

Fleet Management in the Americas

Fleet Management in the Americas is a comprehensive report from Berg Insight analysing the latest developments on the fleet management market in the Americas.

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- **Insights** from 30 new executive interviews with market leading companies.
- **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 50+ aftermarket fleet management solution providers.
- **Summary** of OEM propositions from truck and construction equipment brands.
- **Market forecasts** lasting until 2015.

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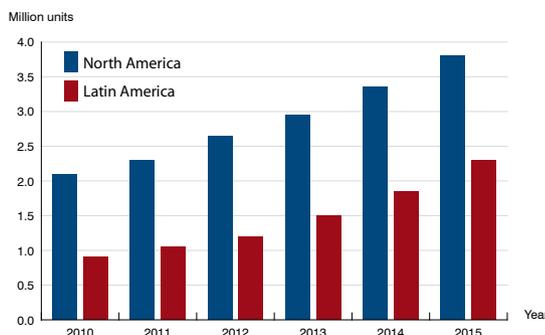


Fleet management shipments in the Americas to be boosted by regulatory developments

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 in many regions 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 economy both in North and Latin America. In North America, there are approximately 12.9 million GVW 3–8 commercial vehicles in use. In Latin America, the number of commercial vehicles in operation is estimated to 19.9 million, out of which 5.5 million are heavy trucks and 14.4 million are light commercial vehicles. Berg Insight is of the opinion that the market for fleet management in the Americas is in a growth period which was temporarily slowed down by the financial downturn but will continue in the years to come. The advanced North American market will remain on a growth track, not the least driven by regulatory developments such as CSA and HOS revisions. Latin America is coming from a lower degree of maturity in the utilisation of fleet management solutions and will also experience an increase in adoption. In many cases, an educational process may however be needed in order to increase the awareness among prospective users about the potential that fleet management solutions have beyond mere security related features.

Berg Insight expects that the market for fleet management will continue to show healthy growth in 2011. In the North American market, the number of fleet management systems in active use is forecasted to grow at a compound annual growth rate (CAGR) of 12.6 percent from 2.1 million units in 2010 to 3.8 million units by 2015. The penetration rate in the total population of non-privately owned commercial vehicles is estimated to increase from 16.3 percent to 29.5 percent ►



Installed base of fleet management units (Americas 2010–2015)

► in 2015. In Latin America, the number of fleet management systems in use is projected to increase from 0.9 million units in 2010, growing at a CAGR of 20.6 percent to reach 2.3 million units in 2015. The penetration rate among non-privately owned commercial vehicles in the region is estimated to increase from 4.5 percent in 2010 to 11.6 percent in 2015.

The market leaders on the fleet management market in the Americas include a range of different actors. Qualcomm Enterprise Services is ranked as the largest player, with an estimated total installed base of approximately 350,000 units in North and Latin America. The company's solutions are targeted at heavy trucks, where the main competitors in North America are XATA and PeopleNet, with approximately 110,000 units installed each. Actors with substantial business within service fleets include FleetMatics, Networkfleet and Wireless Matrix. Other actors often have a broader market scope, covering both light and heavy vehicles. Examples include Telogis, Trafficmaster/Teletrac, WebTech Wireless and Trimble. Major Brazilian providers include Autotrac, Zatix and OnixSat, each having estimated installed bases in the range of 50,000–85,000 units. Other notable actors in Latin America include Copiloto Satelital in Mexico, Satrack in Colombia and Tastets System in Chile, each holding important positions in their respective countries.

A number of manufacturers of commercial vehicles active in the Americas offer OEM telematics solutions as part of their product portfolio. Volvo Link has been on the market since 2002, while Ford's Crew Chief was launched in 2009, the same year as Daimler's FleetBoard system was released on the Brazilian market. Hino Insight was announced in 2011, as was the Daimler brand Freightliner's factory-installation of telematics hardware from Telogis. MAN Latin America offers the VOLK-SNET solution in collaboration with a Brazilian aftermarket provider, while IVECO has developed a fleet management solution especially for the Latin American market. Fleet management solutions from OEMs have not been particularly successful in the Americas, but are expected to increase in importance in the coming years.

This report answers the following questions:

- How has the economic crisis affected the market for fleet management solutions in the Americas?
- Will the FM industry consolidate further during 2011?
- What is the geographical structure of commercial vehicle fleets in the Americas?
- Who are the leading international and regional providers of aftermarket fleet management solutions in the Americas?
- What offerings are available from truck and construction equipment OEMs?
- How will the regulatory developments in the Americas affect 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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