

Global Civilian Drone Anti-Jamming Navigation Module Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Civilian Drone Anti-Jamming Navigation Module market size is expected to reach \$ 1256 million by 2032, rising at a market growth of 67.1% CAGR during the forecast period (2026-2032).

Civilian Drone Anti-Jamming Navigation Module refers to a specialized component integrated into the navigation system of civilian drones (including industrial, consumer, logistics, eVTOL, etc.). Its core function is to maintain reliable position, velocity, and timing information under unintentional interference sources (high-voltage power lines, communication base stations, multipath reflections) and low-level intentional jamming (drone jamming guns, portable interferers). Unlike military modules, civilian modules focus on cost control, miniaturization, low power consumption, and deep integration with flight control systems. Technology pathways include low-cost signal-level anti-jamming (e.g., limited-channel adaptive nulling, notch filtering) and information-level anti-spoofing (civilian encryption authentication, signal quality monitoring), with gradual adoption of system-level alternative navigation (vision/INS/LiDAR fusion) as a backup under GNSS denial. Typical applications include urban low-altitude logistics, power/pipeline inspection, agricultural spraying, security surveillance, and crewed eVTOL redundant navigation.

Civilian drone anti-jamming navigation modules are the 'invisible safety backbone' for scaling low-altitude economy and industrial drones. Unlike military anti-jamming that prioritizes extreme survivability, civilian modules focus on cost-effective, low-power solutions to ensure positioning reliability under unintentional interference (urban canyons, high-voltage lines, telecom base stations), while meeting regulatory requirements such as Remote ID and geofencing. Pricing: chip-level or software-only

anti-jamming adds only USD 1?5, becoming standard on consumer drones; mid-range OEM modules (e.g., Sinan K801, Septentrio mosaic?G5) cost USD 50?150, targeting industrial drones; high-end vision/INS fusion modules (e.g., Evolution Dynamics N200) run USD 200?500, typically for eVTOL and large industrial platforms. Margins differ significantly from military: civilian margins are generally 15?25% due to intense competition and cost sensitivity, while high-precision RTK modules (u-blox, Septentrio) achieve 35?45% due to technical barriers. Downstream primary applications: power/pipeline inspection and agriculture account for ~40% of module consumption, urban logistics ~20%, public safety ~15%, eVTOL and drone light shows ~10% each, others including surveying and search & rescue. Incremental demand comes from: (1) proposed regulations in China and Europe mandating redundant navigation for drones (e.g., CAAC's ?triple redundancy? for eVTOL), which could drive penetration from 10?15% to 40?50%; (2) US BVLOS rule expansion, boosting demand for high-integrity RTK+anti-jamming modules for logistics; (3) falling cost of vision navigation (e.g., Evolution Dynamics N200 at USD 399), making system-level alternative navigation more accessible. Upstream-downstream structure: upstream ? GNSS chip/module designers (u-blox, Septentrio, Sinan, Huace, Hexin), augmentation service providers (Qianxun, DJI D-RTK), vision/IMU sensor suppliers; midstream ? module integrators and flight controller makers; downstream ? drone OEMs (DJI, Zongheng, Puzhou) and end users. Landscape: international brands still lead in high-precision baseband and anti-jamming algorithms, but Chinese players are catching up rapidly. u-blox and Septentrio dominate high-end industrial segments; Sinan Navigation (K601 with 40mW power) and Huace Navigation (self-developed Xuanji chip) have achieved scale in mid-range markets; Qianxun and DJI D-RTK reduce per-drone anti-jamming cost through augmentation services; startups like Evolution Dynamics and UNIBIRD are popularizing vision navigation. Uncertainties include: (1) whether anti-jamming modules could be partially replaced by GNSS augmentation services (e.g., PPP-RTK) that also provide integrity monitoring; (2) performance limitations of vision navigation in rain, fog, night, or low-texture environments (water, snow); (3) inconsistent regulatory enforcement ? delayed mandates would slow penetration; (4) cost pressure leading some OEMs to choose software-only solutions over hardware modules, compressing module suppliers' space. Conclusion: Civilian drone anti-jamming navigation modules are the essential pathway from ?consumer-grade entertainment? to ?mission-critical industrial and passenger-carrying applications?. Core drivers are the rigid demand for positioning reliability in scaling low-altitude economy, and regulatory mandates for position integrity. Structural features are high cost-performance sensitivity, diverse technology routes (chip/software/fusion), and regulation being a stronger driver than technology. Over the next three years, module suppliers with low power, small size, and deep flight

controller integration (Sinan, Huace, Septentrio) will continue to expand share in industrial drone markets, while vision/INS fusion solutions will gradually become standard redundancy for eVTOL and BVLOS logistics.

This report studies the global Civilian Drone Anti-Jamming Navigation Module production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Civilian Drone Anti-Jamming Navigation 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 Civilian Drone Anti-Jamming Navigation Module that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Civilian Drone Anti-Jamming Navigation Module total production and demand, 2021-2032, (Units)

Global Civilian Drone Anti-Jamming Navigation Module total production value, 2021-2032, (USD Million)

Global Civilian Drone Anti-Jamming Navigation Module production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Civilian Drone Anti-Jamming Navigation Module consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Civilian Drone Anti-Jamming Navigation Module domestic production, consumption, key domestic manufacturers and share

Global Civilian Drone Anti-Jamming Navigation Module production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Civilian Drone Anti-Jamming Navigation Module production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Civilian Drone Anti-Jamming Navigation Module production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Civilian Drone Anti-Jamming Navigation 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, Septentrio (Hexagon), Sinan Navigation, Huace Navigation, Hexin Xingtong, BeiDou Xingtong, Mengsheng Electronics, Chenyun Satellite Navigation, Qianxun Position, DJI (D-RTK),

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 Civilian Drone Anti-Jamming Navigation Module market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (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 Civilian Drone Anti-Jamming Navigation Module Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Civilian Drone Anti-Jamming Navigation Module Market, Segmentation by Type:

Signal?Level Anti?Jamming (Civilian Grade)

Information?Level Anti?Spoofing (Civilian Grade)

System?Level Alternative Navigation (GNSS?Denied Backup)

Global Civilian Drone Anti-Jamming Navigation Module Market, Segmentation by Integration:

Chip / SoC (Ultra?low power, 1W)

Global Civilian Drone Anti-Jamming Navigation Module Market, Segmentation by Application:

Urban Low?Altitude Logistics

Power Line & Pipeline Inspection

Agricultural Spraying (UAV)

Public Safety & Surveillance

eVTOL / Air Taxi (Urban Air Mobility)

Drone Light Shows (Entertainment)

Others

Companies Profiled:

u-blox

Septentrio (Hexagon)

Sinan Navigation

Huace Navigation

Hexin Xingtong

BeiDou Xingtong

Mengsheng Electronics

Chenyun Satellite Navigation

Qianxun Position

DJI (D-RTK)

Huada BeiDou

Evolution Dynamics

UNIBIRD

Honeywell (HANA)

ANELLO Photonics

Qianxing Technology

Ligong Navigation

HYFIX Spatial Intelligence

DJI Innovation

Puzhou Technology

Zongheng Shares

Aerospace Rainbow

Key Questions Answered:

1. How big is the global Civilian Drone Anti-Jamming Navigation Module market?

2. What is the demand of the global Civilian Drone Anti-Jamming Navigation Module market?
3. What is the year over year growth of the global Civilian Drone Anti-Jamming Navigation Module market?
4. What is the production and production value of the global Civilian Drone Anti-Jamming Navigation Module market?
5. Who are the key producers in the global Civilian Drone Anti-Jamming Navigation Module market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 Civilian Drone Anti-Jamming Navigation Module Introduction
- 1.2 World Civilian Drone Anti-Jamming Navigation Module Supply & Forecast
 - 1.2.1 World Civilian Drone Anti-Jamming Navigation Module Production Value (2021 & 2025 & 2032)
 - 1.2.2 World Civilian Drone Anti-Jamming Navigation Module Production (2021-2032)
 - 1.2.3 World Civilian Drone Anti-Jamming Navigation Module Pricing Trends (2021-2032)
- 1.3 World Civilian Drone Anti-Jamming Navigation Module Production by Region (Based on Production Site)
 - 1.3.1 World Civilian Drone Anti-Jamming Navigation Module Production Value by Region (2021-2032)
 - 1.3.2 World Civilian Drone Anti-Jamming Navigation Module Production by Region (2021-2032)
 - 1.3.3 World Civilian Drone Anti-Jamming Navigation Module Average Price by Region (2021-2032)
 - 1.3.4 North America Civilian Drone Anti-Jamming Navigation Module Production (2021-2032)
 - 1.3.5 Europe Civilian Drone Anti-Jamming Navigation Module Production (2021-2032)
 - 1.3.6 China Civilian Drone Anti-Jamming Navigation Module Production (2021-2032)
 - 1.3.7 Japan Civilian Drone Anti-Jamming Navigation Module Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Civilian Drone Anti-Jamming Navigation Module Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Civilian Drone Anti-Jamming Navigation Module Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Civilian Drone Anti-Jamming Navigation Module Demand (2021-2032)
- 2.2 World Civilian Drone Anti-Jamming Navigation Module Consumption by Region
 - 2.2.1 World Civilian Drone Anti-Jamming Navigation Module Consumption by Region (2021-2026)
 - 2.2.2 World Civilian Drone Anti-Jamming Navigation Module Consumption Forecast by Region (2027-2032)
- 2.3 United States Civilian Drone Anti-Jamming Navigation Module Consumption (2021-2032)

- 2.4 China Civilian Drone Anti-Jamming Navigation Module Consumption (2021-2032)
- 2.5 Europe Civilian Drone Anti-Jamming Navigation Module Consumption (2021-2032)
- 2.6 Japan Civilian Drone Anti-Jamming Navigation Module Consumption (2021-2032)
- 2.7 South Korea Civilian Drone Anti-Jamming Navigation Module Consumption (2021-2032)
- 2.8 ASEAN Civilian Drone Anti-Jamming Navigation Module Consumption (2021-2032)
- 2.9 India Civilian Drone Anti-Jamming Navigation Module Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Civilian Drone Anti-Jamming Navigation Module Production Value by Manufacturer (2021-2026)
- 3.2 World Civilian Drone Anti-Jamming Navigation Module Production by Manufacturer (2021-2026)
- 3.3 World Civilian Drone Anti-Jamming Navigation Module Average Price by Manufacturer (2021-2026)
- 3.4 Civilian Drone Anti-Jamming Navigation Module Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global Civilian Drone Anti-Jamming Navigation Module Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for Civilian Drone Anti-Jamming Navigation Module in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for Civilian Drone Anti-Jamming Navigation Module in 2025
- 3.6 Civilian Drone Anti-Jamming Navigation Module Market: Overall Company Footprint Analysis
 - 3.6.1 Civilian Drone Anti-Jamming Navigation Module Market: Region Footprint
 - 3.6.2 Civilian Drone Anti-Jamming Navigation Module Market: Company Product Type Footprint
 - 3.6.3 Civilian Drone Anti-Jamming Navigation Module Market: Company Product Application Footprint
- 3.7 Competitive Environment
 - 3.7.1 Historical Structure of the Industry
 - 3.7.2 Barriers of Market Entry
 - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

4.1 United States VS China: Civilian Drone Anti-Jamming Navigation Module Production Value Comparison

4.1.1 United States VS China: Civilian Drone Anti-Jamming Navigation Module Production Value Comparison (2021 & 2025 & 2032)

4.1.2 United States VS China: Civilian Drone Anti-Jamming Navigation Module Production Value Market Share Comparison (2021 & 2025 & 2032)

4.2 United States VS China: Civilian Drone Anti-Jamming Navigation Module Production Comparison

4.2.1 United States VS China: Civilian Drone Anti-Jamming Navigation Module Production Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: Civilian Drone Anti-Jamming Navigation Module Production Market Share Comparison (2021 & 2025 & 2032)

4.3 United States VS China: Civilian Drone Anti-Jamming Navigation Module Consumption Comparison

4.3.1 United States VS China: Civilian Drone Anti-Jamming Navigation Module Consumption Comparison (2021 & 2025 & 2032)

4.3.2 United States VS China: Civilian Drone Anti-Jamming Navigation Module Consumption Market Share Comparison (2021 & 2025 & 2032)

4.4 United States Based Civilian Drone Anti-Jamming Navigation Module Manufacturers and Market Share, 2021-2026

4.4.1 United States Based Civilian Drone Anti-Jamming Navigation Module Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Civilian Drone Anti-Jamming Navigation Module Production Value (2021-2026)

4.4.3 United States Based Manufacturers Civilian Drone Anti-Jamming Navigation Module Production (2021-2026)

4.5 China Based Civilian Drone Anti-Jamming Navigation Module Manufacturers and Market Share

4.5.1 China Based Civilian Drone Anti-Jamming Navigation Module Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Civilian Drone Anti-Jamming Navigation Module Production Value (2021-2026)

4.5.3 China Based Manufacturers Civilian Drone Anti-Jamming Navigation Module Production (2021-2026)

4.6 Rest of World Based Civilian Drone Anti-Jamming Navigation Module Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Civilian Drone Anti-Jamming Navigation Module Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Civilian Drone Anti-Jamming Navigation Module Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Civilian Drone Anti-Jamming Navigation Module Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Civilian Drone Anti-Jamming Navigation Module Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Signal?Level Anti?Jamming (Civilian Grade)

5.2.2 Information?Level Anti?Spoofing (Civilian Grade)

5.2.3 System?Level Alternative Navigation (GNSS?Denied Backup)

5.3 Market Segment by Type

5.3.1 World Civilian Drone Anti-Jamming Navigation Module Production by Type (2021-2032)

5.3.2 World Civilian Drone Anti-Jamming Navigation Module Production Value by Type (2021-2032)

5.3.3 World Civilian Drone Anti-Jamming Navigation Module Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY INTEGRATION

6.1 World Civilian Drone Anti-Jamming Navigation Module Market Size Overview by Integration: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Integration

6.2.1 Chip / SoC (Ultra?low power, 1W)

6.3 Market Segment by Integration

6.3.1 World Civilian Drone Anti-Jamming Navigation Module Production by Integration (2021-2032)

6.3.2 World Civilian Drone Anti-Jamming Navigation Module Production Value by Integration (2021-2032)

6.3.3 World Civilian Drone Anti-Jamming Navigation Module Average Price by Integration (2021-2032)

7 MARKET ANALYSIS BY APPLICATION

7.1 World Civilian Drone Anti-Jamming Navigation Module Market Size Overview by Application: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Application

7.2.1 Urban Low?Altitude Logistics

7.2.2 Power Line & Pipeline Inspection

7.2.3 Agricultural Spraying (UAV)

7.2.4 Public Safety & Surveillance

7.2.5 eVTOL / Air Taxi (Urban Air Mobility)

7.2.6 Drone Light Shows (Entertainment)

7.2.7 Others

7.3 Market Segment by Application

7.3.1 World Civilian Drone Anti-Jamming Navigation Module Production by Application (2021-2032)

7.3.2 World Civilian Drone Anti-Jamming Navigation Module Production Value by Application (2021-2032)

7.3.3 World Civilian Drone Anti-Jamming Navigation Module Average Price by Application (2021-2032)

8 COMPANY PROFILES

8.1 u-blox

8.1.1 u-blox Details

8.1.2 u-blox Major Business

8.1.3 u-blox Civilian Drone Anti-Jamming Navigation Module Product and Services

8.1.4 u-blox Civilian Drone Anti-Jamming Navigation Module Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.1.5 u-blox Recent Developments/Updates

8.1.6 u-blox Competitive Strengths & Weaknesses

8.2 Septentrio (Hexagon)

8.2.1 Septentrio (Hexagon) Details

8.2.2 Septentrio (Hexagon) Major Business

8.2.3 Septentrio (Hexagon) Civilian Drone Anti-Jamming Navigation Module Product and Services

8.2.4 Septentrio (Hexagon) Civilian Drone Anti-Jamming Navigation Module Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.2.5 Septentrio (Hexagon) Recent Developments/Updates

8.2.6 Septentrio (Hexagon) Competitive Strengths & Weaknesses

8.3 Sinan Navigation

8.3.1 Sinan Navigation Details

8.3.2 Sinan Navigation Major Business

8.3.3 Sinan Navigation Civilian Drone Anti-Jamming Navigation Module Product and

Services

8.3.4 Sinan Navigation Civilian Drone Anti-Jamming Navigation Module Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.3.5 Sinan Navigation Recent Developments/Updates

8.3.6 Sinan Navigation Competitive Strengths & Weaknesses

8.4 Huace Navigation

8.4.1 Huace Navigation Details

8.4.2 Huace Navigation Major Business

8.4.3 Huace Navigation Civilian Drone Anti-Jamming Navigation Module Product and Services

8.4.4 Huace Navigation Civilian Drone Anti-Jamming Navigation Module Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.4.5 Huace Navigation Recent Developments/Updates

8.4.6 Huace Navigation Competitive Strengths & Weaknesses

8.5 Hexin Xingtong

8.5.1 Hexin Xingtong Details

8.5.2 Hexin Xingtong Major Business

8.5.3 Hexin Xingtong Civilian Drone Anti-Jamming Navigation Module Product and Services

8.5.4 Hexin Xingtong Civilian Drone Anti-Jamming Navigation Module Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.5.5 Hexin Xingtong Recent Developments/Updates

8.5.6 Hexin Xingtong Competitive Strengths & Weaknesses

8.6 BeiDou Xingtong

8.6.1 BeiDou Xingtong Details

8.6.2 BeiDou Xingtong Major Business

8.6.3 BeiDou Xingtong Civilian Drone Anti-Jamming Navigation Module Product and Services

8.6.4 BeiDou Xingtong Civilian Drone Anti-Jamming Navigation Module Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.6.5 BeiDou Xingtong Recent Developments/Updates

8.6.6 BeiDou Xingtong Competitive Strengths & Weaknesses

8.7 Mengsheng Electronics

8.7.1 Mengsheng Electronics Details

8.7.2 Mengsheng Electronics Major Business

8.7.3 Mengsheng Electronics Civilian Drone Anti-Jamming Navigation Module Product and Services

8.7.4 Mengsheng Electronics Civilian Drone Anti-Jamming Navigation Module Production, Price, Value, Gross Margin and Market Share (2021-2026)

- 8.7.5 Mengsheng Electronics Recent Developments/Updates
- 8.7.6 Mengsheng Electronics Competitive Strengths & Weaknesses
- 8.8 Chenyun Satellite Navigation
 - 8.8.1 Chenyun Satellite Navigation Details
 - 8.8.2 Chenyun Satellite Navigation Major Business
 - 8.8.3 Chenyun Satellite Navigation Civilian Drone Anti-Jamming Navigation Module Product and Services
 - 8.8.4 Chenyun Satellite Navigation Civilian Drone Anti-Jamming Navigation Module Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 8.8.5 Chenyun Satellite Navigation Recent Developments/Updates
 - 8.8.6 Chenyun Satellite Navigation Competitive Strengths & Weaknesses
- 8.9 Qianxun Position
 - 8.9.1 Qianxun Position Details
 - 8.9.2 Qianxun Position Major Business
 - 8.9.3 Qianxun Position Civilian Drone Anti-Jamming Navigation Module Product and Services
 - 8.9.4 Qianxun Position Civilian Drone Anti-Jamming Navigation Module Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 8.9.5 Qianxun Position Recent Developments/Updates
 - 8.9.6 Qianxun Position Competitive Strengths & Weaknesses
- 8.10 DJI (D-RTK)
 - 8.10.1 DJI (D-RTK) Details
 - 8.10.2 DJI (D-RTK) Major Business
 - 8.10.3 DJI (D-RTK) Civilian Drone Anti-Jamming Navigation Module Product and Services
 - 8.10.4 DJI (D-RTK) Civilian Drone Anti-Jamming Navigation Module Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 8.10.5 DJI (D-RTK) Recent Developments/Updates
 - 8.10.6 DJI (D-RTK) Competitive Strengths & Weaknesses
- 8.11 Huada BeiDou
 - 8.11.1 Huada BeiDou Details
 - 8.11.2 Huada BeiDou Major Business
 - 8.11.3 Huada BeiDou Civilian Drone Anti-Jamming Navigation Module Product and Services
 - 8.11.4 Huada BeiDou Civilian Drone Anti-Jamming Navigation Module Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 8.11.5 Huada BeiDou Recent Developments/Updates
 - 8.11.6 Huada BeiDou Competitive Strengths & Weaknesses
- 8.12 Evolution Dynamics

- 8.12.1 Evolution Dynamics Details
- 8.12.2 Evolution Dynamics Major Business
- 8.12.3 Evolution Dynamics Civilian Drone Anti-Jamming Navigation Module Product and Services
- 8.12.4 Evolution Dynamics Civilian Drone Anti-Jamming Navigation Module Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 8.12.5 Evolution Dynamics Recent Developments/Updates
- 8.12.6 Evolution Dynamics Competitive Strengths & Weaknesses
- 8.13 UNIBIRD
 - 8.13.1 UNIBIRD Details
 - 8.13.2 UNIBIRD Major Business
 - 8.13.3 UNIBIRD Civilian Drone Anti-Jamming Navigation Module Product and Services
 - 8.13.4 UNIBIRD Civilian Drone Anti-Jamming Navigation Module Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 8.13.5 UNIBIRD Recent Developments/Updates
 - 8.13.6 UNIBIRD Competitive Strengths & Weaknesses
- 8.14 Honeywell (HANA)
 - 8.14.1 Honeywell (HANA) Details
 - 8.14.2 Honeywell (HANA) Major Business
 - 8.14.3 Honeywell (HANA) Civilian Drone Anti-Jamming Navigation Module Product and Services
 - 8.14.4 Honeywell (HANA) Civilian Drone Anti-Jamming Navigation Module Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 8.14.5 Honeywell (HANA) Recent Developments/Updates
 - 8.14.6 Honeywell (HANA) Competitive Strengths & Weaknesses
- 8.15 ANELLO Photonics
 - 8.15.1 ANELLO Photonics Details
 - 8.15.2 ANELLO Photonics Major Business
 - 8.15.3 ANELLO Photonics Civilian Drone Anti-Jamming Navigation Module Product and Services
 - 8.15.4 ANELLO Photonics Civilian Drone Anti-Jamming Navigation Module Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 8.15.5 ANELLO Photonics Recent Developments/Updates
 - 8.15.6 ANELLO Photonics Competitive Strengths & Weaknesses
- 8.16 Qianxing Technology
 - 8.16.1 Qianxing Technology Details
 - 8.16.2 Qianxing Technology Major Business
 - 8.16.3 Qianxing Technology Civilian Drone Anti-Jamming Navigation Module Product and Services

- 8.16.4 Qianxing Technology Civilian Drone Anti-Jamming Navigation Module Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 8.16.5 Qianxing Technology Recent Developments/Updates
- 8.16.6 Qianxing Technology Competitive Strengths & Weaknesses
- 8.17 Ligong Navigation
 - 8.17.1 Ligong Navigation Details
 - 8.17.2 Ligong Navigation Major Business
 - 8.17.3 Ligong Navigation Civilian Drone Anti-Jamming Navigation Module Product and Services
 - 8.17.4 Ligong Navigation Civilian Drone Anti-Jamming Navigation Module Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 8.17.5 Ligong Navigation Recent Developments/Updates
 - 8.17.6 Ligong Navigation Competitive Strengths & Weaknesses
- 8.18 HYFIX Spatial Intelligence
 - 8.18.1 HYFIX Spatial Intelligence Details
 - 8.18.2 HYFIX Spatial Intelligence Major Business
 - 8.18.3 HYFIX Spatial Intelligence Civilian Drone Anti-Jamming Navigation Module Product and Services
 - 8.18.4 HYFIX Spatial Intelligence Civilian Drone Anti-Jamming Navigation Module Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 8.18.5 HYFIX Spatial Intelligence Recent Developments/Updates
 - 8.18.6 HYFIX Spatial Intelligence Competitive Strengths & Weaknesses
- 8.19 DJI Innovation
 - 8.19.1 DJI Innovation Details
 - 8.19.2 DJI Innovation Major Business
 - 8.19.3 DJI Innovation Civilian Drone Anti-Jamming Navigation Module Product and Services
 - 8.19.4 DJI Innovation Civilian Drone Anti-Jamming Navigation Module Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 8.19.5 DJI Innovation Recent Developments/Updates
 - 8.19.6 DJI Innovation Competitive Strengths & Weaknesses
- 8.20 Puzhou Technology
 - 8.20.1 Puzhou Technology Details
 - 8.20.2 Puzhou Technology Major Business
 - 8.20.3 Puzhou Technology Civilian Drone Anti-Jamming Navigation Module Product and Services
 - 8.20.4 Puzhou Technology Civilian Drone Anti-Jamming Navigation Module Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 8.20.5 Puzhou Technology Recent Developments/Updates

- 8.20.6 Puzhou Technology Competitive Strengths & Weaknesses
- 8.21 Zongheng Shares
 - 8.21.1 Zongheng Shares Details
 - 8.21.2 Zongheng Shares Major Business
 - 8.21.3 Zongheng Shares Civilian Drone Anti-Jamming Navigation Module Product and Services
 - 8.21.4 Zongheng Shares Civilian Drone Anti-Jamming Navigation Module Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 8.21.5 Zongheng Shares Recent Developments/Updates
 - 8.21.6 Zongheng Shares Competitive Strengths & Weaknesses
- 8.22 Aerospace Rainbow
 - 8.22.1 Aerospace Rainbow Details
 - 8.22.2 Aerospace Rainbow Major Business
 - 8.22.3 Aerospace Rainbow Civilian Drone Anti-Jamming Navigation Module Product and Services
 - 8.22.4 Aerospace Rainbow Civilian Drone Anti-Jamming Navigation Module Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 8.22.5 Aerospace Rainbow Recent Developments/Updates
 - 8.22.6 Aerospace Rainbow Competitive Strengths & Weaknesses

9 INDUSTRY CHAIN ANALYSIS

- 9.1 Civilian Drone Anti-Jamming Navigation Module Industry Chain
- 9.2 Civilian Drone Anti-Jamming Navigation Module Upstream Analysis
 - 9.2.1 Civilian Drone Anti-Jamming Navigation Module Core Raw Materials
 - 9.2.2 Main Manufacturers of Civilian Drone Anti-Jamming Navigation Module Core Raw Materials
- 9.3 Midstream Analysis
- 9.4 Downstream Analysis
- 9.5 Civilian Drone Anti-Jamming Navigation Module Production Mode
- 9.6 Civilian Drone Anti-Jamming Navigation Module Procurement Model
- 9.7 Civilian Drone Anti-Jamming Navigation Module Industry Sales Model and Sales Channels
 - 9.7.1 Civilian Drone Anti-Jamming Navigation Module Sales Model
 - 9.7.2 Civilian Drone Anti-Jamming Navigation Module Typical Distributors

10 RESEARCH FINDINGS AND CONCLUSION

11 APPENDIX

11.1 Methodology

11.2 Research Process and Data Source

11.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Civilian Drone Anti-Jamming Navigation Module Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Civilian Drone Anti-Jamming Navigation Module Production Value by Region (2021-2026) & (USD Million)

Table 3. World Civilian Drone Anti-Jamming Navigation Module Production Value by Region (2027-2032) & (USD Million)

Table 4. World Civilian Drone Anti-Jamming Navigation Module Production Value Market Share by Region (2021-2026)

Table 5. World Civilian Drone Anti-Jamming Navigation Module Production Value Market Share by Region (2027-2032)

Table 6. World Civilian Drone Anti-Jamming Navigation Module Production by Region (2021-2026) & (Units)

Table 7. World Civilian Drone Anti-Jamming Navigation Module Production by Region (2027-2032) & (Units)

Table 8. World Civilian Drone Anti-Jamming Navigation Module Production Market Share by Region (2021-2026)

Table 9. World Civilian Drone Anti-Jamming Navigation Module Production Market Share by Region (2027-2032)

Table 10. World Civilian Drone Anti-Jamming Navigation Module Average Price by Region (2021-2026) & (US\$/Unit)

Table 11. World Civilian Drone Anti-Jamming Navigation Module Average Price by Region (2027-2032) & (US\$/Unit)

Table 12. Civilian Drone Anti-Jamming Navigation Module Major Market Trends

Table 13. World Civilian Drone Anti-Jamming Navigation Module Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Units)

Table 14. World Civilian Drone Anti-Jamming Navigation Module Consumption by Region (2021-2026) & (Units)

Table 15. World Civilian Drone Anti-Jamming Navigation Module Consumption Forecast by Region (2027-2032) & (Units)

Table 16. World Civilian Drone Anti-Jamming Navigation Module Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Civilian Drone Anti-Jamming Navigation Module Producers in 2025

Table 18. World Civilian Drone Anti-Jamming Navigation Module Production by Manufacturer (2021-2026) & (Units)

Table 19. Production Market Share of Key Civilian Drone Anti-Jamming Navigation Module Producers in 2025

Table 20. World Civilian Drone Anti-Jamming Navigation Module Average Price by Manufacturer (2021-2026) & (US\$/Unit)

Table 21. Global Civilian Drone Anti-Jamming Navigation Module Company Evaluation Quadrant

Table 22. World Civilian Drone Anti-Jamming Navigation Module Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Civilian Drone Anti-Jamming Navigation Module Production Site of Key Manufacturer

Table 24. Civilian Drone Anti-Jamming Navigation Module Market: Company Product Type Footprint

Table 25. Civilian Drone Anti-Jamming Navigation Module Market: Company Product Application Footprint

Table 26. Civilian Drone Anti-Jamming Navigation Module Competitive Factors

Table 27. Civilian Drone Anti-Jamming Navigation Module New Entrant and Capacity Expansion Plans

Table 28. Civilian Drone Anti-Jamming Navigation Module Mergers & Acquisitions Activity

Table 29. United States VS China Civilian Drone Anti-Jamming Navigation Module Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Civilian Drone Anti-Jamming Navigation Module Production Comparison, (2021 & 2025 & 2032) & (Units)

Table 31. United States VS China Civilian Drone Anti-Jamming Navigation Module Consumption Comparison, (2021 & 2025 & 2032) & (Units)

Table 32. United States Based Civilian Drone Anti-Jamming Navigation Module Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Civilian Drone Anti-Jamming Navigation Module Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Civilian Drone Anti-Jamming Navigation Module Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Civilian Drone Anti-Jamming Navigation Module Production (2021-2026) & (Units)

Table 36. United States Based Manufacturers Civilian Drone Anti-Jamming Navigation Module Production Market Share (2021-2026)

Table 37. China Based Civilian Drone Anti-Jamming Navigation Module Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Civilian Drone Anti-Jamming Navigation Module Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Civilian Drone Anti-Jamming Navigation Module Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Civilian Drone Anti-Jamming Navigation Module Production, (2021-2026) & (Units)

Table 41. China Based Manufacturers Civilian Drone Anti-Jamming Navigation Module Production Market Share (2021-2026)

Table 42. Rest of World Based Civilian Drone Anti-Jamming Navigation Module Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Civilian Drone Anti-Jamming Navigation Module Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Civilian Drone Anti-Jamming Navigation Module Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Civilian Drone Anti-Jamming Navigation Module Production, (2021-2026) & (Units)

Table 46. Rest of World Based Manufacturers Civilian Drone Anti-Jamming Navigation Module Production Market Share (2021-2026)

Table 47. World Civilian Drone Anti-Jamming Navigation Module Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Civilian Drone Anti-Jamming Navigation Module Production by Type (2021-2026) & (Units)

Table 49. World Civilian Drone Anti-Jamming Navigation Module Production by Type (2027-2032) & (Units)

Table 50. World Civilian Drone Anti-Jamming Navigation Module Production Value by Type (2021-2026) & (USD Million)

Table 51. World Civilian Drone Anti-Jamming Navigation Module Production Value by Type (2027-2032) & (USD Million)

Table 52. World Civilian Drone Anti-Jamming Navigation Module Average Price by Type (2021-2026) & (US\$/Unit)

Table 53. World Civilian Drone Anti-Jamming Navigation Module Average Price by Type (2027-2032) & (US\$/Unit)

Table 54. World Civilian Drone Anti-Jamming Navigation Module Production Value by Integration, (USD Million), 2021 & 2025 & 2032

Table 55. World Civilian Drone Anti-Jamming Navigation Module Production by Integration (2021-2026) & (Units)

Table 56. World Civilian Drone Anti-Jamming Navigation Module Production by Integration (2027-2032) & (Units)

Table 57. World Civilian Drone Anti-Jamming Navigation Module Production Value by Integration (2021-2026) & (USD Million)

Table 58. World Civilian Drone Anti-Jamming Navigation Module Production Value by

Integration (2027-2032) & (USD Million)

Table 59. World Civilian Drone Anti-Jamming Navigation Module Average Price by Integration (2021-2026) & (US\$/Unit)

Table 60. World Civilian Drone Anti-Jamming Navigation Module Average Price by Integration (2027-2032) & (US\$/Unit)

Table 61. World Civilian Drone Anti-Jamming Navigation Module Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 62. World Civilian Drone Anti-Jamming Navigation Module Production by Application (2021-2026) & (Units)

Table 63. World Civilian Drone Anti-Jamming Navigation Module Production by Application (2027-2032) & (Units)

Table 64. World Civilian Drone Anti-Jamming Navigation Module Production Value by Application (2021-2026) & (USD Million)

Table 65. World Civilian Drone Anti-Jamming Navigation Module Production Value by Application (2027-2032) & (USD Million)

Table 66. World Civilian Drone Anti-Jamming Navigation Module Average Price by Application (2021-2026) & (US\$/Unit)

Table 67. World Civilian Drone Anti-Jamming Navigation Module Average Price by Application (2027-2032) & (US\$/Unit)

Table 68. u-blox Basic Information, Manufacturing Base and Competitors

Table 69. u-blox Major Business

Table 70. u-blox Civilian Drone Anti-Jamming Navigation Module Product and Services

Table 71. u-blox Civilian Drone Anti-Jamming Navigation Module Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 72. u-blox Recent Developments/Updates

Table 73. u-blox Competitive Strengths & Weaknesses

Table 74. Septentrio (Hexagon) Basic Information, Manufacturing Base and Competitors

Table 75. Septentrio (Hexagon) Major Business

Table 76. Septentrio (Hexagon) Civilian Drone Anti-Jamming Navigation Module Product and Services

Table 77. Septentrio (Hexagon) Civilian Drone Anti-Jamming Navigation Module Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 78. Septentrio (Hexagon) Recent Developments/Updates

Table 79. Septentrio (Hexagon) Competitive Strengths & Weaknesses

Table 80. Sinan Navigation Basic Information, Manufacturing Base and Competitors

Table 81. Sinan Navigation Major Business

Table 82. Sinan Navigation Civilian Drone Anti-Jamming Navigation Module Product and Services

Table 83. Sinan Navigation Civilian Drone Anti-Jamming Navigation Module Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 84. Sinan Navigation Recent Developments/Updates

Table 85. Sinan Navigation Competitive Strengths & Weaknesses

Table 86. Huace Navigation Basic Information, Manufacturing Base and Competitors

Table 87. Huace Navigation Major Business

Table 88. Huace Navigation Civilian Drone Anti-Jamming Navigation Module Product and Services

Table 89. Huace Navigation Civilian Drone Anti-Jamming Navigation Module Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 90. Huace Navigation Recent Developments/Updates

Table 91. Huace Navigation Competitive Strengths & Weaknesses

Table 92. Hexin Xingtong Basic Information, Manufacturing Base and Competitors

Table 93. Hexin Xingtong Major Business

Table 94. Hexin Xingtong Civilian Drone Anti-Jamming Navigation Module Product and Services

Table 95. Hexin Xingtong Civilian Drone Anti-Jamming Navigation Module Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 96. Hexin Xingtong Recent Developments/Updates

Table 97. Hexin Xingtong Competitive Strengths & Weaknesses

Table 98. BeiDou Xingtong Basic Information, Manufacturing Base and Competitors

Table 99. BeiDou Xingtong Major Business

Table 100. BeiDou Xingtong Civilian Drone Anti-Jamming Navigation Module Product and Services

Table 101. BeiDou Xingtong Civilian Drone Anti-Jamming Navigation Module Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 102. BeiDou Xingtong Recent Developments/Updates

Table 103. BeiDou Xingtong Competitive Strengths & Weaknesses

Table 104. Mengsheng Electronics Basic Information, Manufacturing Base and Competitors

Table 105. Mengsheng Electronics Major Business

Table 106. Mengsheng Electronics Civilian Drone Anti-Jamming Navigation Module Product and Services

Table 107. Mengsheng Electronics Civilian Drone Anti-Jamming Navigation Module Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 108. Mengsheng Electronics Recent Developments/Updates

Table 109. Mengsheng Electronics Competitive Strengths & Weaknesses

Table 110. Chenyun Satellite Navigation Basic Information, Manufacturing Base and Competitors

Table 111. Chenyun Satellite Navigation Major Business

Table 112. Chenyun Satellite Navigation Civilian Drone Anti-Jamming Navigation Module Product and Services

Table 113. Chenyun Satellite Navigation Civilian Drone Anti-Jamming Navigation Module Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 114. Chenyun Satellite Navigation Recent Developments/Updates

Table 115. Chenyun Satellite Navigation Competitive Strengths & Weaknesses

Table 116. Qianxun Position Basic Information, Manufacturing Base and Competitors

Table 117. Qianxun Position Major Business

Table 118. Qianxun Position Civilian Drone Anti-Jamming Navigation Module Product and Services

Table 119. Qianxun Position Civilian Drone Anti-Jamming Navigation Module Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 120. Qianxun Position Recent Developments/Updates

Table 121. Qianxun Position Competitive Strengths & Weaknesses

Table 122. DJI (D-RTK) Basic Information, Manufacturing Base and Competitors

Table 123. DJI (D-RTK) Major Business

Table 124. DJI (D-RTK) Civilian Drone Anti-Jamming Navigation Module Product and Services

Table 125. DJI (D-RTK) Civilian Drone Anti-Jamming Navigation Module Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 126. DJI (D-RTK) Recent Developments/Updates

Table 127. DJI (D-RTK) Competitive Strengths & Weaknesses

Table 128. Huada BeiDou Basic Information, Manufacturing Base and Competitors

Table 129. Huada BeiDou Major Business

Table 130. Huada BeiDou Civilian Drone Anti-Jamming Navigation Module Product and Services

Table 131. Huada BeiDou Civilian Drone Anti-Jamming Navigation Module Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market

Share (2021-2026)

Table 132. Huada BeiDou Recent Developments/Updates

Table 133. Huada BeiDou Competitive Strengths & Weaknesses

Table 134. Evolution Dynamics Basic Information, Manufacturing Base and Competitors

Table 135. Evolution Dynamics Major Business

Table 136. Evolution Dynamics Civilian Drone Anti-Jamming Navigation Module Product and Services

Table 137. Evolution Dynamics Civilian Drone Anti-Jamming Navigation Module Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 138. Evolution Dynamics Recent Developments/Updates

Table 139. Evolution Dynamics Competitive Strengths & Weaknesses

Table 140. UNIBIRD Basic Information, Manufacturing Base and Competitors

Table 141. UNIBIRD Major Business

Table 142. UNIBIRD Civilian Drone Anti-Jamming Navigation Module Product and Services

Table 143. UNIBIRD Civilian Drone Anti-Jamming Navigation Module Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 144. UNIBIRD Recent Developments/Updates

Table 145. UNIBIRD Competitive Strengths & Weaknesses

Table 146. Honeywell (HANA) Basic Information, Manufacturing Base and Competitors

Table 147. Honeywell (HANA) Major Business

Table 148. Honeywell (HANA) Civilian Drone Anti-Jamming Navigation Module Product and Services

Table 149. Honeywell (HANA) Civilian Drone Anti-Jamming Navigation Module Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 150. Honeywell (HANA) Recent Developments/Updates

Table 151. Honeywell (HANA) Competitive Strengths & Weaknesses

Table 152. ANELLO Photonics Basic Information, Manufacturing Base and Competitors

Table 153. ANELLO Photonics Major Business

Table 154. ANELLO Photonics Civilian Drone Anti-Jamming Navigation Module Product and Services

Table 155. ANELLO Photonics Civilian Drone Anti-Jamming Navigation Module Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 156. ANELLO Photonics Recent Developments/Updates

Table 157. ANELLO Photonics Competitive Strengths & Weaknesses

Table 158. Qianxing Technology Basic Information, Manufacturing Base and Competitors
Table 159. Qianxing Technology Major Business
Table 160. Qianxing Technology Civilian Drone Anti-Jamming Navigation Module Product and Services
Table 161. Qianxing Technology Civilian Drone Anti-Jamming Navigation Module Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 162. Qianxing Technology Recent Developments/Updates
Table 163. Qianxing Technology Competitive Strengths & Weaknesses
Table 164. Ligong Navigation Basic Information, Manufacturing Base and Competitors
Table 165. Ligong Navigation Major Business
Table 166. Ligong Navigation Civilian Drone Anti-Jamming Navigation Module Product and Services
Table 167. Ligong Navigation Civilian Drone Anti-Jamming Navigation Module Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 168. Ligong Navigation Recent Developments/Updates
Table 169. Ligong Navigation Competitive Strengths & Weaknesses
Table 170. HYFIX Spatial Intelligence Basic Information, Manufacturing Base and Competitors
Table 171. HYFIX Spatial Intelligence Major Business
Table 172. HYFIX Spatial Intelligence Civilian Drone Anti-Jamming Navigation Module Product and Services
Table 173. HYFIX Spatial Intelligence Civilian Drone Anti-Jamming Navigation Module Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 174. HYFIX Spatial Intelligence Recent Developments/Updates
Table 175. HYFIX Spatial Intelligence Competitive Strengths & Weaknesses
Table 176. DJI Innovation Basic Information, Manufacturing Base and Competitors
Table 177. DJI Innovation Major Business
Table 178. DJI Innovation Civilian Drone Anti-Jamming Navigation Module Product and Services
Table 179. DJI Innovation Civilian Drone Anti-Jamming Navigation Module Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 180. DJI Innovation Recent Developments/Updates
Table 181. DJI Innovation Competitive Strengths & Weaknesses
Table 182. Puzhou Technology Basic Information, Manufacturing Base and Competitors

Table 183. Puzhou Technology Major Business

Table 184. Puzhou Technology Civilian Drone Anti-Jamming Navigation Module Product and Services

Table 185. Puzhou Technology Civilian Drone Anti-Jamming Navigation Module Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 186. Puzhou Technology Recent Developments/Updates

Table 187. Puzhou Technology Competitive Strengths & Weaknesses

Table 188. Zongheng Shares Basic Information, Manufacturing Base and Competitors

Table 189. Zongheng Shares Major Business

Table 190. Zongheng Shares Civilian Drone Anti-Jamming Navigation Module Product and Services

Table 191. Zongheng Shares Civilian Drone Anti-Jamming Navigation Module Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 192. Zongheng Shares Recent Developments/Updates

Table 193. Zongheng Shares Competitive Strengths & Weaknesses

Table 194. Aerospace Rainbow Basic Information, Manufacturing Base and Competitors

Table 195. Aerospace Rainbow Major Business

Table 196. Aerospace Rainbow Civilian Drone Anti-Jamming Navigation Module Product and Services

Table 197. Aerospace Rainbow Civilian Drone Anti-Jamming Navigation Module Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 198. Aerospace Rainbow Recent Developments/Updates

Table 199. Aerospace Rainbow Competitive Strengths & Weaknesses

Table 200. Global Key Players of Civilian Drone Anti-Jamming Navigation Module Upstream (Raw Materials)

Table 201. Global Civilian Drone Anti-Jamming Navigation Module Typical Customers

Table 202. Civilian Drone Anti-Jamming Navigation Module Typical Distributors

List Of Figures

LIST OF FIGURES

- Figure 1. Civilian Drone Anti-Jamming Navigation Module Picture
- Figure 2. World Civilian Drone Anti-Jamming Navigation Module Production Value: 2021 & 2025 & 2032, (USD Million)
- Figure 3. World Civilian Drone Anti-Jamming Navigation Module Production Value and Forecast (2021-2032) & (USD Million)
- Figure 4. World Civilian Drone Anti-Jamming Navigation Module Production (2021-2032) & (Units)
- Figure 5. World Civilian Drone Anti-Jamming Navigation Module Average Price (2021-2032) & (US\$/Unit)
- Figure 6. World Civilian Drone Anti-Jamming Navigation Module Production Value Market Share by Region (2021-2032)
- Figure 7. World Civilian Drone Anti-Jamming Navigation Module Production Market Share by Region (2021-2032)
- Figure 8. North America Civilian Drone Anti-Jamming Navigation Module Production (2021-2032) & (Units)
- Figure 9. Europe Civilian Drone Anti-Jamming Navigation Module Production (2021-2032) & (Units)
- Figure 10. China Civilian Drone Anti-Jamming Navigation Module Production (2021-2032) & (Units)
- Figure 11. Japan Civilian Drone Anti-Jamming Navigation Module Production (2021-2032) & (Units)
- Figure 12. Civilian Drone Anti-Jamming Navigation Module Market Drivers
- Figure 13. Factors Affecting Demand
- Figure 14. World Civilian Drone Anti-Jamming Navigation Module Consumption (2021-2032) & (Units)
- Figure 15. World Civilian Drone Anti-Jamming Navigation Module Consumption Market Share by Region (2021-2032)
- Figure 16. United States Civilian Drone Anti-Jamming Navigation Module Consumption (2021-2032) & (Units)
- Figure 17. China Civilian Drone Anti-Jamming Navigation Module Consumption (2021-2032) & (Units)
- Figure 18. Europe Civilian Drone Anti-Jamming Navigation Module Consumption (2021-2032) & (Units)
- Figure 19. Japan Civilian Drone Anti-Jamming Navigation Module Consumption (2021-2032) & (Units)

Figure 20. South Korea Civilian Drone Anti-Jamming Navigation Module Consumption (2021-2032) & (Units)

Figure 21. ASEAN Civilian Drone Anti-Jamming Navigation Module Consumption (2021-2032) & (Units)

Figure 22. India Civilian Drone Anti-Jamming Navigation Module Consumption (2021-2032) & (Units)

Figure 23. Producer Shipments of Civilian Drone Anti-Jamming Navigation Module by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for Civilian Drone Anti-Jamming Navigation Module Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for Civilian Drone Anti-Jamming Navigation Module Markets in 2025

Figure 26. United States VS China: Civilian Drone Anti-Jamming Navigation Module Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Civilian Drone Anti-Jamming Navigation Module Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Civilian Drone Anti-Jamming Navigation Module Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers Civilian Drone Anti-Jamming Navigation Module Production Market Share 2025

Figure 30. China Based Manufacturers Civilian Drone Anti-Jamming Navigation Module Production Market Share 2025

Figure 31. Rest of World Based Manufacturers Civilian Drone Anti-Jamming Navigation Module Production Market Share 2025

Figure 32. World Civilian Drone Anti-Jamming Navigation Module Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World Civilian Drone Anti-Jamming Navigation Module Production Value Market Share by Type in 2025

Figure 34. Signal?Level Anti?Jamming (Civilian Grade)

Figure 35. Information?Level Anti?Spoofing (Civilian Grade)

Figure 36. System?Level Alternative Navigation (GNSS?Denied Backup)

Figure 37. World Civilian Drone Anti-Jamming Navigation Module Production Market Share by Type (2021-2032)

Figure 38. World Civilian Drone Anti-Jamming Navigation Module Production Value Market Share by Type (2021-2032)

Figure 39. World Civilian Drone Anti-Jamming Navigation Module Average Price by Type (2021-2032) & (US\$/Unit)

Figure 40. World Civilian Drone Anti-Jamming Navigation Module Production Value by Integration, (USD Million), 2021 & 2025 & 2032

Figure 41. World Civilian Drone Anti-Jamming Navigation Module Production Value Market Share by Integration in 2025

Figure 42. Chip / SoC (Ultra-low power, 1W)

Figure 46. World Civilian Drone Anti-Jamming Navigation Module Production Market Share by Integration (2021-2032)

Figure 47. World Civilian Drone Anti-Jamming Navigation Module Production Value Market Share by Integration (2021-2032)

Figure 48. World Civilian Drone Anti-Jamming Navigation Module Average Price by Integration (2021-2032) & (US\$/Unit)

Figure 49. World Civilian Drone Anti-Jamming Navigation Module Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 50. World Civilian Drone Anti-Jamming Navigation Module Production Value Market Share by Application in 2025

Figure 51. Urban Low-Altitude Logistics

Figure 52. Power Line & Pipeline Inspection

Figure 53. Agricultural Spraying (UAV)

Figure 54. Public Safety & Surveillance

Figure 55. eVTOL / Air Taxi (Urban Air Mobility)

Figure 56. Drone Light Shows (Entertainment)

Figure 57. Others

Figure 58. World Civilian Drone Anti-Jamming Navigation Module Production Market Share by Application (2021-2032)

Figure 59. World Civilian Drone Anti-Jamming Navigation Module Production Value Market Share by Application (2021-2032)

Figure 60. World Civilian Drone Anti-Jamming Navigation Module Average Price by Application (2021-2032) & (US\$/Unit)

Figure 61. Civilian Drone Anti-Jamming Navigation Module Industry Chain

Figure 62. Civilian Drone Anti-Jamming Navigation Module Procurement Model

Figure 63. Civilian Drone Anti-Jamming Navigation Module Sales Model

Figure 64. Civilian Drone Anti-Jamming Navigation Module Sales Channels, Direct Sales, and Distribution

Figure 65. Methodology

Figure 66. Research Process and Data Source

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