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**MARKET
LEADER**

Building Customer Loyalty and Retention

*RECOGNIZED FOR BEST PRACTICES IN THE
EUROPEAN COMMERCIAL VEHICLE RENTAL
AND LEASING INDUSTRY*

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Best Practices Criteria for World-class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each recognition category before determining the final recognition recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. Fraikin excels in many of the criteria in the commercial vehicle rental and leasing space.

RECOGNITION CRITERIA	
Growth Strategy Excellence	Technology Leverage
Implementation Excellence	Price/Performance Value
Brand Strength	Customer Ownership Experience
Product Quality	Customer Purchase Experience
Product Differentiation	Customer Service Experience

The Transformation of the Commercial Vehicle Rental and Leasing Industry

The European commercial vehicle rental and leasing industry has rapidly shifted toward digitalization and decarbonization over the last 5 years. Stringent emission regulations are accelerating fleet electrification. There is a growing trend toward asset-light, flexible solutions such as short-term hires and subscription models, driven by eCommerce logistics. Telematics and AI integration are now standard for optimizing efficiency, reducing total cost of ownership (TCO), and improving risk management. Overall, the focus has moved from simple ownership transfer to providing data-driven, sustainable mobility services.

Growth Strategy and Implementation Excellence

Fraikin was founded in 1944 with headquarters in Colombes, France. With more than 80 years of expertise, the company provides multi-brand vehicles with different body/trailer configurations, such as tippers, tankers, special-purpose vehicles, and reefers across various sectors, including logistics, retail, food and beverage, waste management, health care, and construction, enabling them to focus on their core operations. Fraikin operates across 10 countries in Europe and positions itself as a key partner for businesses seeking efficient and tailored mobility solutions.

Frost & Sullivan analysts monitor how Fraikin's post-2020 growth strategy has been sharply focused on strengthening its status as the European leader in full-service commercial vehicle fleet management through a multi-pronged approach that includes digitalization, decarbonization, and strategic expansion. A key move during this period was the acquisition of Via Location in October 2020, which significantly enhanced Fraikin's operational network and market presence, specifically within France, setting the stage

for major technological and sustainability initiatives designed to secure the company's long-term leadership.

“The partnership with Samsara will equip more than 53,000 vehicles with AI dashcams and environmental monitors, providing a massive influx of real-time operational data that is crucial for optimizing performance and supporting its upcoming eMobility Service Provider (eMSP) services.”

**- Nithish Murali,
Industry Analyst**

At the core of Fraikin's digitalization strategy is the development and integration of its flagship NeXa mobility platform. This sophisticated fleet management tool centralizes data from diverse vehicle types and brands, providing a unified overview for managing maintenance needs and boosting overall operational efficiency. Further solidifying its technological edge, Fraikin announced a significant partnership with Samsara at the end of 2024 to integrate advanced AI technology into its telematics software. Following this, Fraikin has set an aggressive target: having already installed these advanced

telematics devices in 20% of its fleet vehicles, it aims to scale drastically to cover 70% of its fleet by the end of 2025.

Fraikin's commitment to sustainability is formalized under its DRIVE28 strategy, which sets a clear target that 40% of the fleet must comprise low-emission vehicles by 2035, moving up from the current 3% ZEV base. This transition is supported by strategic financing initiatives aimed at reducing its clients' TCO for new vehicles. Furthermore, Fraikin is ensuring its service backbone is ready by planning to electrify 180 workshops in key locations across various countries, including the United Kingdom, France, Italy, Spain, Germany, Poland, Belgium, Switzerland, and Luxembourg. This physical preparation is complemented by AI-driven telematics to optimize routing and maintenance, maximizing the efficiency of these lower-emission assets.

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Technology Leverage

Fraikin is aggressively leveraging the latest AI technologies to solidify its ambition of becoming the European leader in full-service leasing. A cornerstone of this push is the NeXa mobility platform, launched in 2024, which established a new benchmark for fleet management through advanced integration and real-time data capabilities, directly enhancing both operational efficiency and sustainability across the company's managed fleets. Further deepening this digital commitment, the partnership with Samsara will equip more than 53,000 vehicles with AI

dashcams and environmental monitors, providing a massive influx of real-time operational data that is crucial for optimizing performance and supporting its upcoming eMobility Service Provider (eMSP) services.

This focus on AI extends beyond vehicle operations into customer service, as Fraikin is utilizing AI to elevate its Customer Experience Index (FCXI), aiming to deliver smarter and faster support across all

service touchpoints. By integrating these advanced tools, from real-time vehicle diagnostics through Samsara to internal service optimization through FCXI, Fraikin is ensuring its technological infrastructure is future-proof, aligned with its decarbonization goals, and positioned to offer a superior, data-driven service experience to its customers.

Customer Purchase, Ownership, and Service Experience

Fraikin ensures superior customer purchase experience through a highly specialized and consultative full-service model, differentiating itself from competitors by integrating its strategic advice. The journey begins with a comprehensive, data-driven fleet audit performed by Fraikin's Business Solutions teams, which goes beyond mere pricing to analyzing the customer's operational reality, growth plans, and compliance requirements by improving safety and achieving sustainability goals. This leads to the configuration of a perfectly tailored vehicle, leveraging Fraikin's total manufacturing independence to procure and customize assets from any OEM. This comprehensive approach, which wraps vehicle selection, body construction, financing, and legal compliance into a single, predictable full-service lease contract, is a competitive advantage that eliminates complexity and risk for customers, allowing them to focus entirely on their core business.

The ownership experience is future-proofed and transparent, driven by the NeXa mobility platform, which consolidates all operational and maintenance data. NeXa acts as a central digital hub, unifying data from multi-brand fleets and integrated systems such as Samsara. This platform provides specialized access for different user groups. Fleet managers receive detailed KPIs, compliance reports, and maintenance forecasts through the main dashboard. Meanwhile, drivers are supported by a dedicated mobile application for services such as digital vehicle checks and crucial eMobility functions. To further enhance the relationship, Fraikin uses AI to elevate its FCXI, which tracks and analyzes customer satisfaction, loyalty, and engagement across different stages, including acquisition, service delivery, and contract management, to ensure continuous improvement and smarter, faster service delivery across the entire ownership life cycle.

Fraikin's core commitment to vehicle uptime is delivered through its best-in-class service network, a key differentiator, where the motto You Drive, We Care truly comes to life. This means the company absorbs the operational burdens, so customers do not have to. Fraikin operates through 170 locations, including branches with workshops, to ensure local proximity. This is fortified by an expanding mobile service fleet of state-of-the-art vans, which act as workshops-on-wheels, allowing highly skilled technicians to perform repairs and routine maintenance directly at the customer's site. The NeXa platform and embedded telematics data enable predictive maintenance, automatically flagging vehicle health issues to Fraikin's control centers and proactively notifying customers to schedule service, thereby minimizing vehicle off-road time and securing the uninterrupted operational support that sets Fraikin apart.

Conclusion

Fraikin's current strategy centers on strengthening its European leadership through aggressive digitalization, exemplified by the AI-powered NeXa platform and the Samsara partnership. This digital core supports the DRIVE28 decarbonization mandate, aiming for a 40% low-emission fleet by 2035 and workshop electrification. Enhanced by a consultative full-service purchase model and commitment to uptime under You Drive, We Care, the company maximizes customer value. The AI-refined FCXI ensures continuous, smarter service quality across all touchpoints.

Frost & Sullivan concludes that Fraikin is successfully transforming into a future-proof, data-driven mobility expert. With its strong overall performance, Fraikin earns the 2025 Frost & Sullivan European Market Leadership Recognition in the commercial vehicle rental and leasing industry.

What You Need to Know about the Market Leadership Recognition

Frost & Sullivan's Market Leadership Recognition is its top honor and recognizes the market participant that exemplifies visionary innovation, market-leading performance, and unmatched customer care.

Best Practices Recognition Analysis

For the Market Leadership Recognition, Frost & Sullivan analysts independently evaluated the criteria listed below.

Growth Strategy Excellence: Company demonstrates an ability to consistently identify, prioritize, and pursue emerging growth opportunities

Implementation Excellence: Company processes support efficient and consistent implementation of tactics designed to support the strategy

Brand Strength: Company is respected, recognized, and remembered

Product Quality: Products or services receive high marks for performance, functionality, and reliability at every stage of the life cycle

Product Differentiation: Products or services address a market niche through a combination of price, quality, or uniqueness that other companies cannot easily replicate

Technology Leverage: Company is committed to incorporating leading-edge technologies into product offerings to enhance product performance and value

Price/Performance Value: Products or services provide the best value for the price compared to similar market offerings

Customer Purchase Experience: Purchase experience quality assures customers that they are buying the optimal solution for their unique needs and constraints

Customer Ownership Experience: Customers proudly own the company's product or service and have a positive experience throughout the life of the product or service

Customer Service Experience: Customer service is accessible, fast, stress-free, and high quality

Best Practices Recognition Analytics Methodology

Inspire the World to Support True Leaders

This long-term process spans 12 months, beginning with the prioritization of the sector. It involves a rigorous approach that includes comprehensive scanning and analytics to identify key best practice trends. A dedicated team of analysts, advisors, coaches, and experts collaborates closely, ensuring thorough review and input. The goal is to maximize the company’s long-term value by leveraging unique perspectives to support each Best Practice Recognition and identify meaningful transformation and impact.

STEP		VALUE IMPACT	
		WHAT	WHY
1	Opportunity Universe	Identify Sectors with the Greatest Impact on the Global Economy	Value to Economic Development
2	Transformational Model	Analyze Strategic Imperatives That Drive Transformation	Understand and Create a Winning Strategy
3	Ecosystem	Map Critical Value Chains	Comprehensive Community that Shapes the Sector
4	Growth Generator	Data Foundation That Provides Decision Support System	Spark Opportunities and Accelerate Decision-making
5	Growth Opportunities	Identify Opportunities Generated by Companies	Drive the Transformation of the Industry
6	Frost Radar	Benchmark Companies on Future Growth Potential	Identify Most Powerful Companies to Action
7	Best Practices	Identify Companies Achieving Best Practices in All Critical Perspectives	Inspire the World
8	Companies to Action	Tell Your Story to the World (BICEP*)	Ecosystem Community Supporting Future Success

*Board of Directors, Investors, Customers, Employees, Partners

About Frost & Sullivan

Frost & Sullivan is the Growth Pipeline Company™. We power our clients to a future shaped by growth. Our Growth Pipeline as a Service™ provides the CEO and the CEO's growth team with a continuous and rigorous platform of growth opportunities, ensuring long-term success. To achieve positive outcomes, our team leverages over 60 years of experience, coaching organizations of all types and sizes across 6 continents with our proven best practices. To power your Growth Pipeline future, visit Frost & Sullivan at <http://www.frost.com>.

The Growth Pipeline Generator™

Frost & Sullivan's proprietary model to systematically create ongoing growth opportunities and strategies for our clients is fuelled by the Innovation Generator™.

[Learn more.](#)

Key Impacts:

- **Growth Pipeline:** Continuous Flow of Growth Opportunities
- **Growth Strategies:** Proven Best Practices
- **Innovation Culture:** Optimized Customer Experience
- **ROI & Margin:** Implementation Excellence
- **Transformational Growth:** Industry Leadership



The Innovation Generator™

Our 6 analytical perspectives are crucial in capturing the broadest range of innovative growth opportunities, most of which occur at the points of these perspectives.

Analytical Perspectives:

- **Megatrend (MT)**
- **Business Model (BM)**
- **Technology (TE)**
- **Industries (IN)**
- **Customer (CU)**
- **Geographies (GE)**

