

Assured PNT Market by Platform (Fighter Aircraft, Military helicopters, unmanned Vehicles, Combat Vehicles, Soldiers, Submarines, Corvettes, Destroyers, and Frigates), End User (Defense, Homeland Security), Component and Region - Global forecast to 2027

Market Report | 2023-03-13 | 206 pages | MarketsandMarkets

AVAILABLE LICENSES:

- Single User \$4950.00
- Multi User \$6650.00
- Corporate License \$8150.00
- Enterprise Site License \$10000.00

Report description:

The assured PNT market is projected to grow from USD 0.4 billion in 2022 to USD 1.7 billion by 2027, at a CAGR of 29.8% from 2022 to 2027. The availability of low-cost military navigation components and ongoing military modernization programs in various countries across the globe are further driving the market growth. However, the operational complexity involved in assembling and maintaining military systems is a key restraint to market growth. The assured PNT market is expected to grow in the next few years due to the advent of advanced technologies, such as artificial intelligence (AI), machine learning (ML), and 5G. The following section discusses the drivers, opportunities, restraints, and challenges and the impact of these parameters on the market. It also provides detailed information about the ecosystem related to the assured PNT market.

Based on the platform, the assured PNT market has been segmented into air, land, and naval. Tactical-grade marine military navigation used in naval ships displays the route or map during combat. Defense naval vessels are specifically designed and used by coastguards and naval forces. Defense vessels differ from commercial ships in their applications, design, construction method, and technologies. Defense ships are classified into two types, namely, surface naval ships and underwater naval ships. The naval segment covers the submarines, destroyers, frigates, and corvettes market. The naval segment is projected to grow with the highest CAGR due to rising demand and increasing procurement of naval fleets by the US and China.

The assured PNT market is segmented into defense and homeland security based on the end user. The defense segment is expected to lead the market during the forecast period due to the growing demand for border surveillance and situational

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

awareness among defense forces and their increased use of UAVs. Assured PNT systems help countries to gain an advantage in GPS/GNSS contested areas to mitigate the risks associated with spoofing and jamming and enable them to identify a precise location.

North America is expected to account for the largest share in 2021

The assured PNT market has been studied for five major regions: North America, Europe, Asia Pacific, the Middle East & Africa, and Latin America. While studying the market, the usage and lifecycle phases of assured PNT systems have been considered across different regions. North America is witnessing increased investments in developing and deploying new and advanced navigation systems to achieve improved interoperability between various units and platforms of defense forces. This region can be considered a maturing market for assured PNT as developments here focus on existing infrastructure advancements.

The break-up of the profile of primary participants in the airborne ISR market:

- By Company Type: Tier 1 - 55%, Tier 2 - 25%, and Tier 3 - 20%
- By Designation: C Level - 75%, Manager Level -25%
- By Region: North America - 20%, Europe - 25%, Asia Pacific - 30%, Middle East - 10%, and Rest of the world - 15%

Research Coverage:

The report segments the assured PNT market based on platform, component, end-user, and Region. The assured PNT market is segmented into air, land, and naval platforms. The assured PNT is segmented into defense and homeland security based on the end user. By component, the market is segmented into atomic clocks, antennas, transponders, sensors, power amplifiers, receivers, and others. The assured PNT market has been studied in North America, Europe, Asia Pacific, the Middle East & Africa, and Latin America. The scope of the study includes thorough information on the important aspects impacting the growth of the assured PNT market, such as drivers, restraints, challenges, and opportunities. A thorough examination of the key industry players has been conducted in order to provide insights into their business overview, solutions, and services, as well as key strategies such as contracts, partnerships, agreements, new product and service launches, mergers and acquisitions, and recent developments in the assured PNT market. This research includes a competitive analysis of upcoming startups in the assured PNT market ecosystem.

Reasons to buy this report:

The research will provide industry leaders and potential entrants with information on the closest estimations of revenue figures for the assured PNT market. This study will assist stakeholders in better understanding the competitive environment and gaining new insights to position their businesses better and develop appropriate go-to-market strategies. The study also assists stakeholders in understanding the pulse of the industry and offers data on major market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

- Market Penetration: The leading companies provide comprehensive information about assured PNT.
- Product Development/Innovation: In-depth information on future technologies, R&D efforts, and new product and service launches in the assured PNT market.
- Market Development: In-depth information on profitable markets - the study examines the assured PNT market in several areas.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

-Market Diversification: Comprehensive data on new goods and services, new geographies, current advancements, and investments in the assured PNT market.

-Competitive Assessment: An in-depth examination of the assured PNT industry's major companies' market shares, growth strategies, and service offerings is provided.

Table of Contents:

1	INTRODUCTION	28
1.1	STUDY OBJECTIVES	28
1.2	MARKET DEFINITION	28
1.3	STUDY SCOPE	29
1.3.1	ASSURED PNT MARKET SEGMENTATION	29
1.3.2	REGIONAL SCOPE	29
1.3.3	YEARS CONSIDERED	29
FIGURE 1	YEARS CONSIDERED	30
1.4	CURRENCY CONSIDERED	30
TABLE 1	USD EXCHANGE RATES	30
1.5	INCLUSIONS AND EXCLUSIONS	31
TABLE 2	ASSURED PNT MARKET: INCLUSIONS AND EXCLUSIONS	31
1.6	LIMITATIONS	31
1.7	MARKET STAKEHOLDERS	31
2	RESEARCH METHODOLOGY	32
2.1	RESEARCH DATA	32
FIGURE 2	RESEARCH PROCESS FLOW	32
FIGURE 3	ASSURED PNT MARKET: RESEARCH DESIGN	33
2.1.1	SECONDARY DATA	33
2.1.1.1	Key data from secondary sources	34
2.1.2	PRIMARY DATA	34
2.1.2.1	Insights from industry experts	34
FIGURE 4	BREAKDOWN OF PRIMARY INTERVIEWS: BY COMPANY TYPE, DESIGNATION, AND REGION	35
2.1.2.2	KEY PRIMARY SOURCES	35
2.2	FACTOR ANALYSIS	35
2.2.1	INTRODUCTION	35
2.2.2	DEMAND-SIDE INDICATORS	36
2.2.2.1	Increase in military expenditure on sensor-based autonomous defense systems	36
2.2.2.2	Rising incidences of regional disputes, terrorism, and political conflicts	36
2.2.3	SUPPLY-SIDE INDICATORS	37
2.2.3.1	Adoption of MEMS in aircraft and defense applications	37
2.2.3.2	Financial trends of major US defense contractors	37
2.2.4	RECESSION IMPACT ANALYSIS	37
FIGURE 5	QUARTERLY REVENUE ANALYSIS OF TOP FIVE KEY PLAYERS	38
2.3	MARKET SIZE ESTIMATION	38
2.4	RESEARCH APPROACH & METHODOLOGY	39
2.4.1	BOTTOM-UP APPROACH	39
2.4.1.1	Market size estimation	39
FIGURE 6	MARKET SIZE ESTIMATION METHODOLOGY: BOTTOM-UP APPROACH	39

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

2.4.2	TOP-DOWN APPROACH	40
FIGURE 7	MARKET SIZE ESTIMATION METHODOLOGY: TOP-DOWN APPROACH	40
2.5	DATA TRIANGULATION	40
FIGURE 8	DATA TRIANGULATION	41
2.6	ASSUMPTIONS	42
FIGURE 9	RESEARCH ASSUMPTIONS	42
2.7	RISK ANALYSIS	42
3	EXECUTIVE SUMMARY	43
FIGURE 10	LAND PLATFORMS TO DOMINATE ASSURED PNT MARKET DURING FORECAST PERIOD	43
FIGURE 11	DEFENSE TO LEAD END USER SEGMENT DURING FORECAST PERIOD	44
FIGURE 12	NORTH AMERICA TO COMMAND LARGEST SHARE OF MARKET	44
4	PREMIUM INSIGHTS	46
4.1	ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN ASSURED PNT MARKET	46
FIGURE 13	RIISING DEMAND FOR MISSILES AND ARTILLERY SYSTEMS TO BOOST ASSURED PNT MARKET FROM 2022 TO 2027	46
4.2	ASSURED PNT MARKET, BY PLATFORM	46
FIGURE 14	LAND PLATFORMS TO LEAD ASSURED PNT MARKET DURING FORECAST PERIOD	46
4.3	ASSURED PNT MARKET, BY END USER	47
FIGURE 15	DEFENSE TO BE LARGEST END USER SEGMENT FROM 2022 TO 2027	47
4.4	ASSURED PNT MARKET, BY COUNTRY	47
FIGURE 16	US MARKET PROJECTED TO GROW AT HIGHEST CAGR FROM 2022 TO 2027	47
5	MARKET OVERVIEW	48
5.1	INTRODUCTION	48
5.2	MARKET DYNAMICS	48
FIGURE 17	ASSURED PNT MARKET DYNAMICS	48
5.2.1	DRIVERS	49
5.2.1.1	High demand for assured global positioning system (GPS) in military applications	49
5.2.1.2	Increasing demand for accuracy in navigation	49
5.2.1.3	Availability of miniaturized components at affordable prices	49
5.2.1.4	Increasing preference for use of UAVs in modern warfare	50
5.2.1.5	Use of UAVs as loitering munition by defense forces	50
TABLE 3	COUNTRIES THAT USE LOITERING MUNITION	50
5.2.1.6	Advent of next-generation military platforms and weapon technologies	51
5.2.2	RESTRAINTS	51
5.2.2.1	Absence of established operational parameters	51
5.2.3	OPPORTUNITIES	51
5.2.3.1	Ongoing R&D programs	51
5.2.3.2	Increasing application to mitigate effects of threats	52
5.2.3.3	Increasing demand for new-generation air and missile defense systems	52
5.2.3.4	Integration of anti-jamming capabilities with navigation systems	52
5.2.4	CHALLENGES	53
5.2.4.1	Limited development of feasible technologies	53
5.2.4.2	High cost of development of military navigation equipment	53
5.3	VALUE CHAIN ANALYSIS	53
FIGURE 18	VALUE CHAIN ANALYSIS: ASSURED PNT MARKET	53
5.4	PRICING ANALYSIS	54
5.4.1	COST OF INERTIAL NAVIGATION SYSTEMS USED FOR VARIOUS GRADES AND MANUFACTURERS OF INS	54
5.5	TRADE ANALYSIS	55

TABLE 4	IMPORT VALUE OF RADAR APPARATUS, RADIO NAVIGATIONAL AID APPARATUS, AND RADIO REMOTE CONTROL APPARATUS [PRODUCT HARMONIZED SYSTEM CODE: 8526, USD MILLION (2017-2021)]	55
TABLE 5	EXPORTED VALUE OF RADAR APPARATUS, RADIO NAVIGATIONAL AID APPARATUS, AND RADIO REMOTE CONTROL APPARATUS [(PRODUCT HARMONIZED SYSTEM CODE: 8526, USD MILLION (2017-2021))]	57
5.6	DISRUPTIONS IMPACTING CUSTOMER BUSINESS	59
5.6.1	REVENUE SHIFT AND NEW REVENUE POCKETS FOR ASSURED PNT MARKET	59
FIGURE 19	TRENDS AND DISRUPTIONS IMPACTING CUSTOMERS	59
5.7	MARKET ECOSYSTEM	59
5.7.1	PROMINENT COMPANIES	59
5.7.2	PRIVATE AND SMALL ENTERPRISES	59
5.7.3	END USERS	60
FIGURE 20	ASSURED PNT ECOSYSTEM	60
TABLE 6	ASSURED PNT MARKET ECOSYSTEM	60
5.8	RECESSION IMPACT ANALYSIS	61
5.8.1	UNCERTAINTY ANALYSIS	61
5.8.2	FACTORS IMPACTING ASSURED PNT MARKET, 2022-2023	62
5.8.3	PROBABLE SCENARIO IMPACT OF ASSURED PNT MARKET	63
5.9	TECHNOLOGY ANALYSIS	63
5.9.1	GNSS AND INTERNET OF THINGS	63
5.9.2	5G AND GNSS	63
5.9.3	GNSS AND MACHINE LEARNING/ARTIFICIAL INTELLIGENCE	64
5.9.4	COMPACT GPS ANTI-JAM SYSTEMS	64
5.9.5	ALTERNATIVE TO GPS ANTI-JAM TECHNOLOGY	64
5.10	CASE STUDY ANALYSIS	65
5.10.1	GPS ANTI-JAMMING TECH BY NOVATEL AND JUNCTION BOX BY FORSBERG SELECTED TO PROTECT ROYAL NAVY T26 FRIGATE	65
5.10.2	NOVATEL'S ANTI-JAM ANTENNA SELECTED FOR CANADIAN ARMY OBSERVATION POST VEHICLES	65
5.10.3	PASSIVE ANTI-JAM ANTENNA USED TO COMBAT GNSS INTERFERENCE	65
5.11	PORTER'S FIVE FORCES	66
TABLE 7	ASSURED PNT MARKET: PORTER'S FIVE FORCES ANALYSIS	66
FIGURE 21	PORTER'S FIVE FORCES ANALYSIS: ASSURED PNT MARKET	66
5.11.1	THREAT OF NEW ENTRANTS	67
5.11.2	THREAT OF SUBSTITUTES	67
5.11.3	BARGAINING POWER OF SUPPLIERS	67
5.11.4	BARGAINING POWER OF BUYERS	67
5.11.5	INTENSITY OF COMPETITIVE RIVALRY	67
5.12	OPERATIONAL DATA	68
TABLE 8	MAIN BATTLE TANKS VOLUME ANALYSIS, BY COUNTRY, 2018-2021	68
TABLE 9	INFANTRY FIGHTING VEHICLES VOLUME ANALYSIS, BY COUNTRY, 2018-2021	69
5.13	TARIFF AND REGULATORY LANDSCAPE	69
5.13.1	EUROPEAN UNION REGULATION NO. 1285/2013 - IMPLEMENTATION AND EXPLOITATION OF EUROPEAN SATELLITE NAVIGATION SYSTEMS	69
5.13.2	EUROPEAN UNION REGULATION NO. 2015/758 - ECALL IN-VEHICLE SYSTEM	70
5.13.3	US SPACE-BASED POSITIONING, NAVIGATION, AND TIMING POLICY	70
5.13.4	GDPR	70
5.13.5	ICAO POLICY ON GNSS	71
5.13.6	REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	71

TABLE 10	REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	71
5.14	KEY CONFERENCES & EVENTS IN 2023	71
TABLE 11	ASSURED PNT MARKET: CONFERENCES & EVENTS, 2023	71
5.15	KEY STAKEHOLDERS & BUYING CRITERIA	72
5.15.1	KEY STAKEHOLDERS IN BUYING PROCESS	72
FIGURE 22	INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR TOP THREE PLATFORMS	72
TABLE 12	INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR TOP THREE PLATFORMS (%)	72
5.15.2	KEY BUYING CRITERIA	73
FIGURE 23	KEY BUYING CRITERIA FOR TOP THREE PLATFORMS	73
TABLE 13	KEY BUYING CRITERIA FOR TOP THREE PLATFORMS	73
6	INDUSTRY TRENDS	74
6.1	INTRODUCTION	74
6.2	TECHNOLOGY TRENDS	74
6.2.1	ERROR-FREE DIGITAL OUTPUT THROUGH AIR DATA COMPUTERS	74
6.2.2	SIMULATION AND DEBRIEFING THROUGH WEAPONS-INTEGRATED BATTLEFIELD MANAGEMENT SYSTEMS	75
6.2.3	WIRELESS INERTIAL MEASUREMENT UNITS - FOR USE IN ROBOTICS AND UAVS	75
6.2.4	MICRO-ELECTRO-MECHANICAL SYSTEMS - FOR REAL-TIME CONTROL	75
6.2.5	HIGH-END INS - WIDELY USED IN MARINE APPLICATIONS	75
6.2.5.1	Ring laser gyro inertial navigation sensors	75
6.2.5.2	Fiber optic gyro inertial navigation sensors	76
6.2.6	GPS-AIDED INS - OFFERS ENHANCED DATA	76
6.2.7	AIR DATA INERTIAL REFERENCE UNIT ELIMINATES NEED FOR EXTRA COMPONENTS	76
6.2.8	MULTI-SENSOR DATA FUSION FOR UAV NAVIGATION	77
6.2.8.1	Use of sense & avoid technology	77
6.2.9	ADVANCED INERTIAL NAVIGATION SYSTEMS FOR UUVS	77
6.3	SUPPLY CHAIN ANALYSIS	77
FIGURE 24	SUPPLY CHAIN ANALYSIS	78
6.4	IMPACT OF MEGATRENDS	78
6.4.1	ARTIFICIAL INTELLIGENCE	79
6.5	INNOVATIONS AND PATENT REGISTRATIONS	79
TABLE 14	ASSURED PNT: KEY PATENTS (2020-2022)	80
7	ASSURED PNT MARKET, BY COMPONENT	82
7.1	INTRODUCTION	82
7.2	ATOMIC CLOCKS	82
7.3	ANTENNAS	82
7.4	TRANSPONDERS	82
7.5	SENSORS	83
7.6	POWER AMPLIFIERS	83
7.7	RECEIVERS	83
7.8	OTHERS	84
8	ASSURED PNT MARKET, BY PLATFORM	85
8.1	INTRODUCTION	86
FIGURE 25	ASSURED PNT MARKET, BY PLATFORM, 2022-2027 (USD MILLION)	86
TABLE 15	ASSURED PNT MARKET, BY PLATFORM, 2019-2021 (USD MILLION)	86
TABLE 16	ASSURED PNT MARKET, BY PLATFORM, 2022-2027 (USD MILLION)	86
8.2	LAND	87
8.2.1	COMBAT VEHICLES	87

8.2.1.1	Increasing integration of new PNT systems in modernized vehicle platforms	87
8.2.1.1.1	Main Battle Tanks (MBTs)	87
8.2.1.1.1.1	Increasing demand for MBTs in cross-country operations	87
8.2.1.1.2	Infantry Fighting Vehicles (IFVs)	87
8.2.1.1.2.1	Increased procurement of IFVs by emerging economies	87
8.2.1.1.3	Armored Personnel Carriers (APCs)	88
8.2.1.1.3.1	Demand for weapon system-armored personnel carriers	88
8.2.1.1.4	Armored Amphibious Vehicles (AAVs)	88
8.2.1.1.4.1	Increasing demand to carry troops from sea to land battlefields	88
8.2.1.1.5	Mine-Resistant Ambush Protected (MRAP) vehicles	88
8.2.1.1.5.1	Used for protection of troops from IEDs and mines	88
8.2.1.1.6	Light Protected Vehicles (LPVs)	89
8.2.1.1.6.1	Increasing use of LPVs for border patrolling and surveillance activities	89
8.2.2	UNMANNED GROUND VEHICLES	89
8.2.2.1	Demand driven by need for protection and rescue duties	89
8.2.3	SOLDIERS	89
8.2.3.1	Replace GPS receivers and single source of positioning & navigation	89
8.3	AIR	90
8.3.1	MILITARY AIRCRAFT	90
8.3.1.1	Increasing demand for new aircraft with advanced capabilities	90
8.3.1.1.1	Special mission aircraft	90
8.3.1.1.1.1	Evolving warfare techniques to drive demand	90
8.3.1.1.2	Fighter aircraft	90
8.3.1.1.2.1	Growing procurement due to increasing geopolitical rifts	90
8.3.2	MILITARY HELICOPTERS	91
8.3.2.1	Increasing use in combat search & rescue operations	91
8.3.3	UNMANNED AERIAL VEHICLES	91
8.3.3.1	Increasing proliferation of drones for ISR missions	91
8.4	NAVAL	92
8.4.1	DESTROYERS	92
8.4.1.1	Increasing procurement by US and China	92
8.4.2	FRIGATES	92
8.4.2.1	Rising construction and maintenance of frigates drive demand	92
8.4.3	CORVETTES	93
8.4.3.1	Growing focus of China on induction of advanced corvettes by 2030	93
8.4.4	SUBMARINES	93
8.4.4.1	Increasing efforts of US, China, and India to develop advanced submarines	93
9	ASSURED PNT MARKET, BY END USER	94
9.1	INTRODUCTION	95
FIGURE 26	ASSURED PNT MARKET, BY END USER, 2022-2027 (USD MILLION)	95
TABLE 17	ASSURED PNT MARKET, BY END USER, 2019-2021 (USD MILLION)	95
TABLE 18	ASSURED PNT MARKET, BY END USER, 2022-2027 (USD MILLION)	95
9.2	DEFENSE	96
9.2.1	EXPANSION OF OPERATIONAL AWARENESS AND NEW CAPABILITIES TO DRIVE SEGMENT	96
9.3	HOMELAND SECURITY	96
9.3.1	INCREASING R&D ACTIVITIES FOR RESILIENT PNT TO FUEL GROWTH	96
10	REGIONAL ANALYSIS	97

10.1 INTRODUCTION 98

FIGURE 27 NORTH AMERICA TO DOMINATE ASSURED PNT MARKET FROM 2022 TO 2027 98

10.2 RECESSION IMPACT ANALYSIS 99

TABLE 19 RECESSION IMPACT ANALYSIS 100

TABLE 20 ASSURED PNT MARKET, BY REGION, 2019-2021 (USD MILLION) 101

TABLE 21 ASSURED PNT MARKET, BY REGION, 2022-2027 (USD MILLION) 101

10.3 NORTH AMERICA 101

10.3.1 RECESSION IMPACT ANALYSIS: NORTH AMERICA 102

10.3.2 PESTLE ANALYSIS: NORTH AMERICA 102

FIGURE 28 ASSURED PNT MARKET: NORTH AMERICA SNAPSHOT 103

TABLE 22 NORTH AMERICA: ASSURED PNT MARKET, BY PLATFORM, 2019-2021 (USD MILLION) 103

TABLE 23 NORTH AMERICA: ASSURED PNT MARKET, BY PLATFORM, 2022-2027 (USD MILLION) 104

TABLE 24 NORTH AMERICA: ASSURED PNT MARKET, BY END USER, 2019-2021 (USD MILLION) 104

TABLE 25 NORTH AMERICA: ASSURED PNT MARKET, BY END USER, 2022-2027 (USD MILLION) 104

TABLE 26 NORTH AMERICA: ASSURED PNT MARKET, BY COUNTRY, 2019-2021 (USD MILLION) 104

TABLE 27 NORTH AMERICA: ASSURED PNT MARKET, BY COUNTRY, 2022-2027 (USD MILLION) 104

10.3.3 US 105

10.3.3.1 Presence of leading manufacturers in country 105

TABLE 28 US: ASSURED PNT MARKET, BY PLATFORM, 2019-2021 (USD MILLION) 105

TABLE 29 US: ASSURED PNT MARKET, BY PLATFORM, 2022-2027 (USD MILLION) 105

TABLE 30 US: ASSURED PNT MARKET, BY END USER, 2019-2021 (USD MILLION) 105

TABLE 31 US: ASSURED PNT MARKET, BY END USER, 2022-2027 (USD MILLION) 105

10.3.4 CANADA 106

10.3.4.1 High investments in development and upgrade of weapons 106

TABLE 32 CANADA: ASSURED PNT MARKET, BY PLATFORM, 2019-2021 (USD MILLION) 106

TABLE 33 CANADA: ASSURED PNT MARKET, BY PLATFORM, 2022-2027 (USD MILLION) 106

TABLE 34 CANADA: ASSURED PNT MARKET, BY END USER, 2019-2021 (USD MILLION) 106

TABLE 35 CANADA: ASSURED PNT MARKET, BY END USER, 2022-2027 (USD MILLION) 106

10.4 EUROPE 107

10.4.1 RECESSION IMPACT ANALYSIS: EUROPE 107

10.4.2 PESTLE ANALYSIS: EUROPE 107

FIGURE 29 ASSURED PNT MARKET: EUROPE SNAPSHOT 109

TABLE 36 EUROPE: ASSURED PNT MARKET, BY PLATFORM, 2019-2021 (USD MILLION) 109

TABLE 37 EUROPE: ASSURED PNT MARKET, BY PLATFORM, 2022-2027 (USD MILLION) 110

TABLE 38 EUROPE: ASSURED PNT MARKET, BY END USER, 2019-2021 (USD MILLION) 110

TABLE 39 EUROPE: ASSURED PNT MARKET, BY END USER, 2022-2027 (USD MILLION) 110

TABLE 40 EUROPE: ASSURED PNT MARKET, BY COUNTRY, 2019-2021 (USD MILLION) 110

TABLE 41 EUROPE: ASSURED PNT MARKET, BY COUNTRY, 2022-2027 (USD MILLION) 111

10.4.3 RUSSIA 111

10.4.3.1 Increasing investments in AI as part of modernization 111

TABLE 42 RUSSIA: ASSURED PNT MARKET, BY PLATFORM, 2019-2021 (USD MILLION) 111

TABLE 43 RUSSIA: ASSURED PNT MARKET, BY PLATFORM, 2022-2027 (USD MILLION) 111

TABLE 44 RUSSIA: ASSURED PNT MARKET, BY END USER, 2019-2021 (USD MILLION) 112

TABLE 45 RUSSIA: ASSURED PNT MARKET, BY END USER, 2022-2027 (USD MILLION) 112

10.4.4 UK 112

10.4.4.1 Need for secure guidance systems by Royal Armed Forces 112

TABLE 46 UK: ASSURED PNT MARKET, BY PLATFORM, 2019-2021 (USD MILLION) 112

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

TABLE 47	UK: ASSURED PNT MARKET, BY PLATFORM, 2022-2027 (USD MILLION)	113
TABLE 48	UK: ASSURED PNT MARKET, BY END USER, 2019-2021 (USD MILLION)	113
TABLE 49	UK: ASSURED PNT MARKET, BY END USER, 2022-2027 (USD MILLION)	113
10.4.5	FRANCE	113
10.4.5.1	Focus on internal security and interoperability of defense forces	113
TABLE 50	FRANCE: ASSURED PNT MARKET, BY PLATFORM, 2019-2021 (USD MILLION)	114
TABLE 51	FRANCE: ASSURED PNT MARKET, BY PLATFORM, 2022-2027 (USD MILLION)	114
TABLE 52	FRANCE: ASSURED PNT MARKET, BY END USER, 2019-2021 (USD MILLION)	114
TABLE 53	FRANCE: ASSURED PNT MARKET, BY END USER, 2022-2027 (USD MILLION)	114
10.4.6	GERMANY	115
10.4.6.1	High demand from government agencies to maintain law & order	115
TABLE 54	GERMANY: ASSURED PNT MARKET, BY PLATFORM, 2019-2021 (USD MILLION)	115
TABLE 55	GERMANY: ASSURED PNT MARKET, BY PLATFORM, 2022-2027 (USD MILLION)	115
TABLE 56	GERMANY: ASSURED PNT MARKET, BY END USER, 2019-2021 (USD MILLION)	115
TABLE 57	GERMANY: ASSURED PNT MARKET, BY END USER, 2022-2027 (USD MILLION)	116
10.4.7	ITALY	116
10.4.7.1	Focus on battlefield readiness technologies that employ PNT systems	116
TABLE 58	ITALY: ASSURED PNT MARKET, BY PLATFORM, 2019-2021 (USD MILLION)	116
TABLE 59	ITALY: ASSURED PNT MARKET, BY PLATFORM, 2022-2027 (USD MILLION)	116
TABLE 60	ITALY: ASSURED PNT MARKET, BY END USER, 2019-2021 (USD MILLION)	117
TABLE 61	ITALY: ASSURED PNT MARKET, BY END USER, 2022-2027 (USD MILLION)	117
10.4.8	REST OF EUROPE	117
10.4.8.1	Geopolitical rifts to encourage adoption of modern vehicle platforms	117
TABLE 62	REST OF EUROPE: ASSURED PNT MARKET, BY PLATFORM, 2019-2021 (USD MILLION)	117
TABLE 63	REST OF EUROPE: ASSURED PNT MARKET, BY PLATFORM, 2022-2027 (USD MILLION)	117
TABLE 64	REST OF EUROPE: ASSURED PNT MARKET, BY END USER, 2019-2021 (USD MILLION)	118
TABLE 65	REST OF EUROPE: ASSURED PNT MARKET, BY END USER, 2022-2027 (USD MILLION)	118
10.5	ASIA PACIFIC	118
10.5.1	RECESSION IMPACT ANALYSIS: ASIA PACIFIC	118
10.5.2	PESTLE ANALYSIS: ASIA PACIFIC	119
FIGURE 30	ASSURED PNT MARKET: ASIA PACIFIC SNAPSHOT	120
TABLE 66	ASIA PACIFIC: ASSURED PNT MARKET, BY PLATFORM, 2019-2021 (USD MILLION)	120
TABLE 67	ASIA PACIFIC: ASSURED PNT MARKET, BY PLATFORM, 2022-2027 (USD MILLION)	121
TABLE 68	ASIA PACIFIC: ASSURED PNT MARKET, BY END USER, 2019-2021 (USD MILLION)	121
TABLE 69	ASIA PACIFIC: ASSURED PNT MARKET, BY END USER, 2022-2027 (USD MILLION)	121
TABLE 70	ASIA PACIFIC: ASSURED PNT MARKET, BY COUNTRY, 2019-2021 (USD MILLION)	121
TABLE 71	ASIA PACIFIC: ASSURED PNT MARKET, BY COUNTRY, 2022-2027 (USD MILLION)	122
10.5.3	CHINA	122
10.5.3.1	Increasing defense spending and conflicts with other countries	122
TABLE 72	CHINA: ASSURED PNT MARKET, BY PLATFORM, 2019-2021 (USD MILLION)	122
TABLE 73	CHINA: ASSURED PNT MARKET, BY PLATFORM, 2022-2027 (USD MILLION)	122
TABLE 74	CHINA: ASSURED PNT MARKET, BY END USER, 2019-2021 (USD MILLION)	123
TABLE 75	CHINA: ASSURED PNT MARKET, BY END USER, 2022-2027 (USD MILLION)	123
10.5.4	INDIA	123
10.5.4.1	Rising military expenditure and ongoing modernization programs	123
TABLE 76	INDIA: ASSURED PNT MARKET, BY PLATFORM, 2019-2021 (USD MILLION)	123
TABLE 77	INDIA: ASSURED PNT MARKET, BY PLATFORM, 2022-2027 (USD MILLION)	124

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

TABLE 78	INDIA: ASSURED PNT MARKET, BY END USER, 2019-2021 (USD MILLION)	124
TABLE 79	INDIA: ASSURED PNT MARKET, BY END USER, 2022-2027 (USD MILLION)	124
10.5.5	JAPAN	124
10.5.5.1	Use of military navigation systems in defense on the rise	124
TABLE 80	JAPAN: ASSURED PNT MARKET, BY PLATFORM, 2019-2021 (USD MILLION)	125
TABLE 81	JAPAN: ASSURED PNT MARKET, BY PLATFORM, 2022-2027 (USD MILLION)	125
TABLE 82	JAPAN: ASSURED PNT MARKET, BY END USER, 2019-2021 (USD MILLION)	125
TABLE 83	JAPAN: ASSURED PNT MARKET, BY END USER, 2022-2027 (USD MILLION)	125
10.5.6	SOUTH KOREA	126
10.5.6.1	Installation of GPS anti-jammers due to ongoing disputes with North Korea	126
TABLE 84	SOUTH KOREA: ASSURED PNT MARKET, BY PLATFORM, 2019-2021 (USD MILLION)	126
TABLE 85	SOUTH KOREA: ASSURED PNT MARKET, BY PLATFORM, 2022-2027 (USD MILLION)	126
TABLE 86	SOUTH KOREA: ASSURED PNT MARKET, BY END USER, 2019-2021 (USD MILLION)	126
TABLE 87	SOUTH KOREA: ASSURED PNT MARKET, BY END USER, 2022-2027 (USD MILLION)	126
10.5.7	AUSTRALIA	127
10.5.7.1	Demand for modern digital technologies in military equipment	127
TABLE 88	AUSTRALIA: ASSURED PNT MARKET, BY PLATFORM, 2019-2021 (USD MILLION)	127
TABLE 89	AUSTRALIA: ASSURED PNT MARKET, BY PLATFORM, 2022-2027 (USD MILLION)	127
TABLE 90	AUSTRALIA: ASSURED PNT MARKET, BY END USER, 2019-2021 (USD MILLION)	127
TABLE 91	AUSTRALIA: ASSURED PNT MARKET, BY END USER, 2022-2027 (USD MILLION)	127
10.5.8	REST OF ASIA PACIFIC	128
10.5.8.1	Increased technological advancements in navigation systems	128
TABLE 92	REST OF ASIA PACIFIC: ASSURED PNT MARKET, BY PLATFORM, 2019-2021 (USD MILLION)	128
TABLE 93	REST OF ASIA PACIFIC: ASSURED PNT MARKET, BY PLATFORM, 2022-2027 (USD MILLION)	128
TABLE 94	REST OF ASIA PACIFIC: ASSURED PNT MARKET, BY END USER, 2019-2021 (USD MILLION)	128
TABLE 95	REST OF ASIA PACIFIC: ASSURED PNT MARKET, BY END USER, 2022-2027 (USD MILLION)	129
10.6	MIDDLE EAST & AFRICA	129
10.6.1	RECESSION IMPACT ANALYSIS: MIDDLE EAST & AFRICA	129
10.6.2	PESTLE ANALYSIS: MIDDLE EAST & AFRICA	129
FIGURE 31	ASSURED PNT MARKET: MIDDLE EAST & AFRICA SNAPSHOT	131
TABLE 96	MIDDLE EAST & AFRICA: ASSURED PNT MARKET, BY PLATFORM, 2019-2021 (USD MILLION)	131
TABLE 97	MIDDLE EAST & AFRICA: ASSURED PNT MARKET, BY PLATFORM, 2022-2027 (USD MILLION)	132
TABLE 98	MIDDLE EAST & AFRICA: ASSURED PNT MARKET, BY END USER, 2019-2021 (USD MILLION)	132
TABLE 99	MIDDLE EAST & AFRICA: ASSURED PNT MARKET, BY END USER, 2022-2027 (USD MILLION)	132
TABLE 100	MIDDLE EAST & AFRICA: ASSURED PNT MARKET, BY COUNTRY, 2019-2021 (USD MILLION)	132
TABLE 101	MIDDLE EAST & AFRICA: ASSURED PNT MARKET, BY COUNTRY, 2022-2027 (USD MILLION)	133
10.6.3	SAUDI ARABIA	133
10.6.3.1	Growing need for cyber defense	133
TABLE 102	SAUDI ARABIA: ASSURED PNT MARKET, BY PLATFORM, 2019-2021 (USD MILLION)	133
TABLE 103	SAUDI ARABIA: ASSURED PNT MARKET, BY PLATFORM, 2022-2027 (USD MILLION)	134
TABLE 104	SAUDI ARABIA: ASSURED PNT MARKET, BY END USER, 2019-2021 (USD MILLION)	134
TABLE 105	SAUDI ARABIA: ASSURED PNT MARKET, BY END USER, 2022-2027 (USD MILLION)	134
10.6.4	ISRAEL	134
10.6.4.1	Military modernization programs and development of defense capabilities in focus	134
TABLE 106	ISRAEL: ASSURED PNT MARKET, BY PLATFORM, 2019-2021 (USD MILLION)	135
TABLE 107	ISRAEL: ASSURED PNT MARKET, BY PLATFORM, 2022-2027 (USD MILLION)	135
TABLE 108	ISRAEL: ASSURED PNT MARKET, BY END USER, 2019-2021 (USD MILLION)	135

TABLE 109	ISRAEL: ASSURED PNT MARKET, BY END USER, 2022-2027 (USD MILLION)	135
10.6.5	SOUTH AFRICA	136
10.6.5.1	Need for advanced systems to mitigate spoofing and jamming threats	136
TABLE 110	SOUTH AFRICA: ASSURED PNT MARKET, BY PLATFORM, 2019-2021 (USD MILLION)	136
TABLE 111	SOUTH AFRICA: ASSURED PNT MARKET, BY PLATFORM, 2022-2027 (USD MILLION)	136
TABLE 112	SOUTH AFRICA: ASSURED PNT MARKET, BY END USER, 2019-2021 (USD MILLION)	136
TABLE 113	SOUTH AFRICA: ASSURED PNT MARKET, BY END USER, 2022-2027 (USD MILLION)	137
10.6.6	REST OF MIDDLE EAST & AFRICA	137
TABLE 114	REST OF MIDDLE EAST & AFRICA: ASSURED PNT MARKET, BY PLATFORM, 2019-2021 (USD MILLION)	137
TABLE 115	REST OF MIDDLE EAST & AFRICA: ASSURED PNT MARKET, BY PLATFORM, 2022-2027 (USD MILLION)	137
TABLE 116	REST OF MIDDLE EAST & AFRICA: ASSURED PNT MARKET, BY END USER, 2019-2021 (USD MILLION)	138
TABLE 117	REST OF MIDDLE EAST & AFRICA: ASSURED PNT MARKET, BY END USER, 2022-2027 (USD MILLION)	138
10.7	LATIN AMERICA	138
10.7.1	RECESSION IMPACT ANALYSIS: LATIN AMERICA	138
FIGURE 32	ASSURED PNT MARKET: LATIN AMERICA SNAPSHOT	139
TABLE 118	LATIN AMERICA: ASSURED PNT MARKET, BY PLATFORM, 2019-2021 (USD MILLION)	140
TABLE 119	LATIN AMERICA: ASSURED PNT MARKET, BY PLATFORM, 2022-2027 (USD MILLION)	140
TABLE 120	LATIN AMERICA: ASSURED PNT MARKET, BY END USER, 2019-2021 (USD MILLION)	140
TABLE 121	LATIN AMERICA: ASSURED PNT MARKET, BY END USER, 2022-2027 (USD MILLION)	140
TABLE 122	LATIN AMERICA: ASSURED PNT MARKET, BY COUNTRY, 2019-2021 (USD MILLION)	141
TABLE 123	LATIN AMERICA: ASSURED PNT MARKET, BY COUNTRY, 2022-2027 (USD MILLION)	141
10.7.2	BRAZIL	141
10.7.2.1	Focus on strengthening border monitoring capabilities	141
TABLE 124	BRAZIL: ASSURED PNT MARKET, BY PLATFORM, 2019-2021 (USD MILLION)	141
TABLE 125	BRAZIL: ASSURED PNT MARKET, BY PLATFORM, 2022-2027 (USD MILLION)	142
TABLE 126	BRAZIL: ASSURED PNT MARKET, BY END USER, 2019-2021 (USD MILLION)	142
TABLE 127	BRAZIL: ASSURED PNT MARKET, BY END USER, 2022-2027 (USD MILLION)	142
10.7.3	MEXICO	142
10.7.3.1	Increasing defense spending to fight organized crime	142
TABLE 128	MEXICO: ASSURED PNT MARKET, BY PLATFORM, 2019-2021 (USD MILLION)	142
TABLE 129	MEXICO: ASSURED PNT MARKET, BY PLATFORM, 2022-2027 (USD MILLION)	143
TABLE 130	MEXICO: ASSURED PNT MARKET, BY END USER, 2019-2021 (USD MILLION)	143
TABLE 131	MEXICO: ASSURED PNT MARKET, BY END USER, 2022-2027 (USD MILLION)	143
11	COMPETITIVE LANDSCAPE	144
11.1	INTRODUCTION	144
TABLE 132	KEY DEVELOPMENTS BY LEADING MARKET PLAYERS BETWEEN 2018 AND 2022	144
11.2	REVENUE ANALYSIS OF KEY MARKET PLAYERS, 2021	146
FIGURE 33	REVENUE ANALYSIS OF KEY COMPANIES IN LAST FIVE YEARS	146
11.3	MARKET SHARE ANALYSIS	146
FIGURE 34	ASSURED PNT: MARKET SHARE ANALYSIS, 2021	147
TABLE 133	ASSURED PNT MARKET: DEGREE OF COMPETITION	147
11.4	COMPANY EVALUATION QUADRANT	149
11.4.1	ASSURED PNT MARKET COMPETITIVE LEADERSHIP MAPPING	149
FIGURE 35	ASSURED PNT MARKET (GLOBAL) COMPANY EVALUATION MATRIX, 2021	149
11.4.1.1	Stars	150
11.4.1.2	Pervasive Players	150
11.4.1.3	Emerging Leaders	150

11.4.1.4	Participants	150
11.4.1.5	COMPETITIVE BENCHMARKING	151
TABLE 134	COMPANY FOOTPRINT	151
TABLE 135	COMPANY END USER FOOTPRINT	152
TABLE 136	COMPANY PLATFORM FOOTPRINT	152
TABLE 137	COMPANY REGION FOOTPRINT	153
11.5	COMPETITIVE SCENARIO AND TRENDS	154
11.5.1	PRODUCT LAUNCHES	154
TABLE 138	ASSURED PNT MARKET: PRODUCT LAUNCHES, 2018-2022	154
11.5.2	DEALS	156
TABLE 139	ASSURED PNT MARKET: DEALS, 2018-2022	156
12	COMPANY PROFILES	161
(Business Overview, Products/Solutions/Services Offered, Recent Developments, MnM view (Key strengths/Right to win, Strategic choices made, Weakness/competitive threats)*		
12.1	INTRODUCTION	161
12.2	KEY PLAYERS	161
12.2.1	BAE SYSTEMS PLC	161
TABLE 140	BAE SYSTEMS PLC: BUSINESS OVERVIEW	162
FIGURE 36	BAE SYSTEMS PLC: COMPANY SNAPSHOT	162
TABLE 141	BAE SYSTEMS PLC: PRODUCT LAUNCHES	163
TABLE 142	BAE SYSTEMS PLC: DEALS	164
12.2.2	GENERAL DYNAMICS CORPORATION	167
TABLE 143	GENERAL DYNAMICS CORPORATION: BUSINESS OVERVIEW	167
FIGURE 37	GENERAL DYNAMICS CORPORATION: COMPANY SNAPSHOT	168
12.2.3	LEONARDO DRS	170
TABLE 144	LEONARDO DRS: BUSINESS OVERVIEW	170
FIGURE 38	LEONARDO S.P.A.: COMPANY SNAPSHOT	171
TABLE 145	LEONARDO DRS: PRODUCT LAUNCHES	172
12.2.4	LOCKHEED MARTIN CORPORATION	173
TABLE 146	LOCKHEED MARTIN CORPORATION: BUSINESS OVERVIEW	173
FIGURE 39	LOCKHEED MARTIN CORPORATION: COMPANY SNAPSHOT	174
TABLE 147	LOCKHEED MARTIN CORPORATION: DEALS	175
12.2.5	NORTHROP GRUMMAN CORPORATION	177
TABLE 148	NORTHROP GRUMMAN CORPORATION: BUSINESS OVERVIEW	177
FIGURE 40	NORTHROP GRUMMAN CORPORATION: COMPANY SNAPSHOT	178
TABLE 149	NORTHROP GRUMMAN CORPORATION: DEALS	179
12.2.6	RAYTHEON TECHNOLOGIES CORPORATION	180
TABLE 150	RAYTHEON TECHNOLOGIES CORPORATION: BUSINESS OVERVIEW	180
FIGURE 41	RAYTHEON TECHNOLOGIES CORPORATION: COMPANY SNAPSHOT	181
TABLE 151	RAYTHEON TECHNOLOGIES CORPORATION: PRODUCT LAUNCHES	182
TABLE 152	RAYTHEON TECHNOLOGIES CORPORATION: DEALS	182
12.2.7	THALES GROUP	184
TABLE 153	THALES GROUP: BUSINESS OVERVIEW	184
FIGURE 42	THALES GROUP: COMPANY SNAPSHOT	185
12.2.8	L3HARRIS TECHNOLOGIES	186
TABLE 154	L3HARRIS TECHNOLOGIES: BUSINESS OVERVIEW	186
FIGURE 43	L3HARRIS TECHNOLOGIES: COMPANY SNAPSHOT	187

TABLE 155	L3HARRIS TECHNOLOGIES: DEALS	188
12.2.9	HEXAGON AB	189
TABLE 156	HEXAGON AB: BUSINESS OVERVIEW	189
FIGURE 44	HEXAGON AB: COMPANY SNAPSHOT	190
TABLE 157	HEXAGON AB: PRODUCT LAUNCHES	191
12.2.10	ISRAEL AEROSPACE INDUSTRIES	192
TABLE 158	ISRAEL AEROSPACE INDUSTRIES: BUSINESS OVERVIEW	192
FIGURE 45	ISRAEL AEROSPACE INDUSTRIES: COMPANY SNAPSHOT	193
12.2.11	SPIRENT COMMUNICATIONS	194
TABLE 159	SPIRENT COMMUNICATIONS: BUSINESS OVERVIEW	194
FIGURE 46	SPIRENT COMMUNICATIONS: COMPANY SNAPSHOT	195
TABLE 160	SPIRENT COMMUNICATIONS: PRODUCT LAUNCHES	196
TABLE 161	SPIRENT COMMUNICATIONS: DEALS	196
12.2.12	RHEINMETALL AG	197
TABLE 162	RHEINMETALL AG: BUSINESS OVERVIEW	197
FIGURE 47	RHEINMETALL AG: COMPANY SNAPSHOT	198
TABLE 163	RHEINMETALL AG: DEALS	198
12.2.13	COBHAM LTD.	199
TABLE 164	COBHAM LTD.: BUSINESS OVERVIEW	199
TABLE 165	COBHAM LTD.: DEALS	200
12.2.14	CURTISS-WRIGHT CORPORATION	201
TABLE 166	CURTISS-WRIGHT CORPORATION: BUSINESS OVERVIEW	201
FIGURE 48	CURTISS-WRIGHT CORPORATION: COMPANY SNAPSHOT	202
12.2.15	OROLIA	203
TABLE 167	OROLIA: BUSINESS OVERVIEW	203
TABLE 168	OROLIA: DEALS	204
12.2.16	HONEYWELL INTERNATIONAL, INC.	205
TABLE 169	HONEYWELL INTERNATIONAL, INC.: BUSINESS OVERVIEW	205
FIGURE 49	HONEYWELL INTERNATIONAL, INC.: COMPANY SNAPSHOT	205
Details on Business Overview, Products/Solutions/Services Offered, Recent Developments, MnM view (Key strengths/Right to win, Strategic choices made, Weakness/competitive threats) might not be captured in case of unlisted companies.		
13	APPENDIX	207
13.1	DISCUSSION GUIDE	207
13.2	KNOWLEDGESTORE: MARKETSandMARKETS	SUBSCRIPTION PORTAL 209
13.3	CUSTOMIZATION OPTIONS	211
13.4	RELATED REPORTS	211
13.5	AUTHOR DETAILS	212

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Assured PNT Market by Platform (Fighter Aircraft, Military helicopters, unmanned Vehicles, Combat Vehicles, Soldiers, Submarines, Corvettes, Destroyers, and Frigates), End User (Defense, Homeland Security), Component and Region - Global forecast to 2027

Market Report | 2023-03-13 | 206 pages | MarketsandMarkets

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User	\$4950.00
	Multi User	\$6650.00
	Corporate License	\$8150.00
	Enterprise Site License	\$10000.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	2025-05-05
		Signature	<div></div>