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Fleet Management Market by Component (Services, Solutions (Operation Management, Vehicle Maintenance & Diagnostics, Performance Management)), Fleet Type (Commercial Fleets, Passenger Vehicles), Vertical and Region - Global Forecast to 2028

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Abstracts

The fleet management market is estimated at USD 28.6 billion in 2023 to USD 55.6 billion by 2028, at a Compound Annual Growth Rate (CAGR) of 14.2%. The incorporation of telematics data into insurance processes serves as a fundamental catalyst for the expansion of the fleet management market. By seamlessly incorporating real-time information on vehicle location, driver behavior, and overall performance into insurance models, companies can develop usage-based insurance (UBI) models. This strategic integration provides a strong incentive for fleet operators to embrace comprehensive fleet management solutions. The potential for reduced insurance premiums, determined by actual driving behavior and specific risk factors rather than generic metrics, serves as a compelling motivator. As businesses seek to optimize costs and improve operational efficiency, the promise of lower insurance expenses through UBI models encourages widespread adoption of advanced fleet management solutions, contributing to the market's overall growth.

“The commercial fleet segment is expected to hold the largest market size during the forecast period.” City buses, motor coaches, ambulances, and long-haul delivery trucks are all part of the diversified commercial vehicle sector landscape, which includes both Light Commercial Vehicles (LCVs) and Medium and Heavy Commercial Vehicles (M&HCVs). By offering real-time vehicle monitoring and data transfer, fleet management solutions are crucial in managing large commercial fleets, guaranteeing

quicker response times and on-time deliveries. These systems combine driver assistance technology with GPS tracking for increased safety, effective navigation, and regulatory compliance monitoring. Fleet management systems support the transition to environmentally friendly transportation by enabling the integration of hybrid and electric cars in line with sustainability objectives.

“The services segment to register the fastest growth rate during the forecast period.” Fleet management services offer a comprehensive suite of solutions, encompassing managed services alongside specialized expertise such as implementation, support, and maintenance. In response to the escalating data security concerns, the demand for support and maintenance services has surged. These services play a pivotal role in fortifying the robustness of fleet management systems, addressing the pressing need to shield sensitive information from potential threats. As the digital landscape evolves, businesses recognize the critical importance of maintaining the integrity and security of their fleet data. Support and maintenance services ensure these systems' continuous functionality and act as a proactive defense mechanism, mitigating risks and safeguarding against potential cybersecurity challenges. This heightened focus on data security underscores the evolving nature of fleet management services, where comprehensive solutions are tailored to meet the dual objectives of efficiency and cybersecurity resilience.

“Asia Pacific's highest growth rate during the forecast period.”

In the Asia Pacific region, the exponential growth of online shopping and e-commerce platforms has generated a demand for efficient delivery services, underscoring the significance of fleet management solutions in optimizing logistics and transportation. The region's strategic investments in infrastructure, encompassing road networks and smart transportation systems, catalyze the widespread adoption of fleet management technologies. This development not only enhances overall connectivity but also contributes to meticulous logistics planning. Furthermore, the burgeoning middle class and escalating disposable income have fueled a notable increase in vehicle ownership. This surge, both in commercial and personal vehicles, presents a compelling opportunity for expanding fleet management solutions, as businesses and individuals alike seek streamlined and effective means to manage and optimize their growing fleets in the dynamic Asia Pacific market.

In-depth interviews have been conducted with chief executive officers (CEOs), Directors, and other executives from various key organizations operating in the fleet management market.

By Company Type: Tier 1 – 35%, Tier 2 – 45%, and Tier 3 – 20%

By Designation: C-level –35%, D-level – 25%, and Others – 40%

By Region: North America – 30%, Europe – 30%, Asia Pacific – 25%, Latin America- 5%, and Middle East & Africa – 10%,

The major players in the fleet management market are Geotab (Canada), Verizon Connect (US), Bridgestone Group (Japan), Trimble (US), Samsara (US), Wheels (US), Inseego (US), Solera Group (US), Verra Mobility (US), Teletrac Navman (US), Holman (US), Orbcomm (US), Mix Telematics (South Africa), Zebra Technologies (US), Motive (US), Chevin (UK), GPS Insight (US), Michelin (France), ClearpathGPS (US), Fleetcomplete (Canada), Gurtam (Belarus), Automile (US), VIA (Israel), Fleetroot (UAE), Ruptela (Lithuania), Freeway Fleet (UK). These players have adopted various growth strategies, such as partnerships, agreements and collaborations, new product launches, enhancements, and acquisitions to expand their fleet management market footprint.

Research Coverage

The market study covers the fleet management market size across different segments. It aims at estimating the market size and the growth potential across different segments, including solution (operations management, vehicle maintenance and diagnostics, performance management, fleet analytics and reporting, compliance management, other solutions), services (professional services, managed services), by fleet type (commercial fleets, passenger vehicles) verticals (retail, transportation & logistics, healthcare & pharmaceuticals, construction, utilities, oil, gas and mining, government, other verticals) and Region (North America, Europe, Asia Pacific, Middle East & Africa, and Latin America). The study includes an in-depth competitive analysis of the leading market players, their company profiles, key observations related to product and business offerings, recent developments, and market strategies.

Key Benefits of Buying the Report

The report will help the market leaders/new entrants with information on the closest approximations of the global fleet management market's revenue numbers and subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-

market strategies. Moreover, the report will provide insights for stakeholders to understand the market's pulse and provide them with information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

1. Analysis of key drivers (To enhance the safety and security of workers and monitor driver behavior will drive the market, increasing focus of fleet owners on operational efficiency, increasing adoption of cloud-based, analytical solutions to manage field vehicles, declining hardware and IoT connectivity costs, Strict government mandates creating new revenue streams

for vendors) restraints(Atmospheric interference causing problems for GPS connectivity), opportunities (Development of transportation in the logistics industry and growth in fleet size, development of communication networks through 5G, harnessing telematics data for making informed business decisions, introduction of autonomous fleets to provide multiple partnership opportunities, Mobility-as-a-service to provide new revenue streams, fleet integration with artificial intelligence extends profitable opportunities to market players), and challenges(Inaccurate geocoding, driver safety and productivity affecting vehicle uptime, lack of network connectivity in the non-terrestrial areas, rapidly growing data volumes and increasing cyber threats) influencing the growth of the fleet management market.

2. Product Development/Innovation: Detailed insights on upcoming technologies, research and development activities, and new product and service launches in the fleet management market.

3. Market Development: Comprehensive information about lucrative markets – the report analyses the fleet management market across various regions.

4. Market Diversification: Exhaustive information about new products and services, untapped geographies, recent developments, and investments in the fleet management market.

5. Competitive Assessment: In-depth assessment of market shares, growth strategies and service offerings of leading Geotab (Canada), Verizon Connect (US), Bridgestone Group (Japan), Trimble (US), Samsara (US), Wheels (US), Inseego (US), Solera Group (US), Verra Mobility (US), Teletrac Navman (US), Holman (US), Orbcomm (US), Mix Telematics (South Africa), Zebra Technologies (US), Motive (US), Chevin (UK), GPS

Insight (US), Michelin (France), ClearpathGPS (US), Fleetcomplete (Canada), Gurtam (Belarus), Automile (US), VIA (Israel), Fleetroot (UAE), Ruptela (Lithuania), Freeway Fleet (UK).

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