

Global GNSS/INS Integrated Navigation Systems Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G9B1D5176F39EN.html>

Date: June 2026

Pages: 172

Price: US\$ 4,480.00 (Single User License)

ID: G9B1D5176F39EN

Abstracts

The global GNSS/INS Integrated Navigation Systems market size is expected to reach \$ 3092 million by 2032, rising at a market growth of 9.3% CAGR during the forecast period (2026-2032).

GNSS/INS Integrated Navigation Systems refer to professional navigation products that combine a Global Navigation Satellite System receiver or positioning module, an inertial measurement unit or inertial navigation unit, and sensor-fusion navigation algorithms within a module, OEM board, rugged enclosure, avionics unit or platform-level navigation architecture. The systems are designed to provide position, velocity, attitude, heading, roll, pitch, angular rate, acceleration, trajectory and timing outputs for vehicles, autonomous machines, UAVs, marine platforms, mobile mapping systems, aerospace platforms and defence applications.

The core value of this product category lies in fusing the absolute positioning capability of GNSS with the continuous, high-rate motion measurement capability of IMU/INS, thereby improving navigation continuity and robustness in urban canyons, tunnels, ports, mines, forests, bridges, offshore environments, low-altitude operations and short GNSS-outage scenarios.

Depending on product form factor and performance class, indicative prices range from roughly USD 15–300 for automotive-grade GNSS+MEMS integrated positioning modules, USD 300–3,000 for industrial embedded GNSS/INS modules, USD 3,000–45,000 for survey-grade or mobile-mapping GNSS/INS systems, and tens of thousands to more than USD 200,000 for aerospace, defence, marine and high-end FOG/HRG-based integrated navigation systems.

Based on our research, the GNSS/INS integrated navigation system industry should not be interpreted as a broad GNSS receiver market, nor as a stand-alone inertial sensor market. It is a professional sensor-fusion navigation equipment market built around continuous, reliable and high-accuracy positioning and attitude determination. The technical foundation of the industry combines GNSS absolute positioning, IMU/INS high-rate motion sensing, RTK or PPP augmentation, Kalman filtering and multi-sensor integration. GNSS provides strong absolute positioning performance in open-sky environments but may suffer from signal blockage, multipath, discontinuity or spoofing in urban canyons, tunnels, ports, forests, mines and contested electromagnetic environments. INS provides continuity and high-frequency outputs but accumulates errors over time. The fusion of both technologies therefore creates a differentiated value proposition in continuity, attitude stability and trajectory reliability. For this reason, the statistical scope of this report is limited to hardware systems, modules, OEM boards and tightly associated navigation software that integrate both GNSS and inertial navigation capabilities.

From a supply-side perspective, the global market is structured around high-end North American and European system providers, fast-growing Chinese automotive and industrial module suppliers, and a smaller set of regional Japanese, Korean and Taiwanese participants. Hexagon/NovAtel, Trimble/Applanix, Honeywell, Northrop Grumman, Safran, SBG Systems, OxTS, Advanced Navigation, VectorNav and VIAVI/Inertial Labs are well positioned in high-precision GNSS/INS, mobile mapping, aerospace, defence, APNT and autonomous platforms. Chinese suppliers such as CHC Navigation, Unicore Communications, Asensing, Bynav, BDStar, SinoGNSS and StarNeto are increasingly visible in automotive-grade GNSS+MEMS modules, integrated navigation boxes, BeiDou/GNSS boards and intelligent-vehicle positioning units. Japan, South Korea and Taiwan provide additional regional supply through inertial sensing, aerospace navigation, UAV navigation and specialised industrial applications, although public financial transparency remains lower for many of these players.

From a demand-side perspective, growth is no longer confined to traditional survey, marine and airborne mapping. Incremental demand is increasingly driven by intelligent vehicles, ADAS testing, robotics, UAVs, unmanned surface vessels, precision agriculture, construction machinery, mining automation and defence-grade resilient navigation. Automotive-grade integrated positioning modules are characterised by lower ASPs and higher shipment elasticity, supported by localisation needs in advanced driving systems. Survey and mobile mapping customers place greater emphasis on attitude accuracy, post-processing capability and time synchronisation with LiDAR or imaging payloads. UAV and robotics customers prioritise size, weight, power, SDK

integration and reliable navigation during short GNSS outages. Defence and aerospace users focus on anti-jamming, spoofing resilience, GNSS-denied operation, M-code compatibility and high-grade inertial technologies such as FOG, RLG or HRG. The market is therefore expected to evolve along two parallel tracks: volume expansion in lower-cost automotive and industrial modules, and project-based value growth in high-end aerospace, defence and marine systems.

From an industry-dynamics perspective, recent M&A activity confirms the strategic value of resilient positioning and inertial navigation technologies. Hexagon's acquisition of Septentrio strengthens its high-precision GNSS and autonomy-positioning portfolio, while VIAVI's acquisition of Inertial Labs highlights the growing importance of APNT and inertial navigation assets in autonomous and defence-related markets. At the same time, defence demand in the United States and Europe is being reinforced by GNSS jamming, spoofing and contested-environment requirements, while China's market is supported by BeiDou industrialisation, automotive-grade positioning, intelligent driving and domestic supply-chain substitution. Overall, the GNSS/INS integrated navigation system market is expected to maintain solid growth through 2032. However, competition will remain segmented: high-end defence and aerospace systems will compete on certification, reliability and programme history; automotive and industrial modules will compete on cost, production scalability, algorithms and ecosystem integration; and geospatial systems will compete on accuracy, stability and end-to-end software workflow.

This report studies the global GNSS/INS Integrated Navigation Systems production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for GNSS/INS Integrated Navigation Systems 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 GNSS/INS Integrated Navigation Systems that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global GNSS/INS Integrated Navigation Systems total production and demand, 2021-2032, (K Units)

Global GNSS/INS Integrated Navigation Systems total production value, 2021-2032, (USD Million)

Global GNSS/INS Integrated Navigation Systems production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production

site)

Global GNSS/INS Integrated Navigation Systems consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: GNSS/INS Integrated Navigation Systems domestic production, consumption, key domestic manufacturers and share

Global GNSS/INS Integrated Navigation Systems production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global GNSS/INS Integrated Navigation Systems production by Product Form Factor, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global GNSS/INS Integrated Navigation Systems production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global GNSS/INS Integrated Navigation Systems 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 Hexagon AB, Trimble, Honeywell, Northrop Grumman, Safran Electronics & Defense, SBG Systems, Advanced Navigation, OxTS, VIAVI, VectorNav, 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 GNSS/INS Integrated Navigation Systems 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 Product Form Factor, 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 GNSS/INS Integrated Navigation Systems Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global GNSS/INS Integrated Navigation Systems Market, Segmentation by Product Form Factor:

Rugged Integrated GNSS/INS Unit

OEM Board / Module

Avionics / Defence Navigation Unit

Other

Global GNSS/INS Integrated Navigation Systems Market, Segmentation by Inertial Sensor Class:

Automotive / Industrial MEMS

Tactical-grade MEMS / Quartz MEMS

FOG / RLG / HRG-based Systems

Other

Global GNSS/INS Integrated Navigation Systems Market, Segmentation by Integration Architecture:

Loosely Coupled GNSS/INS

Tightly Coupled GNSS/INS

Deeply Coupled / Multi-sensor Fusion

Other

Global GNSS/INS Integrated Navigation Systems Market, Segmentation by Application:

Automotive and Autonomous Mobility

Surveying, Mapping and Geospatial

UAV, USV, AUV and Robotics

Aerospace, Defence and Marine

Other

Companies Profiled:

Hexagon AB

Trimble

Honeywell

Northrop Grumman

Safran Electronics & Defense

SBG Systems

Advanced Navigation

OxTS

VIAVI

VectorNav

Exail

EMCORE

CHC Navigation

Unicore Communications

Asensing

Bynav

BDStar

StarNeto

SinoGNSS

Septentrio

Movella

HBK

FIBERPRO

Fixposition

u-blox

Key Questions Answered:

1. How big is the global GNSS/INS Integrated Navigation Systems market?
2. What is the demand of the global GNSS/INS Integrated Navigation Systems market?

3. What is the year over year growth of the global GNSS/INS Integrated Navigation Systems market?
4. What is the production and production value of the global GNSS/INS Integrated Navigation Systems market?
5. Who are the key producers in the global GNSS/INS Integrated Navigation Systems market?
6. What are the growth factors driving the market demand?

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