

Global GNSS/INS Integrated Navigation Systems Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

<https://marketpublishers.com/r/GAC48B617633EN.html>

Date: June 2026

Pages: 153

Price: US\$ 3,480.00 (Single User License)

ID: GAC48B617633EN

Abstracts

According to our (Global Info Research) latest study, the global GNSS/INS Integrated Navigation Systems market size was valued at US\$ 1626 million in 2025 and is forecast to a readjusted size of US\$ 3092 million by 2032 with a CAGR of 9.3% during review period.

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 is a detailed and comprehensive analysis for global GNSS/INS Integrated Navigation Systems market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Product Form Factor 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 GNSS/INS Integrated Navigation Systems market size and forecasts, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global GNSS/INS Integrated Navigation Systems market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global GNSS/INS Integrated Navigation Systems market size and forecasts, by Product Form Factor and by Application, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global GNSS/INS Integrated Navigation Systems market shares of main players, shipments in revenue (\$ Million), sales quantity (K 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 GNSS/INS Integrated Navigation Systems

- 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 GNSS/INS Integrated Navigation Systems 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 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.

Market Segmentation

GNSS/INS Integrated Navigation Systems market is split by Product Form Factor and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Product Form Factor, 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 Product Form Factor

Rugged Integrated GNSS/INS Unit

OEM Board / Module

Avionics / Defence Navigation Unit

Other

Market segment by Inertial Sensor Class

Automotive / Industrial MEMS

Tactical-grade MEMS / Quartz MEMS

FOG / RLG / HRG-based Systems

Other

Market segment by Integration Architecture

Loosely Coupled GNSS/INS

Tightly Coupled GNSS/INS

Deeply Coupled / Multi-sensor Fusion

Other

Market segment by Application

Automotive and Autonomous Mobility

Surveying, Mapping and Geospatial

UAV, USV, AUV and Robotics

Aerospace, Defence and Marine

Other

Major players covered

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

Market segment by region, regional analysis covers

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 GNSS/INS Integrated Navigation Systems product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of GNSS/INS Integrated Navigation Systems, with price, sales quantity, revenue, and global market share of GNSS/INS Integrated Navigation Systems from 2021 to 2026.

Chapter 3, the GNSS/INS Integrated Navigation Systems competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the GNSS/INS Integrated Navigation Systems 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 Product Form Factor and by Application, with sales market share and growth rate by Product Form Factor, 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 GNSS/INS Integrated Navigation Systems market forecast, by regions, by Product Form Factor, 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 GNSS/INS Integrated Navigation Systems.

Chapter 14 and 15, to describe GNSS/INS Integrated Navigation Systems sales channel, distributors, customers, research findings and conclusion.

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