Can we **SEE** the future?

*Perspectives and trends of the telematics solutions in **SE Europe***

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Market research 2013, 2nd edition

• updated profiles of 54 TSPs (annual turnover, no. of equipped vehicles, no. of employees, latest development achievements, etc.)

• recent data about commercial vehicle fleets in the region (by country & type of vehicles)

• case-studies from SE Europe

• regional trends, perspectives and forecasts
SE Europe in numbers

158 mio inhabitants

9.3 mio commercial vehicles

55% LCVs
18% trucks
15% trailers & semi-trailers
8% buses & coaches
4% road tractors

THE LARGEST MARKETS:

TURKEY (46%)
GREECE (12%)
ROMANIA (11%)
HUNGARY (9%)

Source: Commercial Vehicles in Southeast Europe: Telematics Solutions and Perspectives (2nd edition, 2013)
Regional trends

2012

• approx. 250 telematics solution providers
• 10-20 per SEE country
• growing share of commercial vehicles with telematics solutions
  (530,000 vehicles = 5.5%)

2013

• rapid growth of small TSPs
• very competitive environment
  (up to 50% lower prices, also due to low quality)
• expected mergers and acquisitions
• approx. 630,000 equipped vehicles (6.4%)
Regional forecast 2013-2017

20% CAGR
(vehicles with implemented telematics solutions)

estimated share of equipped vehicles (2012):
~ 25% Slovenia
~ 10-15% Bosnia & Herzegovina, Bulgaria, Croatia, Hungary
~ 7% Turkey
~ 5% other countries

growth of fleets:
2013 9.9 mio → 2017 11.1 mio

market penetration rate:
2013 6.4% → 2017 11.8%

Table: Forecast of commercial vehicles in use and number of equipped vehicles in Southeast Europe | 2013-2017
Source: Commercial Vehicles in Southeast Europe: Telematics Solutions and Perspectives (2nd edition, 2013)