointer SA), Autotrak, ACM Track and Digit Vehicle Tracking. Commercial vehicle OEMs including Daimler, Scania, Volvo Group and MAN have moreover introduced fleet telematics solutions in South Africa, though the adoption levels generally remain relatively modest so far.

### 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 25 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 vehicle telematics. Once per year we also publish summaries of our research with detailed forecasts for the Global and European wireless M2M markets, respectively.

## This report answers the following questions:

- ◆ How does the fleet management market in South Africa compare with other markets?
- ◆ What is the price level of South African fleet telematics solutions?
- ◆ Which are the leading domestic providers of aftermarket fleet management solutions?
- ◆ Which international fleet management providers are targeting the South African market?
- ◆ 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 South Africa 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.

### Related products

Fleet Management in the Americas  
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