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BERG INSIGHT

Steady growth in the FM market and a second wave of market consolidation in progress

Fleet management 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 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.

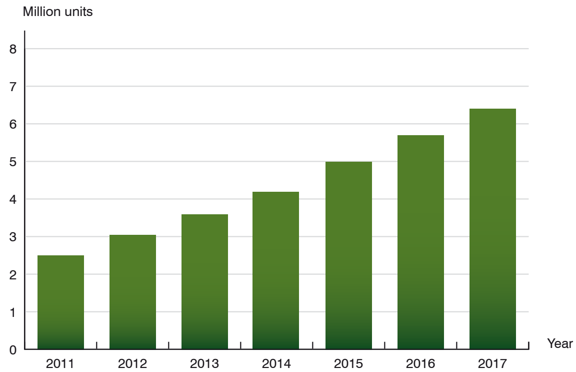
Commercial vehicle fleets play an essential role in the European economy. According to official statistics there were 35.7 million commercial vehicles in use in EU23+2 in 2010. The 5.9 million medium and heavy trucks accounted for more than 75 percent of all inland transports, forming a € 250 billion industry. Approximately 0.8 million buses and coaches stood for 9.3 percent of all passenger kilometres. Last but not least, the greater part of the 29.1 million light commercial vehicles (LCV) in Europe was used by mobile workers and for activities such as distribution of goods and parcels.

Berg Insight is of the opinion that the European fleet management market has entered a growth period that will last for several years to come. Individual markets may however suffer temporary setbacks, depending on the local economic developments. The number of fleet management systems in active use is forecasted to grow at a compound annual growth rate of 16.0 percent from 3.05 million units at the end of 2012 to 6.40 million by 2017. The penetration rate in the total population of non-privately owned commercial vehicles is estimated to increase from 10.6 percent in 2012 to 21.1 percent in 2017.

A group of international aftermarket solution providers have emerged as the leaders on the European fleet management market. Masternaut is ranked as the largest player overall in terms of installed base with close to 287,000 units deployed in September 2013, mainly in France and the UK. TomTom Business Solutions was the fastest growing vendor also in 2012 and has now surpassed 300,000 subscribers. Transics is number one in the heavy trucks segment with an estimated 80,000 active units installed. Other significant players include European companies such as Vehco, Navman Wireless, TRACKER and Trafficmaster and international players like Trimble and Omnitracs (Qualcomm) from the US and the South African telematics providers DigiCore and MiX Telematics.

All major truck manufacturers on the European market offer OEM telematics solutions as a part of their product portfolio. Mercedes-Benz, Volvo and Scania launched their first products in the 1990s and followed by MAN in 2000, Renault Trucks in 2004, DAF Trucks in 2006 and Iveco in 2008. The products are all supporting the FMS standard and can generally be deployed in mixed fleets even if some functionality can be brand-specific. A major trend in the past two years has been the announcements of standard line fitment of fleet management solutions. Since the end of 2011, Scania is rolling out the Scania Communicator as standard on all European markets and includes a four year basic service subscription. The new generation of the Actros trucks from Mercedes-Benz contains the FleetBoard vehicle computer as standard in all EU27 countries since October 2011. Volvo is going in the same direction offering Dynafleet as standard in Europe. MAN TeleMatics is since July 2012 standard on the new truck model TGX EfficientLine including a 4-month trial for the service.

A second wave of M&A activities started in 2013. Danaher Corporation acquired Navman Wireless and Trafficmaster from Prairie Capital and Vector Capital respectively. TomTom made its second acquision in the fleet management space when picking up Coordina headquartered in Spain. The acquisition adds 27,000 fleet management subscriptions primarily in Spain. Qualcomm also announced the divestment of the Omnitracs operations in the US, Canada and South America to Vista Equity Partners in August 2013. The European arm of the business is surprisingly still part of Qualcomm. Lyceum Capital acquired Isotrak from Saints Chamonix Private Equity in the same month. The latest transaction was done in September 2013 when Oskando and Autolog merged and at the same time launched the new brand EcoFleet.



Installed base of active fleet management units (EU27+2, 2011–2017)

This report answers the following questions:

- Is the European fleet management market back on a growth track?
- Will the FM industry consolidate further during 2013 and 2014?
- What is the geographical and ownership structure of commercial vehicle fleets in Europe?
- Who are the leading international and regional providers of aftermarket fleet management solutions in Europe?
- What offerings are available from truck, trailer and construction equipment OEMs?
- How will the regulatory developments in the Americas affect the fleet management industry?
- What impact will the launch of standard factory installed FM systems from the OEMs have on the market?
- How will the commercial vehicle telematics industry evolve in the future?

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Glossary

About the Author

Johan Fagerberg is co-founder and an experienced analyst with a Masters degree in Electrical Engineering from Chalmers University of Technology. His areas of expertise include location-based services and wireless M2M markets, with a special focus on fleet management and car telematics.

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