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# Global Agricultural Drone RTK GNSS Positioning Module Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Agricultural Drone RTK GNSS Positioning Module market size is expected to reach $ 111 million by 2032, rising at a market growth of 11.9% CAGR during the forecast period (2026-2032).

The Agricultural Drone RTK GNSS Positioning Module market covers embedded high-precision positioning modules, OEM boards, integrated GNSS/inertial modules, and enclosed receiver units installed in agricultural unmanned aerial vehicles. These products receive multi-constellation satellite signals and real-time correction data to provide centimeter-level positioning for autonomous flight, route repetition, boundary control, precision spraying, granular spreading, seeding, agricultural mapping, and crop scouting. Key product parameters include supported frequency bands, satellite constellations, RTK convergence time, positioning accuracy, correction-data compatibility, update rate, antenna configuration, power consumption, form factor, interface compatibility, resistance to vibration and environmental exposure, and integration with flight-control and inertial systems. This study focuses on the hardware value of RTK GNSS modules and inseparable positioning components supplied for agricultural drone installation, including factory-installed, customized OEM, replacement, and upgrade products.

## Key Findings

The global average ex-factory price of Agricultural Drone RTK GNSS Positioning Modules was approximately US$100–180 per unit in 2025, with a weighted average of about US$135 per unit.

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Surface-mount RTK modules remained the largest product form by shipment volume, while OEM RTK boards and integrated GNSS/inertial modules occupied higher-value segments.

Dual-band RTK remained the mainstream frequency configuration, while triple-band and above products continued to gain penetration in premium agricultural drone platforms.

Crop spraying remained the largest downstream application, while granular spreading and seeding represented faster-growing demand segments.

China remained the largest demand market and the principal manufacturing base for Agricultural Drone RTK GNSS Positioning Modules.

Latin America and Southeast Asia were among the faster-expanding regional markets for agricultural drones and supporting high-precision positioning modules.

## Market Trends

The product roadmap is moving from dual-band positioning toward broader multi-band and multi-constellation reception, faster RTK fixing, improved interference resistance, and tighter GNSS/inertial integration. Current high-precision modules increasingly combine centimeter-level RTK, compact form factors, low power consumption, correction-service compatibility, and anti-jamming or anti-spoofing functions. Dual-antenna heading is also gaining relevance in applications requiring reliable orientation during hovering or low-speed operation, while GNSS/IMU fusion improves positioning continuity during rapid attitude changes or short periods of signal degradation.

The supply model is also evolving from standalone hardware sales toward deeper cooperation with drone manufacturers. Module suppliers are increasingly required to provide customized firmware, flight-controller interfaces, antenna-matching support, production calibration, diagnostic tools, and long-term product availability. As core RTK hardware becomes more standardized, product differentiation is shifting toward reliability, integration efficiency, correction-data ecosystems, cybersecurity, and technical support.

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# Market Dynamics

Market development reflects a balance between rapid agricultural drone adoption and continued price pressure on GNSS electronics. Higher agricultural drone shipments and rising RTK configuration rates expand unit demand, but semiconductor integration, localization of core components, and large-volume OEM procurement constrain average selling prices. Revenue growth therefore depends not only on module volume but also on the adoption of integrated inertial navigation, dual-antenna heading, resilient positioning, and other higher-value configurations.

## Drivers

The principal growth driver is the increasing use of agricultural drones as routine production equipment rather than occasional crop-protection tools. By 2025, the global agricultural drone fleet had exceeded 500,000 units, supporting a growing installed base for original equipment installation, maintenance, and replacement demand. RTK positioning improves route repeatability, spraying boundary control, overlap management, operation traceability, and autonomous return accuracy, making it increasingly important for high-capacity spraying and spreading platforms.

Labor shortages, rising agricultural service costs, larger operational areas, and the need to reduce chemical, fertilizer, seed, and water consumption further support adoption. Government support for smart agriculture, agricultural mechanization, digital farming, and low-altitude applications also accelerates equipment deployment, particularly in markets where agricultural service organizations operate fleets across multiple farms.

## Restraints

The major restraint is continued price compression in mainstream RTK modules. Increasing availability of domestically developed GNSS chips, reference designs, correction services, and standardized modules lowers entry barriers in mid-range products and weakens hardware-only differentiation. Large agricultural drone manufacturers also possess strong procurement leverage and may adopt customized modules, internally developed positioning components, or multi-source procurement strategies.

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Demand remains dependent on agricultural drone replacement cycles and regional operating economics. Small farms, fragmented land ownership, limited correction-network coverage, uncertain local regulations, and weak after-sales infrastructure may slow adoption. In some basic applications, standard GNSS combined with visual, radar, or inertial assistance may provide sufficient performance, reducing the need for premium RTK configurations.

## Opportunities

The strongest opportunities are concentrated in higher-value positioning configurations rather than basic RTK hardware. Triple-band and above receivers, dual-antenna heading modules, integrated GNSS/inertial products, interference-resistant receivers, and modules supporting network RTK, satellite-delivered corrections, or PPP-RTK can achieve stronger product differentiation. Suppliers capable of providing compact size, low weight, low power consumption, rapid fixed solutions, and seamless flight-controller integration are better positioned for premium agricultural drone platforms.

Emerging agricultural drone markets also provide expansion opportunities. Large-scale farming in Latin America, plantation agriculture in Southeast Asia, rice cultivation in parts of Asia, orchard operations in mountainous areas, and agricultural service fleets in the Middle East and Africa require reliable positioning under different terrain, connectivity, climate, and crop conditions. Localization of firmware, correction services, regulatory compliance, and after-sales support will be important for converting these opportunities into recurring revenue.

## Challenges

The principal technical challenges include maintaining centimeter-level accuracy under multipath interference, electromagnetic noise, vibration, high humidity, dust, temperature fluctuations, partial sky visibility, and unstable correction-data links. Agricultural drones must operate near motors, power electronics, pumps, radar, communication systems, and metallic structures, making antenna layout and electromagnetic compatibility critical to field reliability.

Suppliers must also manage long OEM qualification cycles, customized interfaces, strict weight and power limits, rapid drone-model updates, and downward price negotiations. GNSS spoofing, jamming, correction-service interruptions, export controls, regional frequency requirements, and intellectual-property risks introduce additional uncertainty.

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A product that performs well in laboratory tests may still require extensive field calibration and flight validation before achieving stable mass production.

## Industry Chain Analysis

The upstream industry includes GNSS baseband and radio-frequency chips, processors, RF front-end components, oscillators, antennas, inertial sensors, printed circuit boards, connectors, power-management devices, and correction-data infrastructure. Midstream participants design and manufacture surface-mount modules, OEM boards, GNSS/inertial modules, and enclosed receiver units, while also providing firmware development, calibration, testing, and flight-controller integration. Downstream customers include agricultural drone manufacturers, agricultural automation suppliers, repair and upgrade channels, agricultural service organizations, large farms, cooperatives, and specialized drone operators.

The supply chain is geographically concentrated. China has a complete ecosystem covering chips, modules, boards, drone manufacturing, and agricultural applications. Europe and North America have stronger positions in high-precision receiver architecture, resilient GNSS, inertial integration, and professional OEM products. Taiwan and Japan maintain capabilities in GNSS electronics, module manufacturing, navigation hardware, and selected precision-agriculture solutions.

### Value Chain Analysis

Basic component procurement and printed circuit board assembly account for a relatively limited portion of final product differentiation. Higher value is created through receiver algorithms, carrier-phase processing, rapid ambiguity resolution, interference mitigation, inertial fusion, firmware customization, antenna design, correction-data compatibility, environmental testing, production calibration, and OEM qualification. Suppliers with established hardware platforms and reusable software stacks can spread development costs across drones, robotics, surveying, and agricultural machinery.

Value capture differs by product form. Surface-mount modules generally generate the largest unit volumes but face stronger price competition. OEM boards earn additional value through interfaces, power management, shielding, connectors, and customer-specific design. Integrated GNSS/inertial and dual-antenna products command higher prices because they provide position, velocity, heading, and attitude outputs while

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reducing the integration burden for drone manufacturers.

## Segment Insights

By product form, surface-mount RTK modules remain the largest segment by volume because they offer compact dimensions, scalable assembly, and lower unit costs for high-volume drone production. OEM RTK boards serve manufacturers seeking faster integration and reduced internal hardware development, while integrated GNSS/inertial modules and enclosed receiver units address higher-value platforms requiring additional navigation outputs, environmental protection, or easier replacement.

By frequency capability, dual-band RTK is the mainstream category, balancing cost, convergence speed, and positioning reliability. Triple-band and above products are expanding in premium platforms requiring improved satellite availability and more stable operation in difficult environments. By antenna configuration, single-antenna products dominate volume, while dual-antenna modules address applications requiring heading at standstill or low speed. Sensor integration constitutes a separate dimension, with standalone GNSS RTK and GNSS/inertial integrated RTK serving different performance and pricing requirements.

## Downstream Market Opportunities

Crop spraying remains the largest application because accurate flight paths, boundary management, and repeatable operation directly affect chemical coverage, overlap, and operating efficiency. Granular spreading and seeding provide strong incremental demand as agricultural drones develop from single-purpose spraying equipment into multifunctional aerial work platforms. These operations place greater emphasis on route repeatability, flow-control coordination, and accurate return to previously defined field paths.

Agricultural mapping and scouting create opportunities for high-accuracy geotagging and direct georeferencing, while orchard and plantation operations require improved positioning stability under complex terrain and partial canopy interference. Pasture management, feed spreading, agricultural transport, and other specialized operations remain smaller segments but may support higher-value modules where autonomous routing and operational safety are critical.

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## Regional Insights

China remains the largest regional demand market and the principal manufacturing hub. By November 2025, the country had more than 300,000 agricultural drones in operation and annual agricultural drone operations exceeded 3 billion mu, covering crop protection, fertilization, transportation, and other tasks. This large installed base supports both factory-installed module demand and an expanding maintenance and replacement market.

North America and Europe emphasize professional agricultural services, large farms, mapping accuracy, regulatory compliance, and resilient positioning, supporting demand for higher-value modules and OEM boards. Asia-Pacific excluding China benefits from rice, plantation, orchard, and smallholder service applications. Latin America offers substantial growth potential because of large commercial farms and long operating distances, while the Middle East and Africa represent developing markets where labor efficiency, water management, and agricultural modernization can support selective adoption.

## Competitive Landscape Analysis

The competitive landscape is regionally differentiated. Chinese suppliers benefit from proximity to the world’s largest agricultural drone manufacturing base, complete GNSS and electronics supply chains, rapid customization, and cost-efficient mass production. European and North American suppliers generally compete through high-precision algorithms, multi-band reception, resilient positioning, inertial integration, reliability, and long-term OEM support. Taiwan and Japan maintain selected strengths in GNSS module manufacturing, navigation electronics, component quality, and specialized positioning products.

Competition is based on more than nominal positioning accuracy. Important purchasing criteria include fixed-solution acquisition time, signal availability, interference resistance, update rate, power consumption, size, weight, interface compatibility, correction-protocol support, firmware stability, environmental reliability, supply continuity, and technical support. The market is moderately concentrated among established high-precision positioning suppliers and large Asian module manufacturers, but regional board manufacturers and specialized OEM suppliers continue to serve customized and price-sensitive applications.

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## Report Scope

This report studies the global Agricultural Drone RTK GNSS Positioning Module production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Agricultural Drone RTK GNSS Positioning Module and provides market size (US$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Agricultural Drone RTK GNSS Positioning Module that contribute to its increasing demand across many markets.

## Highlights and key features of the study

Global Agricultural Drone RTK GNSS Positioning Module total production and demand, 2021-2032, (K Units)

Global Agricultural Drone RTK GNSS Positioning Module total production value, 2021-2032, (USD Million)

Global Agricultural Drone RTK GNSS Positioning Module production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Agricultural Drone RTK GNSS Positioning Module consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Agricultural Drone RTK GNSS Positioning Module domestic production, consumption, key domestic manufacturers and share

Global Agricultural Drone RTK GNSS Positioning Module production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Agricultural Drone RTK GNSS Positioning Module production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

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Global Agricultural Drone RTK GNSS Positioning Module production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Agricultural Drone RTK GNSS Positioning Module market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include u-blox AG, LOCOSYS Technology Inc., Beijing BDStar Navigation Co., Ltd., ComNav Technology Ltd., Quectel Wireless Solutions Co., Ltd., SIMCom Wireless Solutions Limited, SKYLAB M&C Technology Co., Ltd., SkyTraq Technology, Inc., Fibocom Wireless Inc., Trimble Inc., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Agricultural Drone RTK GNSS Positioning Module market

## Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (K Units) and average price (US$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

### Global Agricultural Drone RTK GNSS Positioning Module Market, By Region:

United States

China

Europe

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Japan

South Korea

ASEAN

India

Rest of World

## Market Segmentation

### Global Agricultural Drone RTK GNSS Positioning Module Market, Segmentation by Type:

Surface-mount RTK Module

OEM RTK Board

Integrated GNSS/INS Module

Enclosed RTK Receiver Unit

Others

### Global Agricultural Drone RTK GNSS Positioning Module Market, Segmentation by Frequency Capability:

Single-band RTK

Dual-band RTK

Triple-band and Above RTK

Others

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## Global Agricultural Drone RTK GNSS Positioning Module Market, Segmentation by Positioning Architecture:

Single-antenna GNSS RTK

Dual-antenna GNSS RTK

Others

## Global Agricultural Drone RTK GNSS Positioning Module Market, Segmentation by Application:

Crop Protection / Spraying

Seeding

Precision Fertilization

Agricultural Surveying & Mapping

Others

## Companies Profiled:

u-blox AG

LOCOSYS Technology Inc.

Beijing BDStar Navigation Co., Ltd.

ComNav Technology Ltd.

Quectel Wireless Solutions Co., Ltd.

SIMCom Wireless Solutions Limited

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SKYLAB M&C Technology Co., Ltd.

SkyTraq Technology, Inc.

Fibocom Wireless Inc.

Trimble Inc.

Septentrio NV

Hexagon AB

Emlid Tech Kft.

Tersus GNSS Inc.

EPS Works SL

Topcon Corporation

## Key Questions Answered

1. How big is the global Agricultural Drone RTK GNSS Positioning Module market?
2. What is the demand of the global Agricultural Drone RTK GNSS Positioning Module market?
3. What is the year over year growth of the global Agricultural Drone RTK GNSS Positioning Module market?
4. What is the total value of the global Agricultural Drone RTK GNSS Positioning Module market?
5. Who are the Major Players in the global Agricultural Drone RTK GNSS Positioning Module market?
6. What are the growth factors driving the market demand?

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