

**Geospatial Intelligence Market by GeoAI (Agentic GIS, Model Catalogs), Geospatial Analytics (Traditional GIS Solutions, Location Intelligence, Data Processing & ETL), Acquisition Systems (PNT, GNSS), Technology (Raster, Imagery Analytics) - Global Forecast to 2030**

Market Report | 2026-01-12 | 521 pages | MarketsandMarkets

**AVAILABLE LICENSES:**

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

**Report description:**

The geospatial intelligence (GeoAI) market is projected to grow from USD 37.13 billion in 2025 to USD 62.88 billion by 2030, at a CAGR of 11.1% during the forecast period. Market growth is driven by the increasing use of artificial intelligence and machine learning to analyze complex geospatial datasets generated from satellites, drones, sensors, and connected devices. Organizations across defense, infrastructure, healthcare, and environmental monitoring are adopting geospatial intelligence solutions to enhance decision-making, risk assessment, and operational efficiency. Advancements in cloud computing, data fusion, and real-time analytics are improving the scalability and accessibility of geospatial intelligence platforms. In parallel, growing investments in smart infrastructure, public safety, and climate resilience initiatives are further strengthening demand for advanced GeoAI capabilities.

<https://mnmimg.marketsandmarkets.com/Images/geospatial-intelligence-market-img-overview.webp>

"Sensing and capture segment, by offering, is projected to grow at the highest CAGR during the forecast period." Sensing and capture represent the fastest-growing segment within geospatial acquisition systems in the geospatial intelligence (GeoAI) market. This segment includes satellites, aerial platforms, drones, LiDAR systems, and ground-based sensors used to collect geospatial data. Growth is driven by the expanding deployment of earth observation satellites, the increased use of unmanned aerial systems, and the demand for high-frequency data collection. These acquisition systems provide the foundational data required for downstream geospatial intelligence and analytics. Continuous improvements in sensor resolution, coverage, and

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

cost efficiency are driving the acceleration of adoption across various use cases, including defense, infrastructure monitoring, environmental assessment, and disaster response.

"Imagery data segment is expected to hold the largest share of the geospatial intelligence (GeoAI) market."

Imagery data represents the largest data type segment in the geospatial intelligence (GeoAI) market. Satellite and aerial imagery are widely used for surveillance, mapping, change detection, and asset monitoring applications. High-resolution imagery supports AI-driven feature extraction, object recognition, and predictive spatial analysis across multiple sectors. Continuous improvements in image resolution, revisit rates, and analytics capabilities are enhancing the value of imagery-based intelligence. Strong adoption across defense, urban planning, environmental monitoring, and commercial applications sustains the dominant position of the imagery data segment.

"North America to lead the geospatial intelligence (GeoAI) market, while Asia Pacific emerges as the fastest-growing region."

North America is expected to hold the largest share of the geospatial intelligence (GeoAI) market during the forecast period. The region benefits from strong adoption across defense, public safety, infrastructure, and healthcare applications, supported by sustained government spending and a mature geospatial technology ecosystem. Widespread use of satellite imagery, geospatial analytics, and AI-enabled intelligence platforms across federal agencies and enterprises drives market leadership. The presence of major geospatial technology providers and cloud service platforms further accelerates deployment.

Asia Pacific is projected to register the highest growth rate in the geospatial intelligence (GeoAI) market. Rapid urbanization, increasing investments in smart city initiatives, and the expansion of earth observation programs across countries such as China, India, and Southeast Asian nations are driving the adoption. Governments in the region are leveraging geospatial intelligence for infrastructure development, environmental monitoring, and disaster management. The growing availability of satellite data and improving analytics capabilities position the Asia Pacific as a key growth region over the forecast period.

#### Breakdown of primaries

In-depth interviews were conducted with Chief Executive Officers (CEOs), innovation and technology directors, system integrators, and executives from various key organizations operating in the geospatial intelligence (GeoAI) market.

-□By Company: Tier 1 - 35%, Tier 2 - 45%, and Tier 3 - 20%

-□By Designation: C-level Executives - 35%, D-level Executives - 25%, and Others - 40%

-□By Region: North America - 40%, Europe - 25%, Asia Pacific - 20%, Middle East & Africa - 10%, and Latin America - 5%

The report includes the study of key players offering geospatial intelligence solutions and services. It profiles major vendors in the geospatial intelligence (GeoAI) market. The major players in the s market include Google (US), IBM (US), Alteryx (US), ESRI (US), Hexagon AB (Sweden), TomTom (Netherlands), Trimble (US), Ouster (US), Vantor (US), Lanteris Space Systems (US), Precisely (US), Caliper Corporation (US), RMSI (India), MapLarge (US), General Electric (US), Airbus (France), Fugro (Netherlands), Planet Labs (US), Microsoft (US), CGI (Canada), Teledyne Technologies (Canada), Bentley Systems (US), Here Technologies (US), NVS Geospatial (US), AWS (US), SBL (India), BAE Systems (UK), ECS (US), Vexcel Imaging (Austria), Mapbox (US), EOS Data Analytics (US), Magnasoft (India), EarthDaily Analytics (Canada), Mapidea (Portugal), Geospin (Germany), Sparkgeo (Canada), Mapular (New Zealand), Carto (US), Blue Sky Analytics (Netherlands), Latitudo40 (Italy), Ecopia AI (Canada), Spatial AI (US), Dista (US), Capella Space (US), Whereobots (US), Geowgs84.ai (US), and Europa Technologies (UK).

#### Research coverage

This research report covers the geospatial intelligence (GeoAI) market and is segmented by offering, core technology architecture, data type, and vertical. The offering segment comprises software, geospatial acquisition systems, and services. The software segment contains GeoAI & ML platforms (agentic GIS & AI copilot, GeoAI cloud-native platform, GeoAI model catalogs, and others), geospatial analytics (traditional GIS solutions [desktop GIS, web/enterprise GIS, spatial databases, 3D/4D mapping tools), location intelligence (spatial query & indexing engines, geospatial visualization engines, location enrichment tools, and spatial apis & microservices), and data processing & ETL (geocoding engines, spatial data integration tools, raster/vector/crs data conversion). The geospatial acquisition systems segment is divided into sensing & capture (satellite imaging sensors, aerial cameras, and LIDAR/3D scanners) and positioning & tracking (GNSS receivers [RTK/PPP], inertial measurement units [IMU], and PNT [position, navigation, and timing] systems). The services segment comprises core services (consulting, deployment & integration, custom app development, training & enablement, and data integration services) and managed services. The core technology architecture segment covers vector & GIS analytics (geometric analysis, spatial statistics, network analysis), raster & imagery analytics

**Scotts International. EU Vat number: PL 6772247784**

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

www.scotts-international.com

(satellite/aerial image processing, computer vision, spectral analysis), streaming & real-time analytics (live data processing, event detection, dynamic optimization) and geovisualization (dashboard & reporting, thematic mapping, 3D/AR/VR overlays). The data type segment covers Imagery Data (satellite imagery, aerial/UAV imagery, hyperspectral data, SAR data), non-imagery data (vector data, 3D spatial data, crowd-sourced data, LiDAR data), and geotemporal & fusion (sensor/IoT data, social media geotagged data, mobile device location data). the application segment covers asset monitoring & management, risk assessment & modeling, precision agriculture, disaster management & response, urban planning & digital twins, surveillance & security, supply-chain & route optimization, and environmental & climate monitoring. The vertical segment is split into energy & utilities, government & defense, telecommunications, insurance & financial services, real estate & construction, automotive & transportation, healthcare & life sciences, mining, agriculture, and other verticals (including retail & e-commerce, media & entertainment, education, and tourism). The regional analysis of the geospatial intelligence (GeoAI) market covers North America, Europe, Asia Pacific, the Middle East & Africa (MEA), and Latin America.

### Key Benefits of Buying the Report

The report would provide the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall geospatial intelligence (GeoAI) market and its subsegments. It would help stakeholders understand the competitive landscape and gain more insights to better position their business and plan suitable go-to-market strategies. It also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

The report provides insights into the following pointers:

□ Analysis of key drivers (compression of decision timelines across security, infrastructure, and commercial operations, proliferation of persistent earth observation and location-aware data sources, expansion of geospatial intelligence beyond defense into civilian and commercial decision-making, rising importance of spatial context for predictive and anticipatory intelligence), restraints (managing regulatory constraints and cross-border data controls, infrastructure and network constraints limiting real-time geospatial intelligence adoption), opportunities (unlocking new value with geo foundation models and transfer learning pipelines, scaling enterprise trust through data fusion and provenance services, delivering verticalized, compliance-aligned geospatial intelligence platforms, monetizing predictive geospatial intelligence through operational integration), and challenges (maintaining high-quality labels and validation at operational scale, enabling secure multi-party geospatial collaboration and federated analytics)

□ Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the geospatial intelligence (GeoAI) market

□ Market Development: Comprehensive information about lucrative markets; the report analyzes the geospatial intelligence (GeoAI) market across varied regions

□ Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the geospatial intelligence (GeoAI) market

□ Competitive Assessment: In-depth assessment of market shares, growth strategies and service offerings of leading players like Google (US), IBM (US), Alteryx (US), ESRI (US), Hexagon AB (Sweden), TomTom (Netherlands), Trimble (US), Ouster (US), Vantor (US), Lanteris Space Systems (US), Precisely (US), Caliper Corporation (US), RMSI (India), MapLarge (US), General Electric (US), Airbus (France), Fugro (Netherlands), Planet Labs (US), Microsoft (US), CGI (Canada), Teledyne Technologies (Canada), Bentley Systems (US), Here Technologies (US), NVS Geospatial (US), AWS (US), SBL (India), BAE Systems (UK), ECS (US), Vexcel Imaging (Austria), Mapbox (US), EOS Data Analytics (US), Magnasoft (India), EarthDaily Analytics (Canada), Mapidea (Portugal), Geospin (Germany), Sparkgeo (Canada), Mapular (New Zealand), Carto (US), Blue Sky Analytics (Netherlands), Latitudo40 (Italy), Ecopia AI (Canada), Spatial AI (US), Dista (US), Capella Space (US), Wherobots (US), Geowgs84.ai (US), and Europa Technologies (UK) among others in the geospatial intelligence (GeoAI) market. The report also helps stakeholders understand the pulse of the Geospatial Intelligence (GeoAI) market, providing them with information on key market drivers, restraints, challenges, and opportunities.

### Table of Contents:

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

1	INTRODUCTION	48
1.1	STUDY OBJECTIVES	48
1.2	MARKET DEFINITION	48
1.2.1	INCLUSIONS AND EXCLUSIONS	49
1.3	MARKET SCOPE	50
1.3.1	MARKET SEGMENTATION	50
1.3.2	STUDY YEARS CONSIDERED	51
1.4	CURRENCY CONSIDERED	51
1.5	STAKEHOLDERS	51
1.6	SUMMARY OF CHANGES	52
2	EXECUTIVE SUMMARY	54
2.1	MARKET HIGHLIGHTS AND KEY INSIGHTS	54
2.2	KEY MARKET PARTICIPANTS: MAPPING OF STRATEGIC DEVELOPMENTS	56
2.3	DISRUPTIVE TRENDS IN GEOSPATIAL INTELLIGENCE (GEOAI) MARKET	57
2.4	HIGH-GROWTH SEGMENTS	58
2.5	REGIONAL SNAPSHOT: MARKET SIZE, GROWTH RATE, AND FORECAST	59
3	PREMIUM INSIGHTS	60
3.1	ATTRACTIVE OPPORTUNITIES IN GEOSPATIAL INTELLIGENCE (GEOAI) MARKET	60
3.2	GEOSPATIAL INTELLIGENCE (GEOAI) MARKET: TOP THREE APPLICATIONS	61
3.3	NORTH AMERICA: GEOSPATIAL INTELLIGENCE (GEOAI) MARKET, BY OFFERING AND END USER	61
3.4	GEOSPATIAL INTELLIGENCE (GEOAI) MARKET, BY REGION	62
4	MARKET OVERVIEW	63
4.1	INTRODUCTION	63
4.2	MARKET DYNAMICS	63
4.2.1	DRIVERS	64
4.2.1.1	Compression of decision timelines across security, infrastructure, and commercial operations	64
4.2.1.2	Proliferation of persistent Earth observation and location-aware data sources	65
4.2.1.3	Expansion of geospatial intelligence beyond defense into civilian and commercial decision-making	65
4.2.1.4	Rising importance of spatial context for predictive and anticipatory intelligence	65
4.2.2	RESTRAINTS	66
4.2.2.1	Managing regulatory constraints and cross-border data controls	66
4.2.2.2	Infrastructure and network constraints limiting real-time geospatial intelligence adoption	66
4.2.3	OPPORTUNITIES	67
4.2.3.1	Unlocking new value with geo foundation models and transfer learning pipelines	67
4.2.3.2	Scaling enterprise trust through data fusion and provenance services	67
4.2.3.3	Delivering verticalized, compliance-aligned geospatial intelligence platforms	68
4.2.3.4	Monetizing predictive geospatial intelligence through operational integration	68
4.2.4	CHALLENGES	69
4.2.4.1	Maintaining high-quality labels and validation at operational scale	69
4.2.4.2	Enabling secure multi-party geospatial collaboration and federated analytics	69
4.3	UNMET NEEDS AND WHITE SPACES	70
4.3.1	UNMET NEEDS IN GEOSPATIAL INTELLIGENCE (GEOAI) MARKET	70
4.3.2	WHITE SPACE OPPORTUNITIES	70
4.4	INTERCONNECTED MARKETS AND CROSS-SECTOR OPPORTUNITIES	71
4.4.1	INTERCONNECTED MARKETS	71
4.4.2	CROSS-SECTOR OPPORTUNITIES	72
4.5	STRATEGIC MOVES BY TIER-1/2/3 PLAYERS	73

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

4.5.1	STRATEGIC MOVES BY TIER-1/2/3 PLAYERS	73
5	INDUSTRY TRENDS	74
5.1	EVOLUTION OF GEOSPATIAL INTELLIGENCE (GEOAI)	74
5.2	PORTER'S FIVE FORCES ANALYSIS	76
5.2.1	THREAT OF NEW ENTRANTS	77
5.2.2	THREAT OF SUBSTITUTES	77
5.2.3	BARGAINING POWER OF SUPPLIERS	77
5.2.4	BARGAINING POWER OF BUYERS	77
5.2.5	INTENSITY OF COMPETITIVE RIVALRY	78
5.3	MACROECONOMIC OUTLOOK	78
5.3.1	INTRODUCTION	78
5.3.2	GDP TRENDS AND FORECAST	78
5.3.3	TRENDS IN GLOBAL BIG DATA AND ANALYTICS INDUSTRY	80
5.3.4	TRENDS IN GLOBAL CYBERSECURITY INDUSTRY	80
5.4	SUPPLY CHAIN ANALYSIS	81
5.5	ECOSYSTEM ANALYSIS	83
5.5.1	GEOSPATIAL ACQUISITION SYSTEM PROVIDERS	85
5.5.1.1	Sensing & capture providers	85
5.5.1.2	Positioning & tracking providers	86
5.5.2	SOFTWARE PROVIDERS	86
5.5.2.1	Location intelligence providers	86
5.5.2.2	Traditional GIS providers	86
5.5.2.3	Data processing & ETL providers	86
5.5.2.4	GeoAI & ML platform providers	86
5.5.3	SERVICE PROVIDERS	87
5.5.3.1	Core services	87
5.5.3.1.1	Consulting services	87
5.5.3.1.2	Data integration services	87
5.5.3.2	Managed services	87
5.6	PRICING ANALYSIS	87
5.6.1	AVERAGE SELLING PRICE OF OFFERINGS (GEOSPATIAL ACQUISITION SYSTEMS), BY KEY PLAYER, 2025	89
5.6.2	AVERAGE SELLING PRICE OF SOFTWARE AND SERVICES, 2025	89
5.7	TRADE ANALYSIS	91
5.7.1	IMPORT SCENARIO (HS CODE 9015)	91
5.7.2	EXPORT SCENARIO (HS CODE 9015)	93
5.8	KEY CONFERENCES AND EVENTS, 2025-2026	94
5.9	TRENDS/DISRUPTIONS IMPACTING CUSTOMER BUSINESS	95
5.10	INVESTMENT AND FUNDING SCENARIO	96
5.11	CASE STUDY ANALYSIS	97
5.11.1	CGI AND BELL CANADA TRANSFORM NETWORK WITH ENTERPRISE GEOSPATIAL PLATFORM	97
5.11.2	WHEREBOTS AND AARDEN.AI OVERCOME SCALING CHALLENGES WITH UNIFIED GEOSPATIAL PLATFORM	98
5.11.3	SOUTH KOREA AND NV5 INTEGRATE REMOTE SENSING TO IMPROVE FOREST GHG REPORTING	98
5.11.4	SYMAPS AND MAPBOX ENHANCE LOCATION INTELLIGENCE WITH GLOBAL MOVEMENT DATA	99
5.11.5	BAJAJ FINSERV IMPLEMENTS ESRI'S GEOSPATIAL PLATFORM SOLUTION TO IMPROVE CUSTOMER SERVICE	99
5.12	IMPACT OF 2025 US TARIFF - GEOSPATIAL INTELLIGENCE (GEOAI) MARKET	100
5.12.1	INTRODUCTION	100
5.12.1.1	Tariff/trade policy updates (August-December 2025)	101

**Scotts International. EU Vat number: PL 6772247784**

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

www.scotts-international.com

5.12.2	KEY TARIFF RATES	101
5.12.3	PRICE IMPACT ANALYSIS	102
5.12.3.1	Strategic shifts and emerging trends	102
5.12.4	IMPACT ON COUNTRIES/REGIONS	103
5.12.4.1	US	103
5.12.4.2	China	104
5.12.4.3	Europe	105
5.12.4.4	Asia Pacific (excluding China)	106
5.12.5	IMPACT ON END-USE INDUSTRIES	107
5.12.5.1	Energy & utilities	107
5.12.5.2	Government & defense	107
5.12.5.3	Telecommunications	108
5.12.5.4	Insurance & financial services	108
5.12.5.5	Real estate & construction	108
5.12.5.6	Automotive & transportation	109
5.12.5.7	Healthcare & life sciences	109
5.12.5.8	Mining	109
5.12.5.9	Agriculture	109
5.12.5.10	Other verticals (retail & e-commerce, media & entertainment, education, tourism)	110
6	STRATEGIC DISRUPTION: PATENTS, DIGITAL, AND AI ADOPTIONS	111
6.1	KEY EMERGING TECHNOLOGIES	111
6.1.1	ADVANCED AI/ML TECHNIQUES	111
6.1.2	REMOTE SENSING, EO, & MULTI-SENSOR DATA FUSION	111
6.1.3	HIGH-FIDELITY 3D MAPPING & DIGITAL TWINS	111
6.1.4	CLOUD & EDGE COMPUTING	112
6.2	COMPLEMENTARY TECHNOLOGIES	112
6.2.1	INTERNET OF THINGS (IOT) & SENSOR NETWORKS	112
6.2.2	5G CONNECTIVITY	113
6.2.3	FEDERATED LEARNING (FL) & PRIVACY-PRESERVING AI	113
6.3	ADJACENT TECHNOLOGIES	113
6.3.1	SPATIAL COMPUTING	113
6.3.2	GENERATIVE AI & GEOLLMS	114
6.3.3	BLOCKCHAIN	114
6.4	TECHNOLOGY ROADMAP	114
6.4.1	SHORT TERM (2025-2027): FOUNDATION AND STANDARDIZATION PHASE	115
6.4.2	MID TERM (2028-2030): CONVERGENCE AND AUTOMATION PHASE	115
6.4.3	LONG TERM (2031-2035): AUTONOMOUS AND COGNITIVE INTEROPERABILITY PHASE	116
6.5	PATENT ANALYSIS	116
6.5.1	METHODOLOGY	116
6.5.2	PATENTS FILED, BY DOCUMENT TYPE, 2016-2025	117
6.5.3	INNOVATION AND PATENT APPLICATIONS	117
7	REGULATORY LANDSCAPE	121
7.1	REGIONAL REGULATIONS AND COMPLIANCE	121
7.1.1	REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	121
7.1.2	KEY REGULATIONS	124
7.1.2.1	North America	124
7.1.2.1.1	Geospatial Data Act (GDA) of 2018 (US)	124

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

7.1.2.1.2	Open Government Directive of 2014 (Canada)	125
7.1.2.2	Europe	125
7.1.2.2.1	INSPIRE Directive 2007/2 (European Commission)	125
7.1.2.2.2	General Data Protection Regulation (European Union)	126
7.1.2.2.3	Copernicus Regulation 2021/696 (European Union)	126
7.1.2.3	Asia Pacific	126
7.1.2.3.1	Geospatial Information Regulation Act 2016 (India)	126
7.1.2.3.2	Surveying and Mapping Law 2002, Revised 2017 (China)	127
7.1.2.3.3	Basic Act on Advancement of Utilizing Geospatial Information, 2007 (Japan)	127
7.1.2.4	Middle East & Africa	128
7.1.2.4.1	Survey and Mapping Law (Saudi Arabia)	128
7.1.2.4.2	Spatial Data Infrastructure Act 54 of 2003 (South Africa)	128
7.1.2.5	Latin America	128
7.1.2.5.1	National Geospatial Data Infrastructure (INDE) Law (Brazil)	128
7.1.2.5.2	Geospatial Data Law 2020 (Mexico)	129
7.1.3	INDUSTRY STANDARDS	129
8	CUSTOMER LANDSCAPE AND BUYER BEHAVIOR	132
8.1	DECISION-MAKING PROCESS	132
8.2	KEY STAKEHOLDERS INVOLVED IN BUYING PROCESS AND THEIR EVALUATION CRITERIA	134
8.2.1	KEY STAKEHOLDERS IN BUYING PROCESS	134
8.2.2	BUYING CRITERIA	134
8.3	ADOPTION BARRIERS AND INTERNAL CHALLENGES	135
8.4	UNMET NEEDS OF VARIOUS INDUSTRY VERTICALS	136
9	GEOSPATIAL INTELLIGENCE (GEOAI) MARKET, BY OFFERING	139
9.1	INTRODUCTION	140
9.1.1	OFFERING: GEOSPATIAL INTELLIGENCE (GEOAI) MARKET DRIVERS	140
9.2	SOFTWARE	141
9.2.1	GEOAI & ML PLATFORMS	143
9.2.1.1	Advancing intelligent spatial analysis through integrated AI-driven platform capabilities	143
9.2.1.2	Agentic GIS & AI copilot	144
9.2.1.3	GeoAI cloud-native platform	144
9.2.1.4	GeoAI model catalogs	145
9.2.1.5	Other GeoAI & ML platforms	145
9.2.2	GEOSPATIAL ANALYTICS	146
9.2.2.1	Traditional GIS Solutions	146
9.2.2.1.1	Strengthening spatial decision-making through expanding demand for foundational GIS capabilities	146
9.2.2.1.2	Desktop GIS	147
9.2.2.1.3	Web/Enterprise GIS	148
9.2.2.1.4	Spatial databases	148
9.2.2.1.5	3D/4D mapping tools	148
?		
9.2.2.2	Location intelligence (LI)	149
9.2.2.2.1	Enhancing spatial decision-making through advanced location intelligence capabilities	149
9.2.2.2.2	Spatial query & indexing engines	150
9.2.2.2.3	Geospatial visualization engines	150
9.2.2.2.4	Location enrichment tools	150
9.2.2.2.5	Spatial APIs & microservices	150

**Scotts International. EU Vat number: PL 6772247784**

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

www.scotts-international.com

9.2.2.3	Data Processing & ETL	151
9.2.2.3.1	Advancing organizational security with unified policy enforcement	151
9.2.2.3.2	Geocoding engines	152
9.2.2.3.3	Spatial data integration tools	152
9.2.2.3.4	Raster/vector/CRS data conversion	152
9.3	GEOSPATIAL ACQUISITION SYSTEMS	153
9.3.1	SENSING & CAPTURE	154
9.3.1.1	Enhancing spatial data fidelity through advanced multimodal sensing innovations	154
9.3.1.2	Satellite imaging sensors	155
9.3.1.3	Aerial cameras	156
9.3.1.4	LiDAR/3D scanners	156
9.3.2	POSITIONING & TRACKING	156
9.3.2.1	Optimizing precision movement through advanced geospatial tracking technologies	156
9.3.2.2	GNSS receivers (RTK/PPP)	157
9.3.2.3	Inertial Measurement Units (IMU)	157
9.3.2.4	PNT (Position, Navigation, Timing) systems	158
9.4	SERVICES	158
9.4.1	CORE SERVICES	160
9.4.1.1	Accelerating adoption through expert-led integration and high-quality geospatial services	160
9.4.1.2	Consulting	161
9.4.1.3	Deployment & integration	161
9.4.1.4	Custom application development	161
9.4.1.5	Training & enablement	161
9.4.1.6	Data-integration services	162
9.4.2	MANAGED SERVICES	162
9.4.2.1	Accelerating scalable geospatial readiness through continuous cloud delivery and automation	162
9.4.2.2	Data-as-a-Service (DaaS)	163
9.4.2.3	Analytics-as-a-Service (AaaS)	163
?		
10	GEOSPATIAL INTELLIGENCE (GEOAI) MARKET, BY CORE TECHNOLOGY ARCHITECTURE	164
10.1	INTRODUCTION	165
10.1.1	CORE TECHNOLOGY ARCHITECTURE: GEOSPATIAL INTELLIGENCE (GEOAI) MARKET DRIVERS	165
10.2	VECTOR & GIS ANALYTICS	166
10.2.1	ACCELERATING PRECISION MAPPING THROUGH AI-ENHANCED VECTOR ANALYSIS AND AUTOMATED GEOPROCESSING	166
10.2.2	GEOMETRIC ANALYSIS	167
10.2.3	SPATIAL STATISTICS	167
10.2.4	NETWORK ANALYSIS	168
10.3	RASTER & IMAGERY ANALYTICS	168
10.3.1	DRIVING REAL-TIME INSIGHT THROUGH AI-POWERED IMAGERY INTERPRETATION AND AUTOMATED CHANGE DETECTION	168
10.3.2	SATELLITE/AERIAL IMAGE PROCESSING	169
10.3.3	COMPUTER VISION	169
10.3.4	SPECTRAL ANALYSIS	170
10.4	STREAMING & REAL-TIME ANALYTICS	170
10.4.1	ENHANCING SITUATIONAL AWARENESS THROUGH AI-OPTIMIZED REAL-TIME GEOSPATIAL DATA PROCESSING	170
10.4.2	LIVE DATA PROCESSING	171
10.4.3	EVENT DETECTION	171
10.4.4	DYNAMIC OPTIMIZATION	172

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)



10.5	GEOVISUALIZATION	172
10.5.1	ELEVATING DECISION CLARITY THROUGH INTERACTIVE SPATIAL VISUALIZATION AND AI-DRIVEN VISUAL INSIGHTS	172
10.5.2	DASHBOARD & REPORTING	173
10.5.3	THEMATIC MAPPING	173
10.5.4	3D/AR/VR OVERLAYS	174
11	GEOSPATIAL INTELLIGENCE (GEOAI) MARKET, BY DATA TYPE	175
11.1	INTRODUCTION	176
11.1.1	DATA TYPE: GEOSPATIAL INTELLIGENCE (GEOAI) MARKET DRIVERS	176
11.2	IMAGERY DATA	177
11.2.1	ADVANCING HIGH-PRECISION INSIGHTS THROUGH INTELLIGENT UTILIZATION OF RICH IMAGERY DATA	177
11.2.2	SATELLITE IMAGERY	178
11.2.3	AERIAL/UAV IMAGERY	178
11.2.4	HYPERSPPECTRAL DATA	179
11.2.5	SAR DATA	179
	?	
11.3	NON-IMAGERY DATA	179
11.3.1	STRENGTHENING CONTEXT-AWARE DECISION INTELLIGENCE THROUGH NON-IMAGERY SPATIAL DATA UTILIZATION	179
11.3.2	VECTOR DATA	180
11.3.3	3D SPATIAL DATA	181
11.3.4	CROWD-SOURCED DATA	181
11.3.5	LIDAR DATA	181
11.4	GEOTEMPORAL & FUSION	182
11.4.1	ADVANCING PREDICTIVE INSIGHT THROUGH INTEGRATED GEOTEMPORAL ANALYSIS AND MULTIMODAL DATA FUSION	182
11.4.2	SENSOR/IOT DATA	183
11.4.3	SOCIAL MEDIA GEOTAGGED DATA	183
11.4.4	MOBILE DEVICE LOCATION DATA	183
12	GEOSPATIAL INTELLIGENCE (GEOAI) MARKET, BY APPLICATION	184
12.1	INTRODUCTION	185
12.1.1	APPLICATION: GEOSPATIAL INTELLIGENCE (GEOAI) MARKET DRIVERS	185
12.2	ASSET MONITORING & MANAGEMENT	187
12.2.1	DRIVING ASSET RELIABILITY THROUGH INTELLIGENT GEOSPATIAL MONITORING AND PREDICTIVE INSIGHT	187
12.3	RISK ASSESSMENT & MODELING	188
12.3.1	ENHANCING HAZARD FORESIGHT THROUGH INTELLIGENT GEOSPATIAL RISK MODELLING	188
12.4	PRECISION AGRICULTURE	189
12.4.1	ADVANCING FARM EFFICIENCY THROUGH INTELLIGENT GEOSPATIAL CROP OPTIMIZATION	189
12.5	DISASTER MANAGEMENT & RESPONSE	190
12.5.1	ENHANCING EMERGENCY PREPAREDNESS THROUGH ADVANCED GEOAI-DRIVEN DISASTER RESPONSE CAPABILITIES	190
12.6	URBAN PLANNING & DIGITAL TWINS	191
12.6.1	DRIVING ENTERPRISE EFFICIENCY, SECURITY, AND VISIBILITY IN SAAS OPERATIONS	191
12.7	SURVEILLANCE & SECURITY	192
12.7.1	ADVANCING THREAT DETECTION THROUGH GEOAI-ENABLED SURVEILLANCE AND SECURITY SYSTEMS	192
12.8	SUPPLY CHAIN & ROUTE OPTIMIZATION	193
12.8.1	BOOSTING LOGISTICS PERFORMANCE THROUGH GEOAI-ENABLED ROUTING AND SUPPLY CHAIN OPTIMIZATION	193
12.9	ENVIRONMENTAL & CLIMATE MONITORING	194
12.9.1	STRENGTHENING CLIMATE RESILIENCE THROUGH GEOAI-DRIVEN ENVIRONMENTAL MONITORING SYSTEMS	194
	?	
13	GEOSPATIAL INTELLIGENCE (GEOAI) MARKET, BY VERTICAL	196

**Scotts International. EU Vat number: PL 6772247784**

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

www.scotts-international.com

13.1	INTRODUCTION	197
13.1.1	VERTICAL: GEOSPATIAL INTELLIGENCE (GEOAI) MARKET DRIVERS	197
13.2	ENERGY & UTILITIES	199
13.2.1	ENHANCING GRID RESILIENCE AND ASSET INTELLIGENCE THROUGH ADVANCED SPATIAL ANALYTICS	199
13.3	GOVERNMENT & DEFENSE	200
13.3.1	STRENGTHENING NATIONAL SECURITY THROUGH AI-DRIVEN SPATIAL INTELLIGENCE AND SURVEILLANCE	200
13.4	TELECOMMUNICATION	201
13.4.1	NETWORK DENSIFICATION AND 5G EXPANSION DRIVING ADVANCED SPATIAL INTELLIGENCE ADOPTION	201
13.5	INSURANCE & FINANCIAL SERVICES	202
13.5.1	CLIMATE RISK TRANSPARENCY AND CLAIMS AUTOMATION DRIVING LOCATION-CENTRIC INTELLIGENCE ADOPTION	202
13.6	REAL ESTATE & CONSTRUCTION	203
13.6.1	RAPID URBAN DENSITY AND REGULATORY COMPLIANCE PRESSURES ACCELERATING SPATIAL INTELLIGENCE ADOPTION	203
13.7	AUTOMOTIVE & TRANSPORTATION	204
13.7.1	RISING DEMAND FOR REAL-TIME TRAFFIC OPTIMIZATION AND SMART FLEET ORCHESTRATION	204
13.8	HEALTHCARE & LIFE SCIENCES	205
13.8.1	EXPANDING PREVENTIVE CARE MODELS AND OUTBREAK PREPAREDNESS STRENGTHENING SPATIAL ANALYTICS ADOPTION	205
13.9	MINING	206
13.9.1	RISING COMMODITY DEMAND AND AUTOMATION IMPERATIVES ACCELERATING SPATIAL INTELLIGENCE INTEGRATION	206
13.10	AGRICULTURE	207
13.10.1	CLIMATE VOLATILITY AND PRECISION YIELD OPTIMIZATION ACCELERATING SPATIAL INTELLIGENCE ADOPTION	207
13.11	OTHER VERTICALS	208
14	GEOSPATIAL INTELLIGENCE (GEOAI) MARKET, BY REGION	211
14.1	INTRODUCTION	212
14.2	NORTH AMERICA	214
14.2.1	NORTH AMERICA: GEOSPATIAL INTELLIGENCE (GEOAI) MARKET DRIVERS	214
14.2.2	NORTH AMERICA: MACROECONOMIC OUTLOOK	215
14.2.3	US	221
14.2.3.1	Smart infrastructure and BIM-led digitization to accelerate location-based intelligence adoption	221
14.2.4	CANADA	226
14.2.4.1	Open data mandates and startup-driven innovation powering nationwide geospatial adoption	226
		?
14.3	EUROPE	231
14.3.1	EUROPE: GEOSPATIAL INTELLIGENCE (GEOAI) MARKET DRIVERS	232
14.3.2	EUROPE: MACROECONOMIC OUTLOOK	232
14.3.3	UK	238
14.3.3.1	Government initiatives and defense partnerships to fuel advanced location Intelligence adoption	238
14.3.4	GERMANY	243
14.3.4.1	Satellite services, smart cities, and sustainability programs to drive advanced spatial innovation	243
14.3.5	FRANCE	249
14.3.5.1	Defense modernization, smart cities, and climate missions to support adoption of AI-driven spatial intelligence	249
14.3.6	ITALY	254
14.3.6.1	Satellite analytics and smart infrastructure programs accelerating digital location capabilities	254
14.3.7	REST OF EUROPE	260
14.4	ASIA PACIFIC	266
14.4.1	ASIA PACIFIC: GEOSPATIAL INTELLIGENCE (GEOAI) MARKET DRIVERS	266
14.4.2	ASIA PACIFIC: MACROECONOMIC OUTLOOK	267

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

14.4.3	CHINA	273
14.4.3.1	Advancements in satellite technology, telecom infrastructure, and national security to drive growth	273
14.4.4	INDIA	279
14.4.4.1	Government-led geospatial policy, international collaboration, and infrastructure digitization to drive market expansion	279
14.4.5	JAPAN	284
14.4.5.1	Increase in focus on disaster management and adoption of GIS-based mapping technologies to fuel market growth	284
14.4.6	ASEAN	290
14.4.6.1	Smart cities, climate resilience, and cross-border trade to drive GeoAI adoption	290
14.4.7	REST OF ASIA PACIFIC	295
14.5	MIDDLE EAST & AFRICA	301
14.5.1	MIDDLE EAST & AFRICA: GEOSPATIAL INTELLIGENCE (GEOAI) MARKET DRIVERS	302
14.5.2	MIDDLE EAST & AFRICA: MACROECONOMIC OUTLOOK	302
14.5.3	SAUDI ARABIA	308
14.5.3.1	Vision 2030, smart cities, and space investments to propel advanced spatial intelligence growth	308
14.5.4	UAE	314
14.5.4.1	Geospatial data leveraged for projects such as Smart Dubai and Abu Dhabi's TAMM platform	314
14.5.5	TURKEY	319
14.5.5.1	Smart infrastructure modernization and disaster risk management to fuel geospatial adoption	319
	?	
14.5.6	SOUTH AFRICA	325
14.5.6.1	Mining automation, climate risk, and smart cities to fuel spatial AI adoption	325
14.5.7	REST OF MIDDLE EAST & AFRICA	330
14.6	LATIN AMERICA	336
14.6.1	LATIN AMERICA: GEOSPATIAL INTELLIGENCE (GEOAI) MARKET DRIVERS	337
14.6.2	LATIN AMERICA: MACROECONOMIC OUTLOOK	337
14.6.3	BRAZIL	342
14.6.3.1	Initiatives like National Institute for Space Research to monitor Amazon and other critical ecosystems to boost market	342
14.6.4	MEXICO	348
14.6.4.1	Strategic push for nearshoring and focus on environmental sustainability to amplify demand	348
14.6.5	REST OF LATIN AMERICA	353
15	COMPETITIVE LANDSCAPE	360
15.1	OVERVIEW	360
15.2	KEY PLAYER STRATEGIES, 2020-2025	360
15.3	REVENUE ANALYSIS, 2020-2024	362
15.4	MARKET SHARE ANALYSIS, 2024	363
15.4.1	MARKET RANKING ANALYSIS, 2024	364
15.5	BRAND COMPARATIVE ANALYSIS	366
15.5.1	BRAND COMPARATIVE ANALYSIS, BY GEOSPATIAL ACQUISITION SYSTEMS	366
15.5.1.1	Airbus (France)	367
15.5.1.2	Planet Labs (US)	367
15.5.1.3	Fugro (Netherlands)	367
15.5.1.4	Vexcel Imaging (Austria)	367
15.5.1.5	Capella Space (US)	367
15.5.2	BRAND COMPARATIVE ANALYSIS, BY GEOSPATIAL INTELLIGENCE (GEOAI) SOFTWARE	368
15.5.2.1	Google (US)	368
15.5.2.2	ESRI (US)	368

**Scotts International. EU Vat number: PL 6772247784**

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

www.scotts-international.com

15.5.2.3	Hexagon AB (Sweden)	369
15.5.2.4	TomTom (Netherlands)	369
15.5.2.5	Carto (US)	369
15.6	COMPANY EVALUATION MATRIX: KEY PLAYERS (SOFTWARE & SERVICES VENDORS)	369
15.6.1	STARS	369
15.6.2	EMERGING LEADERS	369
15.6.3	PERVASIVE PLAYERS	370
15.6.4	PARTICIPANTS	370
?		
15.6.5	COMPANY FOOTPRINT: KEY PLAYERS (SOFTWARE & SERVICES VENDORS)	371
15.6.5.1	Company footprint	371
15.6.5.2	Regional footprint	372
15.6.5.3	Offering footprint	373
15.6.5.4	Core technology architecture footprint	374
15.6.5.5	Application footprint	375
15.6.5.6	Vertical footprint	376
15.7	COMPANY EVALUATION MATRIX: KEY PLAYERS (GEOSPATIAL ACQUISITION SYSTEMS VENDORS)	377
15.7.1	STARS	377
15.7.2	EMERGING LEADERS	377
15.7.3	PERVASIVE PLAYERS	377
15.7.4	PARTICIPANTS	377
15.7.5	COMPANY FOOTPRINT: KEY PLAYERS (GEOSPATIAL ACQUISITION SYSTEMS VENDORS)	379
15.7.5.1	Company footprint	379
15.7.5.2	Regional footprint	379
15.7.5.3	Offering footprint	380
15.7.5.4	Core technology architecture footprint	380
15.7.5.5	Application footprint	381
15.7.5.6	Vertical footprint	381
15.8	COMPANY EVALUATION MATRIX: STARTUPS/SMES	382
15.8.1	PROGRESSIVE COMPANIES	382
15.8.2	RESPONSIVE COMPANIES	382
15.8.3	DYNAMIC COMPANIES	382
15.8.4	STARTING BLOCKS	383
15.8.5	COMPETITIVE BENCHMARKING: STARTUPS/SMES, 2024	384
15.8.5.1	Detailed list of key startups/SMEs	384
15.8.5.2	Competitive benchmarking of key startups/SMEs	385
15.9	COMPANY VALUATION AND FINANCIAL METRICS	386
15.10	COMPETITIVE SCENARIO	387
15.10.1	PRODUCT LAUNCHES AND ENHANCEMENTS	387
15.10.2	DEALS	388
16	COMPANY PROFILES	390
16.1	INTRODUCTION	390
16.2	KEY PLAYERS	390
16.2.1	GOOGLE	390
16.2.1.1	Business overview	390
16.2.1.2	Products/Solutions/Services offered	392
16.2.1.3	Recent developments	392

**Scotts International. EU Vat number: PL 6772247784**

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

www.scotts-international.com

16.2.1.3.1	Product launches & enhancements	392
16.2.1.3.2	Deals	394
16.2.1.4	MnM view	395
16.2.1.4.1	Key strengths	395
16.2.1.4.2	Strategic choices	395
16.2.1.4.3	Weaknesses and competitive threats	396
16.2.2	HEXAGON AB	397
16.2.2.1	Business overview	397
16.2.2.2	Products/Solutions/Services offered	398
16.2.2.3	Recent developments	400
16.2.2.3.1	Product launches & enhancements	400
16.2.2.3.2	Deals	401
16.2.2.4	MnM view	403
16.2.2.4.1	Key strengths	403
16.2.2.4.2	Strategic choices	403
16.2.2.4.3	Weaknesses and competitive threats	403
16.2.3	TOMTOM	404
16.2.3.1	Business overview	404
16.2.3.2	Products/Solutions/Services offered	405
16.2.3.3	Recent developments	406
16.2.3.3.1	Product launches & enhancements	406
16.2.3.3.2	Deals	407
16.2.3.4	MnM view	410
16.2.3.4.1	Key strengths	410
16.2.3.4.2	Strategic choices	410
16.2.3.4.3	Weaknesses and competitive threats	410
16.2.4	ALTERYX	411
16.2.4.1	Business overview	411
16.2.4.2	Products/Solutions/Services offered	411
16.2.4.3	Recent developments	412
16.2.4.3.1	Product launches & enhancements	412
16.2.4.3.2	Deals	413
16.2.4.4	MnM view	413
16.2.4.4.1	Key strengths	413
16.2.4.4.2	Strategic choices	413
16.2.4.4.3	Weaknesses and competitive threats	414
16.2.5	IBM	415
16.2.5.1	Business overview	415
16.2.5.2	Products/Solutions/Services offered	416
16.2.5.3	Recent developments	417
16.2.5.3.1	Product launches & enhancements	417
16.2.5.3.2	Deals	419
?		
16.2.5.4	MnM view	419
16.2.5.4.1	Key strengths	419
16.2.5.4.2	Strategic choices	419
16.2.5.4.3	Weaknesses and competitive threats	420

**Scotts International. EU Vat number: PL 6772247784**

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

www.scotts-international.com

16.2.6	AIRBUS	421
16.2.6.1	Business overview	421
16.2.6.2	Products/Solutions/Services offered	422
16.2.6.3	Recent developments	425
16.2.6.3.1	Product launches & enhancements	425
16.2.6.3.2	Deals	425
16.2.7	TRIMBLE	426
16.2.7.1	Business overview	426
16.2.7.2	Products/Solutions/Services offered	427
16.2.7.3	Recent developments	429
16.2.7.3.1	Product launches & enhancements	429
16.2.7.3.2	Deals	430
16.2.8	CALIPER CORPORATION	431
16.2.8.1	Business overview	431
16.2.8.2	Products/Solutions/Services offered	431
16.2.8.3	Recent developments	432
16.2.8.3.1	Product launches & enhancements	432
16.2.8.3.2	Deals	433
16.2.9	PRECISELY	434
16.2.9.1	Business overview	434
16.2.9.2	Products/Solutions/Services offered	434
16.2.9.3	Recent developments	435
16.2.9.3.1	Product launches & enhancements	435
16.2.9.3.2	Deals	436
16.2.10	ESRI	437
16.2.10.1	Business overview	437
16.2.10.2	Products/Solutions/Services offered	437
16.2.10.3	Recent developments	438
16.2.10.3.1	Product launches & enhancements	438
16.2.10.3.2	Deals	440
16.2.11	MICROSOFT	442
16.2.11.1	Business overview	442
16.2.11.2	Products/Solutions/Services offered	443
16.2.11.3	Recent developments	444
16.2.11.3.1	Product launches & enhancements	444
16.2.11.3.2	Deals	444
?		
16.2.12	BENTLEY SYSTEMS	446
16.2.12.1	Business overview	446
16.2.12.2	Products/Solutions/Services offered	447
16.2.12.3	Recent developments	448
16.2.12.3.1	Product launches	448
16.2.12.3.2	Deals	449
16.2.13	HERE TECHNOLOGIES	450
16.2.13.1	Business overview	450
16.2.13.2	Products/Solutions/Services offered	451
16.2.13.3	Recent developments	451

**Scotts International. EU Vat number: PL 6772247784**

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

www.scotts-international.com

16.2.13.3.1	Product launches and enhancements	451
16.2.13.3.2	Deals	452
16.2.14	NV5 GEOSPATIAL	454
16.2.14.1	Business overview	454
16.2.14.2	Products/Solutions/Services offered	454
16.2.14.3	Recent developments	456
16.2.14.3.1	Product launches	456
16.2.15	TELEDYNE GEOSPATIAL	457
16.2.15.1	Business overview	457
16.2.15.2	Products/Solutions/Services offered	458
16.2.15.3	Recent developments	460
16.2.15.3.1	Product launches	460
16.2.15.3.2	Deals	460
16.2.16	RMSI	461
16.2.17	LANTERIS SPACE SYSTEMS	462
16.2.18	VANTOR	463
16.2.19	MAPLARGE	464
16.2.20	BAE SYSTEMS	465
16.2.21	GENERAL ELECTRIC	466
16.2.22	FUGRO	467
16.2.23	PLANET LABS	468
16.2.24	SBL	469
16.2.25	ECS	470
16.2.26	AWS	471
16.2.27	CGI	472
16.3	STARTUPS/SMES	473
16.3.1	VEXEL IMAGING	473
16.3.2	CAPELLA SPACE	473
16.3.3	EARTHDAILY ANALYTICS	474
16.3.4	MAPIDEA	475
16.3.5	GEOSPIN (EMA SMARTSERVICE)	475
16.3.6	SPARKGEO	476
16.3.7	CARTO	476
16.3.8	MAPBOX	477
16.3.9	BLUE SKY ANALYTICS	478
16.3.10	LATITUDO40	479
16.3.11	ECOPIA.AI	480
16.3.12	SPATIAL.AI	481
16.3.13	DISTA	482
16.3.14	EOS DATA ANALYTICS	483
16.3.15	MAGNASOFT	484
16.3.16	WHEREBOTS	485
16.3.17	OUSTER	486
16.3.18	GEOWGS84.AI	487
16.3.19	EUROPA TECHNOLOGIES	488
16.3.20	MAPULAR	489
17	RESEARCH METHODOLOGY	490

**Scotts International. EU Vat number: PL 6772247784**

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

www.scotts-international.com

17.1	RESEARCH DATA	490
17.1.1	SECONDARY DATA	491
17.1.2	PRIMARY DATA	491
17.1.2.1	Breakup of primary profiles	492
17.1.2.2	Key industry insights	492
17.2	DATA TRIANGULATION	493
17.3	MARKET SIZE ESTIMATION	494
17.3.1	TOP-DOWN APPROACH	494
17.3.2	BOTTOM-UP APPROACH	494
17.4	MARKET FORECAST	498
17.5	RESEARCH ASSUMPTIONS	499
17.6	RESEARCH LIMITATIONS	501
18	ADJACENT AND RELATED MARKETS	502
18.1	INTRODUCTION	502
18.2	GEOSPATIAL IMAGERY ANALYTICS MARKET - GLOBAL FORECAST TO 2030	502
18.2.1	MARKET DEFINITION	502
18.2.2	MARKET OVERVIEW	502
18.2.2.1	Geospatial imagery analytics market, by offering	502
18.2.2.2	Geospatial imagery analytics market, by data modality	503
18.2.2.3	Geospatial imagery analytics market, by vertical	504
18.2.2.4	Geospatial imagery analytics market, by region	505
18.3	LOCATION-BASED SERVICES (LBS) AND REAL-TIME LOCATION SYSTEMS (RTLS) MARKET - GLOBAL FORECAST TO 2028	506
18.3.1	MARKET DEFINITION	506
18.3.2	MARKET OVERVIEW	507
18.3.2.1	LBS and RTLS Market, by offering	507
18.3.2.2	LBS and RTLS market, by location type	508
18.3.2.3	LBS and RTLS market, by application	509
18.3.2.4	LBS and RTLS market, by vertical	510
18.3.2.5	LBS and RTLS market, by region	511
19	APPENDIX	512
19.1	DISCUSSION GUIDE	512
19.2	KNOWLEDGESTORE: MARKETSandMARKETS' SUBSCRIPTION PORTAL	517
19.3	CUSTOMIZATION OPTIONS	519
19.4	RELATED REPORTS	519
19.5	AUTHOR DETAILS	520



**Geospatial Intelligence Market by GeoAI (Agentic GIS, Model Catalogs), Geospatial Analytics (Traditional GIS Solutions, Location Intelligence, Data Processing & ETL), Acquisition Systems (PNT, GNSS), Technology (Raster, Imagery Analytics) - Global Forecast to 2030**

Market Report | 2026-01-12 | 521 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\*

Country\*

Date

Signature