



# 20 25 | COMPANY OF THE YEAR

*Driving impact across the customer value chain*

*RECOGNIZED FOR BEST PRACTICES IN THE  
GLOBAL SMART AUTOMOTIVE TIRE INDUSTRY*

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

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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. Pirelli excels in many of the criteria in the smart automotive tire space.

RECOGNITION CRITERIA	
Business Impact	Customer Impact
Financial Performance	Price/Performance Value
Customer Acquisition	Customer Purchase Experience
Operational Efficiency	Customer Ownership Experience
Growth Potential	Customer Service Experience
Human Capital	Brand Equity

## Top Transformations Impacting Growth in the Smart Automotive Tire Industry

### Leadership Focus

Pirelli’s pioneering Cyber™ Tyre technology highlights how digital systems can redefine traditional automotive components. As the world’s first sensorized tire system capable of communicating real-time data directly to a vehicle’s electronic control unit (ECU), the Cyber Tyre technology sets a new standard in the global smart tire industry. By integrating advanced sensors and algorithms for processing sensor data, Pirelli transforms tires into dynamic data hubs that actively enhance vehicle intelligence.

*“Pirelli’s collaborations with leading automotive brands such as McLaren, Pagani, Audi, and Aston Martin further underscore its ability to translate innovation into measurable, real-world performance.”*

**– Joe Praveen,  
Research Director, Mobility**

Frost & Sullivan recognizes how this innovation marks a shift from tires as passive mechanical elements to active digital interfaces that contribute directly to vehicle performance and safety. Moreover, it highlights the role of tires as intelligent, data-rich assets that will be essential for the evolution of connected and autonomous driving systems.

Pirelli’s collaborations with leading automotive brands such as McLaren, Pagani, Audi, and Aston Martin further underscore its ability to translate innovation into

measurable, real-world performance and safety. These partnerships reflect Pirelli’s strategic role in co-developing solutions that integrate seamlessly with each vehicle’s architecture, delivering superior,

customized driving experiences. By prioritizing innovation, data intelligence, and safety, Pirelli has evolved from being a supplier to becoming a trusted solutions provider and partner within the global automotive ecosystem.

### **Visionary Scenarios through Megatrends**

Pirelli's Cyber Tyre initiative aligns closely with the megatrends transforming global mobility, including digitalization, connectivity, electrification, and autonomous driving. As vehicles become increasingly software-driven, Pirelli anticipates that tires, being the only component in contact with both the vehicle and the road, must also generate real-time intelligence to support this transition. This vision has guided two decades of sustained R&D investment, culminating in the Cyber Tyre system, which enables vehicles to sense, interpret, and respond to road conditions through continuous data exchange and processing.

The company's vision extends beyond improving individual vehicle performance to embrace trends in smart infrastructure and vehicle-to-everything (V2X) communication. It envisions a connected mobility ecosystem where sensorized tire systems share information with vehicles, other tires, and surrounding infrastructure. Such intelligence enhances vehicle dynamics systems, supports predictive maintenance, and contributes to safer, more efficient mobility networks.

### **Best Practices Implementation**

The systematic development and deployment of the Cyber Tyre platform across multiple vehicle categories highlights Pirelli's ability to successfully commercialize its innovative products. Each sensor, weighing approximately 12 grams, is engineered to withstand extreme forces, such as up to 3,500 g in high-performance supercars such as the McLaren Artura, while maintaining seamless communication through Bluetooth Low Energy (BLE) protocols. The sensor captures and transmits key parameters, such as temperature, pressure, and acceleration, which are then processed through Pirelli's proprietary software and algorithms and made available to the vehicle's onboard devices.

The company's best practices lie in its deep integration and co-engineering approach. Through collaborations with Bosch and top-tier OEMs, Cyber Tyre data is leveraged to enhance critical vehicle dynamics systems, including anti-lock braking systems (ABS), traction control, and electronic stability programs (ESPs). For example, in partnership with Bosch, Cyber Tyre technology has been integrated with the ESP of Pagani's Utopia Roadsters, enhancing the handling and safety of these high-performance hypercars.

Pirelli's innovation ecosystem merges materials science, semiconductors, hardware, embedded software, AI, IoT, and data analytics. The company uses advanced digital twin and simulation tools to predict tire behavior under various scenarios, thereby reducing physical testing cycles and accelerating the time-to-market. By consistently investing nearly 5% of its annual revenue in R&D, Pirelli reinforces its position as a global leader in smart tire technology.

Cyber Tyre has been developed to adapt specifically to various vehicle characteristics, seasons, driving conditions and tire models. It can be fitted on the P Zero, which offers exceptional braking performance capabilities, on the P Zero Trofeo RS, designed for use on both roads and racetracks, or even on the P Zero Winter which ensures safe driving and control in winter conditions.

## Addressing Unmet Needs

The absence of real-time, tire-level data to support dynamic vehicle control and predictive safety has represented a major gap. Conventional systems primarily rely on indirect sensors, which provide limited, generic insights. Pirelli's Cyber Tyre technology addresses this gap with embedded sensors that directly measure critical parameters in real time from within the tire itself. This offers a more accurate and immediate understanding of tire and road conditions.

Therefore, it enhances situational awareness while allowing vehicles to adapt optimally in real time based on the data received. The system captures real-time tire information, enabling early detection and prevention of safety risks such as pressure anomalies, aquaplaning, or loss of grip. It also alerts drivers when conditions deviate from optimal performance parameters. Furthermore, it warns users when seasonal tire changes require adjustments to speed ratings. These predictive capabilities boost vehicle safety and reliability.

Cyber Tyre can also provide real-time adaptability. Drivers can access precise data on optimal tire temperature and pressure for track use, effectively turning the system into a virtual "race engineer." The technology is also able to integrate seamlessly with ESP, dynamically adjusting performance settings to help maximize safety and performance in real time. By addressing these needs, Pirelli has redefined the tire as a proactive and active performance and safety enabler rather than a reactive and passive mechanical component.

## Customer Experience

Cyber Tyre technology transforms each tire into an intelligent system. The built-in sensor tracks tire conditions in real time, helping drivers and vehicles achieve peak performance. It signals when tires need warming, have reached optimal grip, or require cooling, while allowing the vehicle to automatically adjust suspension or braking based on load distribution. The system also identifies if the vehicle is fitted with

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winter or summer tires, warning drivers if they exceed safe speed limits or if pressure adjustments are required. In terms of safety, Cyber Tyre continuously provides temperature and pressure data before and during trips, instantly detecting tire position and abnormalities. This responsiveness ensures that customers benefit from smarter, safer, and more stable driving.

Intuitive data visualization further elevates customer experience. Drivers can view real-time tire data directly through the vehicle's infotainment system, giving them complete visibility into tire conditions without the need

for manual checks. Seamless and continuous vehicle communication enhances convenience and reinforces driver confidence in the vehicle's safety systems.

The Cyber Tyre enables smoother handling, improved grip, and optimized braking, irrespective of whether it is being used on a high-speed racing circuit or during daily commuting. Tire intelligence helps personalize the driving experience by adjusting to individual driving styles and road conditions in real time.

## Brand Equity

The introduction of the Cyber Tyre reinforces Pirelli's reputation as a future-focused brand that continuously redefines the limits of tire technology. By pioneering a system that enables tires to "talk" directly with vehicles, Pirelli leads the industry's shift toward smart and connected mobility through strategic partnerships with global automotive leaders, strengthening its brand position.

The Cyber Tyre, a game-changing innovation, has been fitted in models such as the McLaren Artura, Pagani Utopia, Audi RS4, and upcoming Aston Martin vehicles. These collaborations reflect the trust that high-performance and luxury car manufacturers place in Pirelli's engineering and technological capabilities. Additionally, the company's joint development cooperation with Bosch enables faster time-to-market and penetration.

## Customer Impact

The impact of Pirelli's Cyber Tyre extends across drivers, automakers, and the broader automotive ecosystem. By embedding intelligence directly into the tire, Pirelli enhances safety, handling precision, and energy efficiency. The system's ability to detect grip variations, anticipate wear, and communicate these insights to vehicle systems reduces accident risks, extends tire life, and improves overall vehicle performance.

For OEM partners, Cyber Tyre offers a clear differentiation advantage. The integration of tire data enables more responsive vehicle control, reduced braking distances, and improved driving stability. As vehicles move toward autonomous functionality, the presence of reliable, tire-based intelligence will become crucial for safety and adaptability. The digitalization of tires enables multiple service opportunities (such as targeted roadside assistance and tailored tire services) that will further strengthen the interest of consumers and industry players in the technology.

The V2X technology makes all this information available to multiple stakeholders in the mobility sector, enabling additional use cases such as road maintenance, vehicle-to-vehicle or vehicle-to-infrastructure communication of road conditions, and enhanced safety use cases (such as low-grip area information to incoming vehicles). Pirelli's active participation in the 5GAA association confirms its commitment to enabling new use cases and standardization opportunities in the automotive connectivity arena.

## Conclusion

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With its Cyber Tyre technology, Pirelli has transformed tires into intelligent, connected systems that deliver unmatched advances in performance, control, safety, and services. The Cyber Tyre's real-time data capabilities enhance vehicle intelligence, driving precision, and predictive safety, setting new industry standards. Deep OEM partnerships, a strong commitment to innovation, and proven real-world impact continue to underscore Pirelli's leadership as the shift to connected and autonomous mobility unfolds.

For its strong overall performance, Pirelli earns the 2025 Frost & Sullivan Global Company of the Year Recognition in the smart automotive tire market.

## What You Need to Know about the Company of the Year Recognition

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Frost & Sullivan's Company of the Year 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 Company of the Year Recognition, Frost & Sullivan analysts independently evaluated the criteria listed below.

#### Visionary Innovation & Performance

**Addressing Unmet Needs:** Customers' unmet or under-served needs are unearthed and addressed to create growth opportunities across the entire value chain

**Visionary Scenarios Through Megatrends:** Long-range scenarios are incorporated into the innovation strategy by leveraging mega trends and cutting-edge technologies, thereby accelerating the transformational growth journey

**Leadership Focus:** The company focuses on building a leadership position in core markets to create stiff barriers to entry for new competitors and enhance its future growth potential

**Best Practices Implementation:** Best-in-class implementation is characterized by processes, tools, or activities that generate consistent, repeatable, and scalable success

**Financial Performance:** Strong overall business performance is achieved by striking the optimal balance between investing in revenue growth and maximizing operating margin

#### Customer Impact

**Price/Performance Value:** Products or services offer the best ROI and superior value compared to similar market offerings

**Customer Purchase Experience:** Purchase experience with minimal friction and high transparency assures customers that they are buying the optimal solution to address both their needs and constraints

**Customer Ownership Excellence:** Products and solutions evolve continuously in sync with the customers' own growth journeys, engendering pride of ownership and enhanced customer experience

**Customer Service Experience:** Customer service is readily accessible and stress-free, and delivered with high quality, high availability, and fast response time

**Brand Equity:** Customers perceive the brand positively and exhibit high brand loyalty, which is regularly measured and confirmed through a high Net Promoter Score®

## 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.

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

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



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### **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



broadest range of innovative growth opportunities  
of which occur at the points of these perspectives.

### ***Analytical Perspectives:***

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

