

## **Mobile Mapping Systems - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029**

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### **Report description:**

The Mobile Mapping Systems Market size is estimated at USD 42.54 billion in 2024, and is expected to reach USD 105.09 billion by 2029, growing at a CAGR of 19.83% during the forecast period (2024-2029).

The rapid acceptance of satellite mapping technology and its seamless integration into smartphones and Internet of Things (IoT)-connected devices are driving the market's growth.

Smart cities rapidly expanded due to increased urbanization and supported government initiatives worldwide. A smart city can only exist with a 3D map. With the support of 3D city modeling, autonomous navigation, traffic, disaster management, digitizing roadway property, and pollution reduction, mobile mapping technology for smart cities aims to improve quality of life by optimizing resources and maintaining sustainability. Smartphone and internet usage played critical roles in data management and access.

Further, mobile navigation geographic information system (GIS) for environmental monitoring is increasingly used in monitoring the environment. Environmental researchers are employing mobile mapping GIS tools to help with storm and hurricane forecasting and monitoring. The NASA-funded research project on ecological monitoring and natural resource management drives revenue growth in the mobile mapping sector.

Mobile mapping systems are used for various applications, including developing indoor maps for pedestrian navigation, high-definition (HD) maps for autonomous vehicles, asset and infrastructure management, ariel surveys, pipeline surveys, hydrographic surveys, dredging, and offshore positioning/drilling operations.

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The emergence of on-demand deployment systems is an inflection point in the mobile mapping market, as high levels of flexibility and accuracy at low initial costs are offered (users are charged on a monthly/quarterly basis). Companies offer subscription-based models to counter the need for perpetual user licenses.

The COVID-19 pandemic resulted in a rapid restructuring of the IT industry, with firms shifting to remote labor. During the pandemic, the mobile mapping market grew considerably. Several businesses and agencies used mobile mapping data for visualization and geospatial analytics to restrict the spread of the disease. Dashboards were used to display geospatial data. Some of these dashboards and applications received data changes in near-real time.

## Mobile Mapping Systems Market Trends

### Imaging Services Segment to Dominate the Market

- Satellite imagery and GIS systems enable security and law enforcement agencies to identify hot spots and other trends and patterns for crime mapping. Accurate detection of spatial concentrations of crime and timely mapping of crime locations help law enforcement identify the concentration of crimes in space and time, thus providing important information for crime reduction efforts.
- Such imagery helps provide efficiency and speed of analysis in this application, allowing analysts to overlay other datasets, such as census demographics and locations of stores, banks, and schools. This helps security department administrators understand the underlying causes of crime and devise strategies. These strategies include allocating police officers and dispatching them to emergencies.
- However, there is an increase in demand for advanced remote sensing techniques, which can provide color and panchromatic image processing services along with the ability to sharpen the image with data fusion, enhancements, georeferencing, mosaicing, and color and grayscale balancing.
- Furthermore, current developments in the market studied aim to monitor water bodies. For instance, the challenge of illegal fishing and trafficking led to the need to find anomalies in the oceans. According to Nature Ecology & Evolution researchers, illegal fishing may constitute up to 30% of the total fisheries in some regions, such as the western and central Pacific oceans.
- The Food and Agriculture Organization of the United Nations (FAO) statistics highlight the global impact of unreported and unregulated (IUU) fishing. Global IUU fishing is estimated to represent up to 26 million metric tons of fish caught annually (equivalent to USD 10 billion-USD 23 billion). DigitalGlobe and Planet collaborated on one such project to identify illicit activities. The partnership aims to spot illegal transshipments of fisheries.

### Asia Pacific to Register Fastest Growth

- The market in Asia-Pacific is expected to expand at a significant rate during the forecast period. Increasing government initiatives for satellite imaging are attracting investment from foreign and domestic players, along with product launches, which are driving the market's growth in the region.
- In March 2022, Emesent, an Australia-based independent drone mapping business, announced the release of its latest Hovermap ST autonomous drone LiDAR mapping and surveying payload. Emesent's LiDAR payloads use a technology known as simultaneous localization and mapping (SLAM), in which a drone produces a map while simultaneously localizing itself inside that map.
- The fast GDP expansion in Asia-Pacific countries led to infrastructure modernization programs such as mass public transit networks and innovative city projects, increasing demand for mobile mapping technologies.
- Yinchuan, China, is one of the region's most advanced smart cities, with practically all infrastructure linked into a single system. For instance, the Fonda platform used in Yinchuan smart city combines a 3D map to locate the nodes and lamps in the latest map

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and integrates various other applications. Moreover, market players in the region are launching innovative solutions.

- For instance, in June 2022, Grab Holdings Limited announced the introduction of GrabMaps. This new enterprise solution enables the firm to capitalize annually on the USD 1.0 billion market potential for mapping and location-based services in Southeast Asia. GrabMaps was first established for internal usage to answer Grab's demand for a more hyperlocal solution to power its operations.
- Rapid mobile device manufacturing has significantly decreased the cost of scanners, cameras, and other components, making location-based services more affordable for SMEs and private individuals.

## Mobile Mapping Systems Industry Overview

The growing presence of big players in the mobile mapping industry is expected to intensify competitive rivalry during the forecast period. Incumbents, such as Google Inc., Javad GNSS Inc., Mitsubishi Corporation, Trimble, and Topcon Corporation. Large companies are expending significant resources on R&D operations to protect their position and drive innovation in the market. High barriers to exit, growing levels of firm concentration, and market penetration are some of the significant characteristics influencing the competition in the market. Overall, the intensity of competitive rivalry remains moderately high, mainly driven by the strong presence of players involved in the market studied.

In September 2022, Drivewyze, the connected truck services provider and operator of North America's largest public-private weigh station bypass network, announced real-time, in-cab traffic alerts in collaboration with INRIX, a transportation analytics and connected vehicle services provider, and the Pennsylvania Turnpike Commission. Pennsylvania joins Ohio, New Jersey, and North Carolina in providing in-state alerts that offer audio and visual indicators of upcoming traffic delays, congestion, and incidents.

In May 2022, Leica Geosystems, part of Hexagon, announced the introduction of the reality capture mobile mapping system Leica Pegasus TRK, introducing artificial intelligence, autonomous workflows, and long-range mobile mapping for applications in asset management, road construction, critical infrastructure, oil, gas, and electricity industries. The system is ideal for creating high-definition base maps for autonomous vehicles.

### Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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