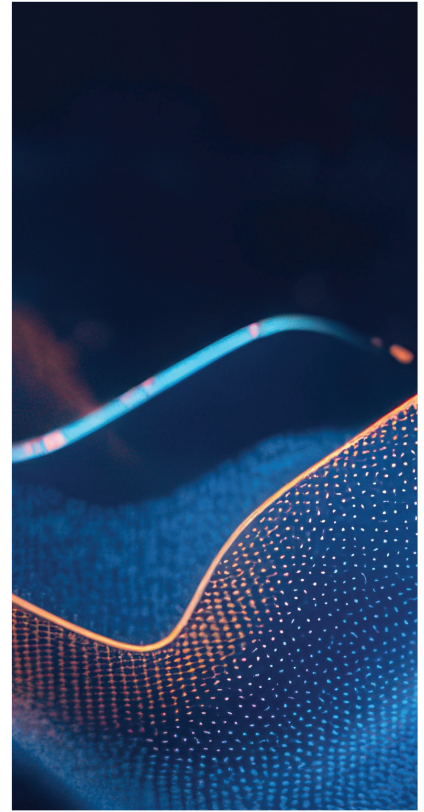
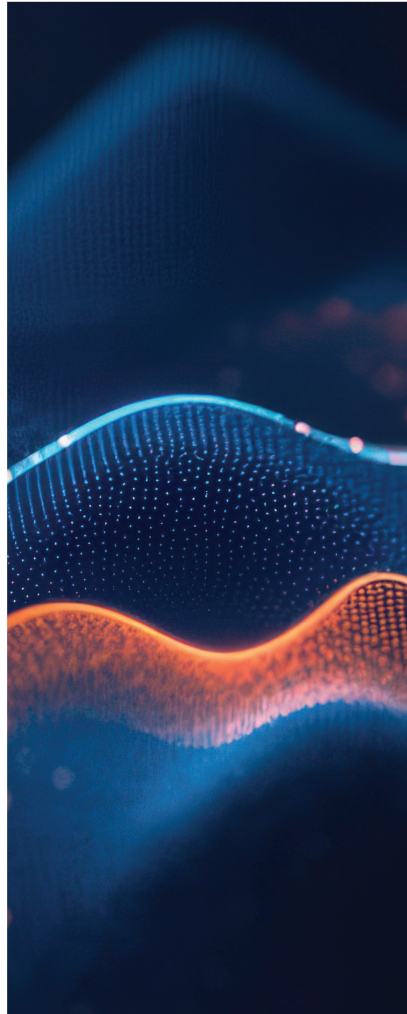


FROST & SULLIVAN
BEST PRACTICES



2026

EUROPEAN COMMERCIAL
VEHICLE SAFETY SYSTEMS

MARKET LEADERSHIP

Brigade

Table of Contents

<i>Best Practices Criteria for World-class Performance</i>	3
<i>Top Transformations Impacting Growth in the XYZ Industry</i>	3
The Transformation of the European Commercial Vehicle Safety Systems Industry	4
Growth Strategy Excellence	4
Product Differentiation	5
Brand Strength	5
Technology Leverage	6
Customer Ownership Experience	6
Implementation Excellence	6
<i>Conclusion</i>	7
Best Practices Recognition Analysis	8
<i>Best Practices Recognition Analytics Methodology</i>	9
Inspire the World to Support True Leaders	9
<i>About Frost & Sullivan</i>	10
The Growth Pipeline Generator™	10
The Innovation Generator™	10

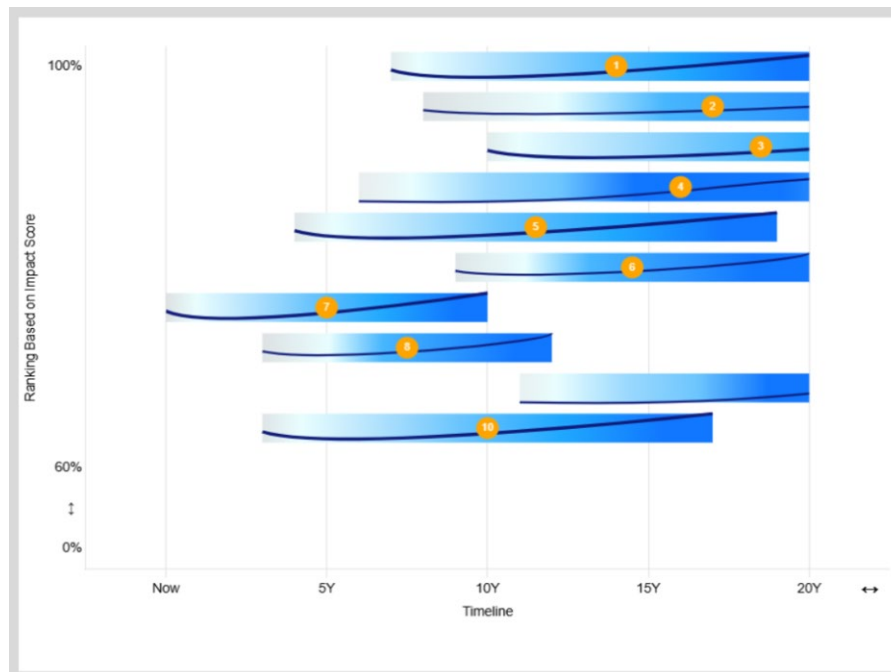
Best Practices Criteria for World-class Performance

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. Brigade Electronics excels in many of the criteria in the commercial vehicle safety systems 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

Top Transformations Impacting Growth in the XYZ Industry

Rank	Strategic Imperative	Timeline	Impact (%)	Impact Curve
1	Geopolitical Chaos Impact of trade tariffs on EV charging component costs	2031 - 45	87	Exponential
2	Transformative Mega Trends Rise of autonomous electric fleets in urban areas	2032 - 50	84	Polynomial
3	Industry Convergence Telecommunications and automotive sectors partnering for connected EV ecosystems	2034 - 51	77	Exponential
4	Transformative Mega Trends Government mandates for green public transportation systems	2030 - 50	76	Logistic
5	Competitive Intensity Entry of tech giants into the EV charging market	2028 - 43	72	Exponential
6	Geopolitical Chaos Political instability affecting infrastructure investments in certain regions	2033 - 44	68	Polynomial
7	Disruptive Technologies Development of ultra-fast charging technology reducing charge times to minutes	2024 - 34	67	Exponential
8	Internal Challenges Legacy IT systems hindering integration with modern e-mobility solutions	2027 - 36	64	Polynomial
9	Industry Convergence Integration of EV charging with renewable energy projects	2035 - 54	62	Logistic
10	Compression of Value Chains Direct manufacturer to consumer sales bypassing traditional dealerships	2027 - 41	61	Exponential



The Transformation of the European Commercial Vehicle Safety Systems Industry

Europe's commercial vehicle safety systems market has shifted from bolt-on visibility aids to integrated, data-driven active-safety stacks shaped by regulation and Vision Zero, a global road safety strategy that aims to eliminate all traffic deaths and serious injuries. New rules hard-code blind-spot/cyclist detection and reversing assistance into every new truck, while city schemes like London's Direct Vision Standard (DVS), which deploys a permit system and measures how well a driver can see vulnerable road users directly from the cab windows, trigger a large retrofit wave across legacy fleets. Technologically, the center of gravity has moved from analog cameras and simple ultrasonics to AI perception, predictive radar, and sensor fusion connected to telematics. Procurement is converging on outcome-based buying—incident reduction and compliance uptime—pulling original equipment manufacturers (OEMs), Tier 1s, and aftermarket leaders into a single, integrated value chain.

Growth Strategy Excellence

Founded in 1976, Brigade Electronics (Brigade) is a UK-headquartered commercial vehicle safety technology company based in Kent, United Kingdom. It designs and supplies integrated safety systems for fleet cameras. Its offerings include monitoring solutions, ultrasonic and radar detection, white-sound reversing alarms, mobile digital recorders, and connected video/telematics. Brigade serves light commercial vehicles (LCVs), heavy goods vehicles (HGVs), buses/coaches, construction, mining, and municipal fleets across Europe via local subsidiaries and a trained installer network.

Brigade has built its growth around a simple idea: turn safety regulation into customer value, then scale it. An aftermarket-led model and a trained Brigade Service Provider network let the company ride each compliance wave, like DVS and General Safety Regulation (GSR), with fast, turnkey retrofit packages, while local subsidiaries keep decisions close to fleets in the UK, Germany, Spain, and the rest of Europe. The portfolio is sold as a safety stack rather than parts. It includes Backeye®360 with side detection, alarms,

and mobile digital recorders (MDRs), delivering fuller safety coverage per vehicle and a consistent driver interface across the fleet.

Practical, demo-first selling and proof-of-concept pilots convert quickly on high-risk use cases (waste, construction, urban delivery), then expand site by site. Adjacencies such as Brigade Van open LCV volumes, and connected video/telematics upgrades protect the installed base and raise lifetime value. Selective OEM integrations complement the core retrofit engine, creating a balanced route to market that has delivered a durable, top-two position across key European segments.

Product Differentiation

Brigade stands out from the competition by equipping fleets with a single, neutral safety stack that works across mixed assets and use cases. It offers a camera monitor as a foundation and uniquely pairs it with patented audible alerts, side/rear radar, ultrasonic detection, connected recording, and worker-protection options, all engineered to fit together out of the box. Hardware-agnostic and retrofit-first means customers are not locked to an OEM or a single sensor type; they can standardize once, then add capability as risks or rules evolve.

Vehicle-specific kits (including an LCV-focused range) shorten time-to-compliance, while a consistent spec language across mounting, cab user interface, and diagnostics keeps drivers and maintenance teams on familiar ground. Competitors tend to be specialists; Brigade's edge is the complete, modular system that scales from a single tipper to a continent-wide fleet without relearning or any rip-and-replace system.

Brand Strength

"Brigade has built its growth around a simple idea: turn safety regulation into customer value, then scale it. An aftermarket-led model and a trained Brigade Service Provider network let the company ride each compliance wave, like DVS and General Safety Regulation (GSR), with fast, turnkey retrofit packages, while local subsidiaries keep decisions close to fleets in the UK, Germany, Spain, and the rest of Europe."

Jack Dunkley,
Mobility Consultant

Fleet buyers opt for Brigade because its offerings have a reputation for being user-friendly, reliable, and consistent across countries. The company operates on an aftermarket-first model, built around retrofitting needs. Its offerings, therefore, feature clear kits, familiar fittings, and installers well-versed in depot constraints. Brigade Service Providers account for 30% of the company's revenue, underscoring the importance of fitment quality and aftercare as integral components of the brand. Customers also benefit from predictability, as pricing is broadly consistent across Europe, which simplifies multi-country roll-outs and avoids postcode premiums.

Brigade is a leading, hardware-centric supplier in key European markets, often ranking among the top 2 in the region. It is a clear leader in the UK, has the highest share among hardware peers in France, and is in the top tier alongside Motec and LUIS in Germany. Such a market-leading position is what operators consider when standardizing a safety spec across mixed fleets.

The ownership experience compounds customer loyalty. Vehicle life drives the refresh cycle, so customers return to the same partner to upgrade from basic camera sets to 360° vision and recording packages over time, keeping drivers on familiar systems and safety managers on a single, trusted stack.

Technology Leverage

Brigade's innovation is practical by design, involving a complete safety stack built around the camera-monitor core, with detection, recording, and alerts layered in. This allows fleets to standardize one solution across mixed assets. The company's technology choices reflect actual market needs. For instance, in the UK, vehicle fleets are predominantly aftermarket and budget-conscious, while in Germany, there is a greater emphasis on digital and artificial intelligence (AI) technologies. As a result, Brigade prioritizes higher-spec vision and detection systems in the German market, significantly enhancing safety. Crucially, vehicle lifetime drives the refresh cycle; solutions are engineered to step up from basic cameras to 360° vision and recording packages without requiring a rip-and-replace system and incorporate a higher level of detection as rules tighten. This modular, compliance-ready engineering turns regulation into repeatable, fleet-wide technology adoption at scale.

Customer Ownership Experience

"Brigade is a leading, hardware-centric supplier in key European markets, often ranking among the top 2 in the region. It is a clear leader in the UK, has the highest share among hardware peers in France, and is in the top tier alongside Motec and LUIS in Germany. Such a market-leading position is what operators consider when standardizing a safety spec across mixed fleets."

Jack Dunkley,
Mobility Consultant

Multi-year customer feedback tracking shows satisfaction and advocacy trending up, with fleets consistently citing product reliability, responsive support, and invoice accuracy as the biggest drivers of a smooth ownership journey. The most frequent improvement request is faster stock availability; Brigade is addressing this with European logistics and inventory upgrades to shorten lead times and keep rollouts and refresh cycles on schedule. Coupled with upgrade-friendly engineering, the result is a predictable, low-friction experience from first fit to end of life, offering clients a stable, confidence-

building ownership journey that lifts protection for drivers and vulnerable road users while keeping disruption low.

Implementation Excellence

Brigade makes complex safety rollouts simple. Compliance needs are translated into prepackaged, vehicle-specific kits, backed by a clear go-to-market strategy. The process starts with a risk walk-through and a pilot fit. Once proven, the team standardizes a safety stack bill of materials—Backeye®360 with side detection, alarms, and MDR—and schedules depot-by-depot installations with minimal downtime. The rollout concludes with driver handover and training. Brigade's retrofit-first approach puts accredited Brigade Service Providers at the center, so installation quality and aftercare are part of the package. Pricing and terms are aligned across core European markets, making cross-border rollouts straightforward for multi-country fleets. The hardware is intentionally layered: it starts with cameras, then adds 360°

surround view, recording, or extra detection as risks or regulations evolve, building on the original installation rather than replacing it.

Conclusion

Brigade has turned Europe's safety mandate cycle into repeatable, customer-value growth. An aftermarket-first model and trained installer network convert compliance into rapid, depot-level rollouts, while a unified safety stack becomes the standard spec across mixed fleets. Customers stay with Brigade because of its consistently superior offerings and upgrades that extend the life of the original investment.

Technology leadership in 360° vision, predictive radar, and AI-assisted detection translates from spec sheet to fewer incidents on the ground. With its strong performance across growth strategy, brand, customer experience, and technology leverage, Brigade Electronics earns Frost & Sullivan's 2026 European Market Leadership Recognition in the commercial vehicle safety systems industry.

What You Need to Know about the Market Leadership Recognition

Frost & Sullivan's Market Leadership Recognition identifies the company that achieved the greatest market share resulting from outstanding performance, products, and services.

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.

VALUE IMPACT			
STEP		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)**

