

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

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Abstracts

The global Drone Anti-Jamming Navigation Module market size is expected to reach \$ 2825 million by 2032, rising at a market growth of 11.2% CAGR during the forecast period (2026-2032).

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 studies the global 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 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 Drone Anti-Jamming Navigation Module that contribute to its increasing demand across many markets.

Highlights and key features of the study

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

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

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

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

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

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

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

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

This report profiles key players in the global 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 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World 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 Drone Anti-Jamming Navigation Module Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

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

Signal?Level Anti?Jamming (Jamming Suppression)

Information?Level Anti?Spoofing

System?Level Alternative Navigation

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

Chip / SoC

OEM Module

Integrated System (Box?Level)

Sensor?Fusion Engine

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

Military Tactical UAVs

Strategic UAVs / UCAVs

Civilian Industrial Drones

Urban Air Mobility (UAM/eVTOL)

Counter?UAS Systems (Interceptor Drones)

Others

Companies Profiled:

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)

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Chengxin Zhilian

Zhixiang Technology

Yunsheng Intelligence

Qianxun Position

Mouxing Technology

Huada BeiDou

oneNav

Leixun Innovation

BeiDou Xingtong

Puzhou Technology

Infortrend

Zongheng Shares

Aerospace Rainbow

Guandian Defense

Hongdu Aviation

Key Questions Answered:

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

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