

Fleet Management in South Africa

Fleet Management in South Africa is the fourth consecutive report from Berg Insight analysing the latest developments on the South African fleet management market. The report also includes an outlook on the rest of the African market beyond South Africa.

This strategic research report from Berg Insight provides you with 115 pages of unique business intelligence including 5-year industry forecasts and expert commentary on which to base your business decisions.

Highlights from the fourth edition of the report:

- ◆ **Insights** from numerous interviews with market-leading companies.
- ◆ **New data** on vehicle populations and commercial fleets in South Africa and other African countries.
- ◆ **Comprehensive overview** of the fleet management value chain and key applications.
- ◆ **In-depth analysis** of market trends and key developments.
- ◆ **Updated profiles** of 24 aftermarket fleet management solution providers.
- ◆ **Summary** of OEM propositions from commercial vehicle brands.
- ◆ **Market forecasts** lasting until 2023.
- ◆ **Outlook** on the African fleet management market beyond South Africa.

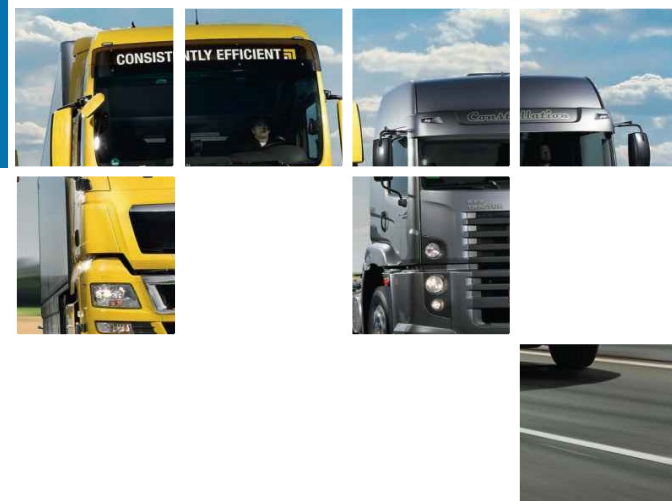
The installed base of FM systems in South Africa will reach 3.2 million units by 2023

Berg Insight is of the opinion that the market for fleet management 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 15.0 percent from 1.6 million units at the end of 2018 to 3.2 million by 2023. 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 34.6 percent in 2018 to 63.1 percent in 2023. 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 clearly dominated by five domestic players with broad telematics portfolios and more than 100,000 fleet management units in use in this market. Berg Insight ranks Cartrack and MiX Telematics as the largest providers of fleet management solutions in South Africa, together having more than 0.5 million active units in the country. Tracker is the third largest player followed by Netstar and Ctrack (Inseego). Other top-10

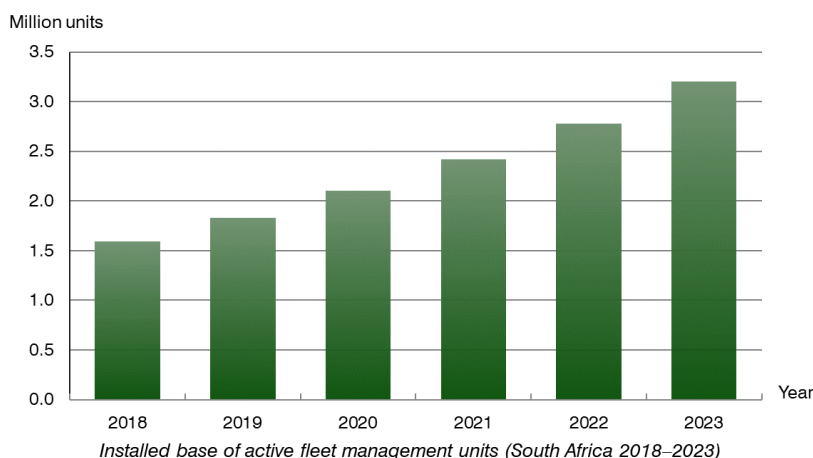
players on the South African fleet management market include local providers such as Bidtrack (Bidvest Group), Digit Vehicle Tracking (Digicell) and GPS Tracking Solutions (Eqstra Fleet Management), as well as international players including Webfleet Solutions (Bridgestone) and Gurtam, all having estimated installed bases of at least 30,000 fleet management units in the country. Bidtrack's owner Bidvest is notably in the process of acquiring Eqstra Fleet Management including GPS Tracking Solutions. Players just outside of the top list include Autotrak, Digital Matter, Pointer Telocation (PowerFleet), ACM Track, PFK Electronics, Geotab and Key Telematics. International commercial vehicle OEMs including Scania, Daimler, MAN and Volvo Group have further all introduced fleet telematics solutions in South Africa.

The report also includes an outlook on the overall African market. Africa is clearly a highly diverse geographic region from a fleet management perspective. The continent can in general be divided into three subregions – South Africa, Sub-Saharan Africa (excluding South Africa) and Northern Africa. South Africa is in general well ahead of the rest of the continent in terms of adoption.



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?
- ◆ What challenges and opportunities are there in the rest of Africa?
- ◆ Will the FM industry consolidate further during 2020–2021?
- ◆ 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.

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