

Global Navigation Warfare and GNSS Countermeasure / Protection Systems 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 Navigation Warfare and GNSS Countermeasure / Protection Systems market size was valued at US\$ 3272 million in 2025 and is forecast to a readjusted size of US\$ 6017 million by 2032 with a CAGR of 9.0% during review period.

Navigation warfare and GNSS countermeasure/protection systems are specialized systems, devices, modules, software platforms, and test solutions designed to protect, verify, monitor, simulate, and sustain positioning, navigation, and timing performance in contested electromagnetic environments. These products are used when GNSS signals are jammed, spoofed, denied, degraded, or otherwise unreliable, enabling platforms and critical systems to maintain continuous and trusted PNT capability. The category typically includes GNSS anti-jam antennas and antenna electronics, protected GNSS receivers, anti-spoofing and integrity-monitoring modules, interference detection and alerting equipment, NAVWAR simulation and test systems, protected timing devices, and integrated assured-PNT solutions. Core functions include interference suppression, spoofing detection, abnormal-signal monitoring, navigation continuity assurance, trusted timing protection, and performance validation under navigation-warfare scenarios, with applications in defense platforms, unmanned systems, aviation and maritime safety, critical infrastructure timing, test ranges, and high-reliability navigation environments.

Navigation warfare and GNSS countermeasure/protection systems should be viewed as a contested-PNT industry rather than a conventional satellite-navigation device market. The core value lies in preserving, verifying, monitoring, or testing positioning, navigation, and timing information when GNSS signals are jammed, spoofed, degraded, or denied. In global terminology, suppliers more often use NAVWAR, assured PNT,

resilient PNT, GNSS anti-jam, GPS anti-jamming, anti-spoofing, and CRPA-based protection rather than a direct translation of ?navigation countermeasure system.? This report therefore adopts a narrow professional scope, covering anti-jam antennas and antenna electronics, protected GNSS receivers, anti-spoofing timing modules, interference monitoring systems, NAVWAR simulation and test platforms, and alternative PNT elements directly tied to countermeasure or protection use cases.

Demand is shifting from a defense-only procurement pattern toward a broader high-reliability PNT architecture. Military aircraft, missiles, UAVs, armored vehicles, and naval platforms remain the largest revenue base, but incremental growth is increasingly tied to small unmanned systems, counter-UAS operations, resilient timing for telecom and power infrastructure, maritime navigation resilience, and aviation GNSS interference awareness. The rise of reported GNSS jamming and spoofing incidents in Europe and the Middle East reinforces the need for resilient PNT as a baseline capability rather than a niche upgrade.

Technology competition is moving from single-function protection toward layered assurance. CRPA and null-steering remain central for high-end anti-jamming, but receiver-level spoofing detection, multi-frequency and multi-constellation processing, signal authentication, GNSS/INS fusion, alternative PNT, LEO-based timing, and NAVWAR simulation are becoming equally important. The likely winners will be suppliers that can combine antenna hardware, protected receivers, software-based integrity monitoring, platform integration, and qualification testing into a deployable system architecture.

This report is a detailed and comprehensive analysis for global Navigation Warfare and GNSS Countermeasure / Protection Systems 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 Navigation Warfare and GNSS Countermeasure / Protection Systems market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

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

Global Navigation Warfare and GNSS Countermeasure / Protection Systems 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 Navigation Warfare and GNSS Countermeasure / Protection Systems 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 Navigation Warfare and GNSS Countermeasure / Protection 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 Navigation Warfare and GNSS Countermeasure / Protection 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 RTX Corporation, BAE Systems plc, L3Harris Technologies, Keysight Technologies, Inc., Rohde & Schwarz GmbH & Co. KG, Safran S.A., VIAVI Solutions Inc., Iridium Communications Inc., Hexagon AB, Furuno Electric Co., Ltd., etc.

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

Market Segmentation

Navigation Warfare and GNSS Countermeasure / Protection Systems 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

Anti-jam Antenna System

Protected GNSS Receiver / Module

Other

Market segment by Technology Route

CRPA / Null Steering

Beamforming

Multi-source PNT Fusion

Other

Market segment by Threat Type

Jamming Threat

Spoofing Threat

GNSS Denial / Outage

Mixed Threat Environment

Other

Market segment by Deployment Form

Rack-mounted System

Portable / Man-portable System

Other

Market segment by Application

Platform Navigation Protection

Precision Timing Protection

Interference Monitoring & Alerting

NAVWAR Training & Evaluation

PNT Resilience Backup

Other

Major players covered

RTX Corporation

BAE Systems plc

L3Harris Technologies

Keysight Technologies, Inc.

Rohde & Schwarz GmbH & Co. KG

Safran S.A.

VIavi Solutions Inc.

Iridium Communications Inc.

Hexagon AB

Furuno Electric Co., Ltd.

Septentrio NV

Qascom S.r.l.

AccuBeat Ltd.

CAST Navigation, LLC

Syntony GNSS

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 Navigation Warfare and GNSS Countermeasure / Protection Systems product scope, market overview, market estimation caveats and base year.

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

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

Chapter 4, the Navigation Warfare and GNSS Countermeasure / Protection 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 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 Navigation Warfare and GNSS Countermeasure / Protection Systems 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 Navigation Warfare and GNSS Countermeasure / Protection Systems.

Chapter 14 and 15, to describe Navigation Warfare and GNSS Countermeasure / Protection Systems sales channel, distributors, customers, research findings and conclusion.

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