

Global Drone Anti-Jamming Navigation Module Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Drone Anti-Jamming Navigation Module market size was valued at US\$ 1338 million in 2025 and is forecast to a readjusted size of US\$ 2825 million by 2032 with a CAGR of 11.2% during review period.

Drone Anti-Jamming Navigation Module refers to a specialized component integrated into the UAV navigation system. Its core function is to maintain reliable Position, Velocity, and Timing information in complex electromagnetic environments where GNSS signals are jammed, spoofed, or unavailable. The technical pathways include: signal-level anti-jamming (adaptive nulling antennas, STAP/SFAP to suppress jamming), information-level anti-spoofing (encryption, signal quality monitoring, cross-validation), and system-level autonomous navigation (vision, inertial, LiDAR, LEO-PNT augmentation, and multi-sensor fusion). Unlike standard GNSS modules, anti-jamming modules feature closed-loop jamming perception, identification, and countermeasure capabilities, enhancing combat survivability and mission reliability under electronic warfare and complex EM conditions.

Drone anti-jamming navigation modules serve as the "last line of defense" for military UAVs in complex electromagnetic environments, and a "safety admission ticket" for civilian drones entering urban low-altitude airspace. The technological essence is upgrading from passive satellite signal reception to an active closed-loop system that senses, identifies, and counters jamming/spoofing. Pricing: chip-level or OEM modules (e.g., u-blox ZED-X20P, Septentrio mosaic) cost USD 100-300, providing basic signal-level anti-jamming; adding anti-spoofing raises cost to USD 300-800; system-level alternative navigation (vision/INS/LiDAR fusion) can cost USD

2,000?10,000, primarily for large military UAVs or eVTOL. Margins vary dramatically: civilian GNSS modules gross margin 10?15%; dedicated anti-jamming modules 40?50%; military-grade systems (e.g., NovAtel GAJT?AE3, infiniDome AuraCore) often exceed 60% due to certification barriers and unique functionality. Downstream: military tactical UAVs account for ~50% of module consumption, strategic UAVs/UCAVs ~20%, civilian industrial drones ~20%, UAM/eVTOL and counter-UAS ~10%. Incremental demand comes from: (1) rising global military spending and battlefield validation (Russia-Ukraine, Middle East) pushing anti-jamming penetration from ~30% to >60% on military UAVs; (2) China's low-altitude economy policies mandating redundant navigation for eVTOL and large drones ? effectively requiring anti-jamming or alternative navigation; (3) declining cost of chip-level anti-jamming (e.g., oneNav L5?direct, Huada BeiDou SoC) enabling penetration into sub-USD 1,000 industrial drones. Upstream-downstream structure: upstream ? RF front-ends, antenna arrays, IMUs, vision sensors, LiDAR, GNSS baseband IP (Hexin, Huada, Septentrio); midstream ? module/system integrators (NovAtel, infiniDome, TUALCOM, Mengsheng, Chenyun, Honeywell, Evolution Dynamics); downstream ? drone OEMs (DJI, Zongheng, Aerospace Rainbow, PuZhou) and end users (military, government, inspection companies). Landscape features ? Israel/Europe/US leading signal-level, China catching up; China and US running neck-and-neck in system-level alternative navigation?. Signal-level: NovAtel (Canada), infiniDome (Israel), TUALCOM (Israel), Thales (France) dominate high-end; Chinese players (Mengsheng, Chenyun, Sinan, Huace) are rapidly replacing imports in military and industrial segments. Anti-spoofing: FYX Nav, Beijing Xingli, LOCOSYS offer differentiated algorithms. Alternative navigation: Honeywell HANA represents US military standard; Evolution Dynamics and UNIBIRD have launched consumer VIO modules (N200 series, USD 399, ?2% drift) approaching advanced levels; Vermeer, ASIO, Titra offer niche technologies. Chinese military-industrial system (Ligong Navigation, Chenxi, North Navigation, Times Feipeng) focuses on INS/vision/radar fusion for defense. Uncertainties: (1) EW arms race ? adversarial jammers become more powerful and spoofing more intelligent, requiring continuous algorithm upgrades; (2) alternative navigation still not as robust as GNSS in urban canyons or bad weather; (3) LEO-PNT commercialization speed (e.g., Qianxun, Mouxing) could shift the competitive landscape; (4) if chip-level anti-jamming matures and drops in price, it will accelerate civilian penetration but compress module-level margins; (5) export controls restrict Chinese players' overseas expansion. Conclusion: Anti-jamming navigation modules are a must-have component for drones to evolve from consumer electronics to mission-critical equipment. Core drivers are battlefield EW demand, low-altitude economy safety regulations, and reliability anxiety for high-precision navigation in complex environments. Structural features are clear technology tiering (signal/information/system), parallel military and civilian markets with

common technology roots, and system-level alternative navigation as the medium-term growth engine. Over the next five years, suppliers with full-stack capability (signal+information+system) will dominate military markets, while chip/OEM players with superior cost control will capture the largest civilian growth.

This report is a detailed and comprehensive analysis for global Drone Anti-Jamming Navigation Module market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Drone Anti-Jamming Navigation Module market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Drone Anti-Jamming Navigation Module market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Drone Anti-Jamming Navigation Module market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Drone Anti-Jamming Navigation Module market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (US\$/Unit), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Drone Anti-Jamming Navigation Module

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Drone Anti-Jamming Navigation Module market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include NovAtel (Hexagon), infiniDome, TUALCOM, Thales, Mengsheng Electronics, Chenyun Satellite Navigation, Aerospace Development, Sinan Navigation, Huace Navigation, Haige Communications, etc.

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

Market Segmentation

Drone Anti-Jamming Navigation Module market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Signal?Level Anti?Jamming (Jamming Suppression)

Information?Level Anti?Spoofing

System?Level Alternative Navigation

Market segment by Integration

Chip / SoC

OEM Module

Integrated System (Box?Level)

Sensor?Fusion Engine

Market segment by Application

Military Tactical UAVs

Strategic UAVs / UCAVs

Civilian Industrial Drones

Urban Air Mobility (UAM/eVTOL)

Counter-UAS Systems (Interceptor Drones)

Others

Major players covered

NovAtel (Hexagon)

infiniDome

TUALCOM

Thales

Mengsheng Electronics

Chenyun Satellite Navigation

Aerospace Development

Sinan Navigation

Huace Navigation

Haige Communications

Hexin Xingtong

u-blox

Septentrio

Beijing Xingli Technology

FYX Nav (Aeroer)

OKSI

LOCOSYS

Honeywell

Evolution Dynamics

UNIBIRD

Vermeer

Tianjian Jiguang

ASIO

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Huada BeiDou

oneNav

Leixun Innovation

BeiDou Xingtong

Puzhou Technology

Infortrend

Zongheng Shares

Aerospace Rainbow

Guandian Defense

Hongdu Aviation

Market segment by region, regional analysis covers

Global Drone Anti-Jamming Navigation Module Market 2026 by Manufacturers, Regions, Type and Application, Forec...

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Drone Anti-Jamming Navigation Module product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Drone Anti-Jamming Navigation Module, with price, sales quantity, revenue, and global market share of Drone Anti-Jamming Navigation Module from 2021 to 2026.

Chapter 3, the Drone Anti-Jamming Navigation Module competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Drone Anti-Jamming Navigation Module breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Drone Anti-Jamming Navigation Module market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five

Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Drone Anti-Jamming Navigation Module.

Chapter 14 and 15, to describe Drone Anti-Jamming Navigation Module sales channel, distributors, customers, research findings and conclusion.

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