

F R O S T & S U L L I V A N

FROST RADAR

Leverage this unique competitive
benchmarking tool to enhance your
Future Growth Potential

2026



Frost & Sullivan Reveals Top Companies Poised for Growth

Congratulations !!

Frost & Sullivan's global team of analysts and consultants continuously research a wide range of industries across the globe. The primary and secondary analysis spans the entire value chain, identifying organizations that consistently develop new growth strategies based on a visionary understanding of the future and a proven ability to effectively address emerging challenges and opportunities.

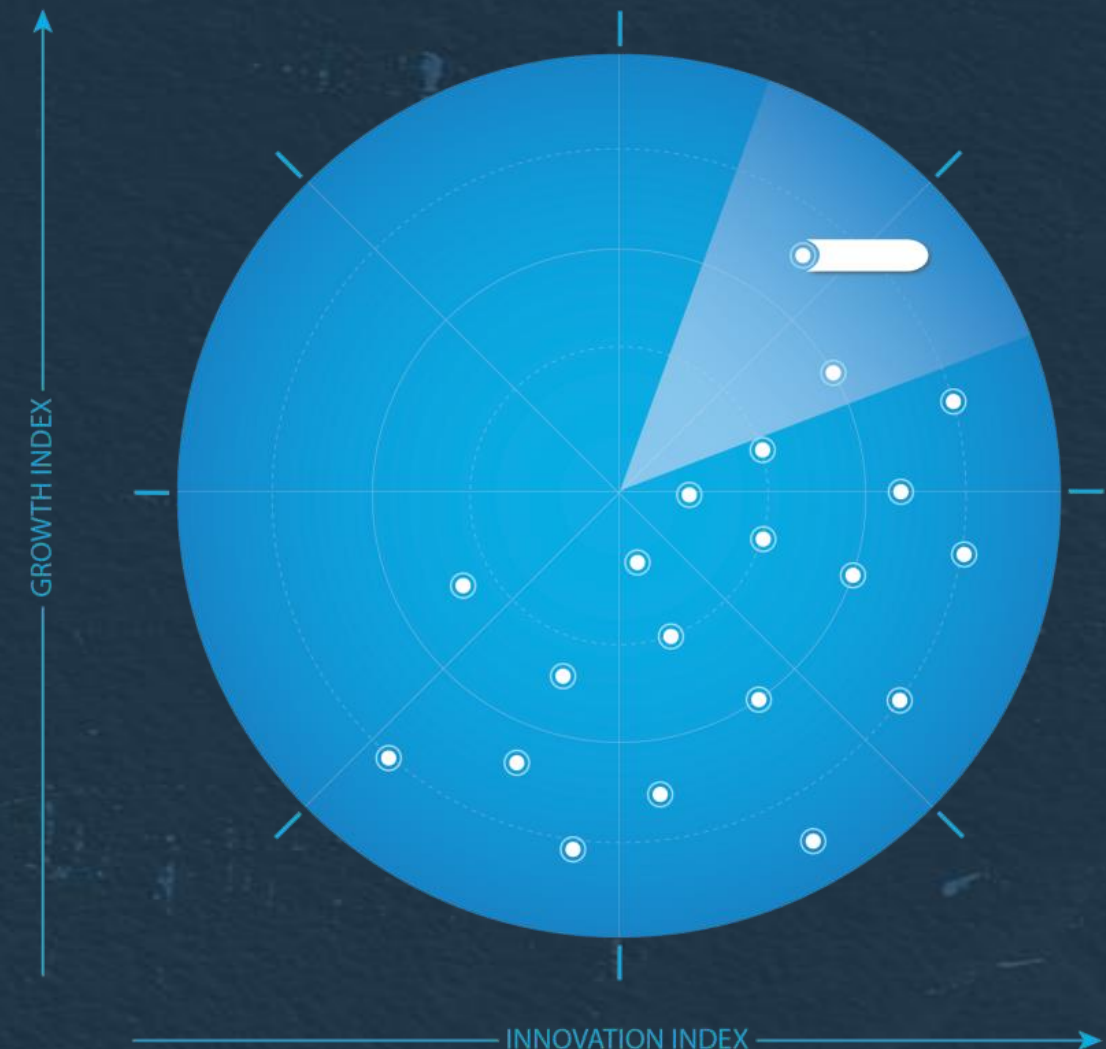
The research and analysis is the foundation of the Frost Radar, a robust analytical tool that benchmarks companies' innovation focus and growth performance in a given market. The dynamic solution offers frequent rating and positioning of companies that are agitating, contending or revolutionizing the industry.

On behalf of the entire Frost & Sullivan team, we are pleased to inform you that your organization has earned placement on the Frost Radar along with an exclusive list of market leaders. The Frost Radar will serve as an important tool for you to evaluate and enhance your future growth potential relative to your competitors. Just as importantly, it will serve as a gauge for all end users and industry leaders responsible for making technology solution decisions and help them identify solution providers with whom they can build long-term Partnerships.

Sincerely yours,

The Frost & Sullivan Frost Radar Management Team

FROST RADAR™



The Frost Radar Leverage and Analytics



Vertical Axis – Growth Index

Growth index is a measure of a company's growth performance and track record, ability to develop and execute a fully aligned growth strategy and vision, a robust growth pipeline system, and effective market, competitor, and end-user focused sales and marketing strategies.

GI1

MARKET SHARE (previous 3 years)

A comparison of a company's market share relative to its competitors in a given market space for the previous 3 years.

GI2

REVENUE GROWTH (previous 3 years)

Company's revenue growth rate for the previous 3 years in the market/industry/category that forms the context for the given Frost Radar.

GI3

GROWTH PIPELINE

An evaluation of the strength and leverage of a company's growth pipeline system to continuously capture, analyze, and prioritize its universe of growth opportunities.

GI4

VISION & STRATEGY

This is an assessment of how well a company's growth strategy is aligned with its vision. Are the investments in new products and markets consistent with the stated vision?

GI5

SALES & MARKETING

A measure of the effectiveness of a company's sales and marketing efforts in helping it drive demand and achieve its growth objectives.

Horizontal Axis – Innovation Index

Innovation index is a measure of a company's ability to develop products/ services/ solutions that are developed with a clear understanding of disruptive mega trends, are globally applicable, can evolve and expand to serve multiple markets, and are aligned to customers' changing needs.

II1

INNOVATION SCALABILITY

This determines whether the organization's innovations are globally scalable and applicable in both developing and mature markets, and also in adjacent and non-adjacent industry verticals.

II2

RESEARCH & DEVELOPMENT

This is a measure of the efficacy of a company's R&D strategy, as determined by the size of its R&D investment and how it feeds the innovation pipeline.

II3

PRODUCT PORTFOLIO

This is a measure of the product portfolio of the company, focusing on the relative contribution of new products to its annual revenues.

II4

MEGATRENDS LEVERAGE

This is an assessment of a company's proactive leverage of evolving long-term opportunities and new business models, as the foundation of its innovation pipeline.

II5

CUSTOMER ALIGNMENT

This evaluates the applicability of a company's products/ services/ solutions to current and potential customers as well as how its innovation strategy is influenced by evolving customer needs.

Frost Radar™: AI-Powered In-car Assistants, 2026



Frost & Sullivan independently evaluated the AI-Powered In-car Assistants landscape and selected just nine companies to be benchmarked in this Frost Radar™. This small, carefully chosen group represents organizations that rise above the broader market; demonstrating not only strong growth, but a clear capacity to innovate and lead. Inclusion is not simply recognition; it signals that a company is operating at the forefront of its industry.

This evaluation is led by Frost & Sullivan's experienced global analyst team, combining deep domain expertise with a rigorous, fact-based approach. Using our proprietary, multi-dimensional benchmarking methodology, applied consistently and validated by analysts. Frost & Sullivan ensures a fair, globally comparable, and defensible assessment of true market leadership.

Frost Radar™: Competitor Categories

■ GROWTH CHAMPIONS

- Achieve significant market growth through effective execution.
- Leverage proven technologies and scalable business models.
- Maintain competitiveness via operational efficiency and customer focus.
- Require increased innovation investment for sustained leadership.

■ CONTENDERS

- Emerging players with modest market presence and cautious strategies.
- Often new entrants or niche participants establishing their position.
- Emphasizes continuous improvement and ensures operational reliability.
- Hold potential for growth through innovation, alliances, and market expansion.

■ VISIONARY LEADERS

- Market leaders with strong balance of innovation and growth.
- Deliver transformative technologies, business models, and processes.
- Influence industry direction and set new benchmarks.
- Combine strategic vision with operational excellence for market dominance.

■ INNOVATORS

- Drive technological advancement with disruptive ideas and solutions.
- Prioritize R&D, IP development, and pioneering concepts.
- Strong innovation foundation with opportunities to accelerate commercialization and scale.
- Benefit from strategic partnerships and targeted go-to-market strategies.

INNOVATION

- Cerence AI has enhanced its automotive AI platform, xUI, with CaLLM (Cerence Automotive Large Language Model), enabling natural, conversational interactions where drivers can complete multiple tasks, such as navigation, climate control, and messaging, through a single voice request.
- Cerence AI uses a hybrid edge-cloud architecture, with CaLLM Edge, its small language model running on automotive-grade chipsets, to deliver fast, reliable voice responses even in areas with limited or no network connectivity.
- The company is moving beyond traditional voice assistants with agentic AI, offering proactive support through secure, Microsoft-powered workplace app access, maintenance reminders, vehicle diagnostics, driving insights, and personalized recommendations based on user preferences.
- Cerence xUI supports Say What You See (SWYS) and multi-occupant voice recognition, allowing it to recognize different passengers and understand on-screen content through natural conversations.
- With xUI, Cerence is delivering conversational AI-powered user experiences to customers including BYD, Geely, Jaguar Land Rover, a Volkswagen Group brand, and a major Japanese OEM. Cerence AI continues to improve voice recognition with automotive-optimized noise suppression and speech enhancement, ensuring accurate performance even in noisy driving environments.
- Cerence AI has strengthened its automotive AI platform by working with Microsoft to implement zero trust security and other measures to safeguard vehicle systems, AI agents, and user data in connected vehicles. It is expanding its AI ecosystem through collaborations with Microsoft, NVIDIA, Qualcomm, SiMa.ai, and others, enabling flexible integration of advanced AI models into next-generation digital cockpit solutions.

GROWTH

- Cerence AI's technology has been shipped in more than 525 million vehicles worldwide. Through new vehicle deployments and OTA updates, Cerence enables automakers to introduce advanced AI-powered experiences without significant hardware changes. Strategic partnerships with Microsoft and NVIDIA accelerate the deployment of AI solutions for software-defined vehicles.
- Cerence AI expanded to other areas of the automotive ecosystem with domain-specific AI agents, such as Ownership Companion, an in-car AI service companion that provides proactive service and maintenance support, and Dealer Assist, providing dealerships with intelligent sales and service automation.
- The company continues to grow its presence globally by securing production programs with leading automakers, including BYD, Geely, Mercedes-Benz, GM, Jaguar Land Rover, and Toyota. Cerence AI's customer base includes more than 80 OEMs and Tier I suppliers.
- Cerence AI is expanding its automotive AI capabilities by integrating OpenAI's ChatGPT into Cerence Chat Pro, enabling software-driven deployment across Volkswagen Group brands without specialized hardware upgrades.
- The company secures revenue through a combination of a traditional licensing model and a usage-based revenue model, creating recurring revenue opportunities as adoption of its connected AI and cloud services continues to increase.
- BYD became the first automaker to launch Cerence xUI in production vehicles, strengthening Cerence's position in the fast-growing EV market, with additional global vehicle programs expected to enter production through 2026.

FROST PERSPECTIVE

- Cerence xUI multi-agent architecture moves beyond voice commands by coordinating AI agents for vehicle health, maintenance, navigation, and productivity. This enables Cerence to deliver a proactive in-car assistant that anticipates driver needs instead of only responding to requests.
- Cerence AI's OEM-controlled branding and data ownership model gives automakers full control of the customer experience, brand identity, and driver data. By avoiding dependence on Big Tech ecosystems, Cerence offers OEMs greater flexibility and stronger ownership of the digital cockpit.
- Cerence AI's Microsoft partnership, integrating Microsoft 365 Copilot, Teams, and Outlook, extends the vehicle beyond infotainment with productivity features for commuters, fleets, and enterprise users, creating a differentiated value proposition.
- CaLLM, trained on Cerence's proprietary automotive voice data, delivers more accurate, vehicle-aware conversations than general-purpose AI models. Its edge AI capabilities improve response speed while reducing reliance on cloud connectivity.
- Cerence AI's zero trust security framework, developed with Microsoft, strengthens cybersecurity for connected and software-defined vehicles. As regulations tighten and connected services grow, the enterprise-grade approach gives OEMs greater confidence in deploying AI-powered cockpit platforms.
- Cerence AI's deep automotive expertise and long-standing OEM relationships provide a strong foundation for expanding its next-generation AI platform. Combining these trusted partnerships with continued advances in generative and agentic AI positions the company to strengthen its leadership and drive the next wave of automotive AI innovation, even as Big Tech companies expand their presence in the sector.