

Global Assured PNT Market Size Study & Forecast, by Platform, End User, Component, and Regional Forecasts 2025-2035

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Abstracts

The Global Assured PNT (Positioning, Navigation, and Timing) Market was valued at approximately USD 0.4 billion in 2024 and is projected to expand at an exceptional CAGR of 29.80% over the forecast period from 2025 to 2035. With the rise in electronic warfare threats, signal jamming, and spoofing attacks, the demand for resilient, anti-jam, and reliable PNT capabilities has surged to the forefront of strategic defense planning worldwide. Assured PNT systems, which integrate GPS with inertial navigation systems, timing modules, and alternative signals of opportunity, are proving instrumental in enhancing situational awareness, targeting accuracy, and overall mission assurance across airborne, land-based, and naval defense platforms.

As national defense forces move toward network-centric and precision-guided warfare, integration of Assured PNT into platforms such as fighter aircraft, unmanned vehicles, submarines, and ground-based combat systems has become imperative. This has catalyzed the adoption of advanced PNT technologies that withstand denial environments and electromagnetic interference. Additionally, homeland security and counter-terrorism efforts rely increasingly on high-assurance location data for surveillance, border security, and disaster response operations. Nevertheless, the high cost associated with cutting-edge inertial systems and the complexity of integrating multi-layered positioning architectures pose notable challenges to widespread adoption.

From a geographical standpoint, North America is set to dominate the market through 2025, driven by substantial investments in defense modernization, high military spending, and active R&D by key players including the U.S. Department of Defense. Europe is witnessing notable traction owing to NATO's increasing emphasis on GNSS independence and resilience initiatives such as the EU's Galileo PRS program.

Meanwhile, Asia Pacific is expected to emerge as the fastest-growing region, with countries like China and India rapidly scaling military capabilities and investing in indigenous positioning infrastructures and secure timing systems to reduce dependency on foreign networks, ensuring tactical sovereignty and uninterrupted command and control.

Major market player included in this report are:

BAE Systems

Northrop Grumman Corporation

Collins Aerospace

Raytheon Technologies Corporation

Safran Group

L3Harris Technologies

Honeywell International Inc.

Thales Group

Lockheed Martin Corporation

Curtiss-Wright Corporation

General Dynamics Corporation

Elbit Systems Ltd.

Leonardo S.p.A.

Cobham Ltd.

KVH Industries, Inc.

Global Assured PNT Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast period – 2025-2035

Report Coverage – Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Regional Scope – North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope – Free report customization (equivalent up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values for the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within the countries involved in the study. The report also provides detailed information about crucial aspects, such as driving factors and challenges, which will define the future growth of the market. Additionally, it incorporates potential opportunities in micro-markets for stakeholders to invest, along with a detailed analysis of the competitive landscape and product offerings of key players. The detailed segments and sub-segments of the market are explained below:

By Platform:

Fighter Aircraft

Military Helicopters

Unmanned Vehicles

Combat Vehicles

Soldiers

Submarines

Corvettes

Destroyers

Frigates

By End User:

Defense

Homeland Security

By Component:

Hardware

Software

Services

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

Rest of Europe

Asia Pacific

China

India

Japan

Australia

South Korea

Rest of Asia Pacific

Latin America

Brazil

Mexico

Middle East & Africa

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

Key Takeaways:

Market Estimates & Forecast for 10 years from 2025 to 2035.

Annualized revenues and regional level analysis for each market segment.

Detailed analysis of geographical landscape with Country level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of competitive structure of the market.

Demand side and supply side analysis of the market.

Contents

CHAPTER 1. GLOBAL ASSURED PNT MARKET REPORT SCOPE & METHODOLOGY

- 1.1. Research Objective
- 1.2. Research Methodology
 - 1.2.1. Forecast Model
 - 1.2.2. Desk Research
 - 1.2.3. Top-Down and Bottom-Up Approach
- 1.3. Research Attributes
- 1.4. Scope of the Study
 - 1.4.1. Market Definition
 - 1.4.2. Market Segmentation
- 1.5. Research Assumption
 - 1.5.1. Inclusion & Exclusion
 - 1.5.2. Limitations
 - 1.5.3. Years Considered for the Study

CHAPTER 2. EXECUTIVE SUMMARY

- 2.1. CEO/CXO Standpoint
- 2.2. Strategic Insights
- 2.3. ESG Analysis
- 2.4. Key Findings

CHAPTER 3. GLOBAL ASSURED PNT MARKET FORCES ANALYSIS

- 3.1. Market Forces Shaping the Global Assured PNT Market (2024–2035)
- 3.2. Drivers
 - 3.2.1. Escalating Electronic Warfare Threats and Signal Jamming
 - 3.2.2. Rising Demand for Resilient, Anti-Jam PNT Capabilities
- 3.3. Restraints
 - 3.3.1. High Cost of Advanced Inertial Navigation Systems
 - 3.3.2. Complexity of Multi-Layered PNT Integration
- 3.4. Opportunities
 - 3.4.1. Shift toward Network-Centric and Precision-Guided Warfare
 - 3.4.2. Expanding Homeland Security and Disaster Response Initiatives

CHAPTER 4. GLOBAL ASSURED PNT INDUSTRY ANALYSIS

- 4.1. Porter's Five Forces Model
 - 4.1.1. Bargaining Power of Buyer
 - 4.1.2. Bargaining Power of Supplier
 - 4.1.3. Threat of New Entrants
 - 4.1.4. Threat of Substitutes
 - 4.1.5. Competitive Rivalry
- 4.2. Porter's Five Forces Forecast Model (2024–2035)
- 4.3. PESTEL Analysis
 - 4.3.1. Political
 - 4.3.2. Economical
 - 4.3.3. Social
 - 4.3.4. Technological
 - 4.3.5. Environmental
 - 4.3.6. Legal
- 4.4. Top Investment Opportunities
- 4.5. Top Winning Strategies (2025)
- 4.6. Market Share Analysis (2024–2025)
- 4.7. Global Pricing Analysis and Trends 2025
- 4.8. Analyst Recommendation & Conclusion

CHAPTER 5. GLOBAL ASSURED PNT MARKET SIZE & FORECASTS BY PLATFORM (2025–2035)

- 5.1. Market Overview
- 5.2. Fighter Aircraft
 - 5.2.1. Top Countries Breakdown Estimates & Forecasts, 2024–2035
 - 5.2.2. Market Size Analysis, by Region, 2025–2035
- 5.3. Military Helicopters
 - 5.3.1. Top Countries Breakdown Estimates & Forecasts, 2024–2035
 - 5.3.2. Market Size Analysis, by Region, 2025–2035
- 5.4. Unmanned Vehicles
 - 5.4.1. Top Countries Breakdown Estimates & Forecasts, 2024–2035
 - 5.4.2. Market Size Analysis, by Region, 2025–2035
- 5.5. Combat Vehicles
- 5.6. Soldiers
- 5.7. Submarines
- 5.8. Corvettes

5.9. Destroyers

5.10. Frigates

CHAPTER 6. GLOBAL ASSURED PNT MARKET SIZE & FORECASTS BY END USER (2025–2035)

6.1. Market Overview

6.2. Defense

6.2.1. Top Countries Breakdown Estimates & Forecasts, 2024–2035

6.2.2. Market Size Analysis, by Region, 2025–2035

6.3. Homeland Security

6.3.1. Top Countries Breakdown Estimates & Forecasts, 2024–2035

6.3.2. Market Size Analysis, by Region, 2025–2035

CHAPTER 7. GLOBAL ASSURED PNT MARKET SIZE & FORECASTS BY COMPONENT (2025–2035)

7.1. Market Overview

7.2. Hardware

7.2.1. Top Countries Breakdown Estimates & Forecasts, 2024–2035

7.2.2. Market Size Analysis, by Region, 2025–2035

7.3. Software

7.3.1. Top Countries Breakdown Estimates & Forecasts, 2024–2035

7.3.2. Market Size Analysis, by Region, 2025–2035

7.4. Services

7.4.1. Top Countries Breakdown Estimates & Forecasts, 2024–2035

7.4.2. Market Size Analysis, by Region, 2025–2035

CHAPTER 8. GLOBAL ASSURED PNT MARKET SIZE & FORECASTS BY REGION (2025–2035)

8.1. Market Snapshot & Leading Countries

8.2. North America

8.2.1. U.S. Assured PNT Market

8.2.1.1. Platform Breakdown & Forecasts, 2025–2035

8.2.1.2. Component Breakdown & Forecasts, 2025–2035

8.2.2. Canada Assured PNT Market

8.2.2.1. Platform Breakdown & Forecasts, 2025–2035

8.2.2.2. Component Breakdown & Forecasts, 2025–2035

8.3. Europe

8.3.1. UK Assured PNT Market

8.3.1.1. Platform Breakdown & Forecasts, 2025–2035

8.3.1.2. Component Breakdown & Forecasts, 2025–2035

8.3.2. Germany Assured PNT Market

8.3.2.1. Platform Breakdown & Forecasts, 2025–2035

8.3.2.2. Component Breakdown & Forecasts, 2025–2035

8.3.3. France Assured PNT Market

8.3.3.1. Platform Breakdown & Forecasts, 2025–2035

8.3.3.2. Component Breakdown & Forecasts, 2025–2035

8.3.4. Spain Assured PNT Market

8.3.4.1. Platform Breakdown & Forecasts, 2025–2035

8.3.4.2. Component Breakdown & Forecasts, 2025–2035

8.3.5. Italy Assured PNT Market

8.3.5.1. Platform Breakdown & Forecasts, 2025–2035

8.3.5.2. Component Breakdown & Forecasts, 2025–2035

8.3.6. Rest of Europe

8.4. Asia Pacific

8.4.1. China Assured PNT Market

8.4.1.1. Platform Breakdown & Forecasts, 2025–2035

8.4.1.2. Component Breakdown & Forecasts, 2025–2035

8.4.2. India Assured PNT Market

8.4.2.1. Platform Breakdown & Forecasts, 2025–2035

8.4.2.2. Component Breakdown & Forecasts, 2025–2035

8.4.3. Japan Assured PNT Market

8.4.3.1. Platform Breakdown & Forecasts, 2025–2035

8.4.3.2. Component Breakdown & Forecasts, 2025–2035

8.4.4. Australia Assured PNT Market

8.4.4.1. Platform Breakdown & Forecasts, 2025–2035

8.4.4.2. Component Breakdown & Forecasts, 2025–2035

8.4.5. South Korea Assured PNT Market

8.4.5.1. Platform Breakdown & Forecasts, 2025–2035

8.4.5.2. Component Breakdown & Forecasts, 2025–2035

8.4.6. Rest of Asia Pacific

8.5. Latin America

8.5.1. Brazil Assured PNT Market

8.5.1.1. Platform Breakdown & Forecasts, 2025–2035

8.5.1.2. Component Breakdown & Forecasts, 2025–2035

8.5.2. Mexico Assured PNT Market

- 8.5.2.1. Platform Breakdown & Forecasts, 2025–2035
- 8.5.2.2. Component Breakdown & Forecasts, 2025–2035
- 8.6. Middle East & Africa
 - 8.6.1. UAE Assured PNT Market
 - 8.6.1.1. Platform Breakdown & Forecasts, 2025–2035
 - 8.6.1.2. Component Breakdown & Forecasts, 2025–2035
 - 8.6.2. Saudi Arabia Assured PNT Market
 - 8.6.2.1. Platform Breakdown & Forecasts, 2025–2035
 - 8.6.2.2. Component Breakdown & Forecasts, 2025–2035
 - 8.6.3. South Africa Assured PNT Market
 - 8.6.3.1. Platform Breakdown & Forecasts, 2025–2035
 - 8.6.3.2. Component Breakdown & Forecasts, 2025–2035
 - 8.6.4. Rest of Middle East & Africa

CHAPTER 9. COMPETITIVE INTELLIGENCE

- 9.1. Top Market Strategies
- 9.2. BAE Systems
 - 9.2.1. Company Overview
 - 9.2.2. Key Executives
 - 9.2.3. Company Snapshot
 - 9.2.4. Financial Performance (Subject to Data Availability)
 - 9.2.5. Product/Services Portfolio
 - 9.2.6. Recent Developments
 - 9.2.7. Market Strategies
 - 9.2.8. SWOT Analysis
- 9.3. Northrop Grumman Corporation
- 9.4. Collins Aerospace
- 9.5. Raytheon Technologies Corporation
- 9.6. Safran Group
- 9.7. L3Harris Technologies
- 9.8. Honeywell International Inc.
- 9.9. Thales Group
- 9.10. Lockheed Martin Corporation
- 9.11. Curtiss-Wright Corporation
- 9.12. General Dynamics Corporation
- 9.13. Elbit Systems Ltd.
- 9.14. Leonardo S.p.A.
- 9.15. KVH Industries, Inc.

List Of Tables

LIST OF TABLES

- Table 1. Global Assured PNT Market, Report Scope
- Table 2. Global Assured PNT Market Estimates & Forecasts by Region 2024–2035
- Table 3. Global Assured PNT Market Estimates & Forecasts by Platform 2024–2035
- Table 4. Global Assured PNT Market Estimates & Forecasts by End User 2024–2035
- Table 5. Global Assured PNT Market Estimates & Forecasts by Component 2024–2035
- Table 6. U.S. Assured PNT Market Estimates & Forecasts, 2024–2035
- Table 7. Canada Assured PNT Market Estimates & Forecasts, 2024–2035
- Table 8. UK Assured PNT Market Estimates & Forecasts, 2024–2035
- Table 9. Germany Assured PNT Market Estimates & Forecasts, 2024–2035
- Table 10. France Assured PNT Market Estimates & Forecasts, 2024–2035
- Table 11. Spain Assured PNT Market Estimates & Forecasts, 2024–2035
- Table 12. Italy Assured PNT Market Estimates & Forecasts, 2024–2035
- Table 13. Rest of Europe Assured PNT Market Estimates & Forecasts, 2024–2035
- Table 14. China Assured PNT Market Estimates & Forecasts, 2024–2035
- Table 15. India Assured PNT Market Estimates & Forecasts, 2024–2035
- Table 16. Japan Assured PNT Market Estimates & Forecasts, 2024–2035
- Table 17. Australia Assured PNT Market Estimates & Forecasts, 2024–2035
- Table 18. South Korea Assured PNT Market Estimates & Forecasts, 2024–2035
- Table 19. Brazil Assured PNT Market Estimates & Forecasts, 2024–2035
- Table 20. Mexico Assured PNT Market Estimates & Forecasts, 2024–2035

List Of Figures

LIST OF FIGURES

- Fig 1. Global Assured PNT Market, Research Methodology
- Fig 2. Global Assured PNT Market, Market Estimation Techniques
- Fig 3. Global Assured PNT Market Size Estimates & Forecast Methods
- Fig 4. Global Assured PNT Market, Key Trends 2025
- Fig 5. Global Assured PNT Market, Growth Prospects 2024–2035
- Fig 6. Global Assured PNT Market, Porter’s Five Forces Model
- Fig 7. Global Assured PNT Market, PESTEL Analysis
- Fig 8. Global Assured PNT Market, Value Chain Analysis
- Fig 9. Assured PNT Market by Platform, 2025 & 2035
- Fig 10. Assured PNT Market by End User, 2025 & 2035
- Fig 11. Assured PNT Market by Component, 2025 & 2035
- Fig 12. North America Assured PNT Market, 2025 & 2035
- Fig 13. Europe Assured PNT Market, 2025 & 2035
- Fig 14. Asia Pacific Assured PNT Market, 2025 & 2035
- Fig 15. Latin America Assured PNT Market, 2025 & 2035
- Fig 16. Middle East & Africa Assured PNT Market, 2025 & 2035
- Fig 17. Global Assured PNT Market, Company Market Share Analysis (2025)

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