

Global GNSS/INS Integrated Navigation Systems Market Growth 2026-2032

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Abstracts

The global GNSS/INS Integrated Navigation Systems market size is predicted to grow from US\$ 1546 million in 2025 to US\$ 3035 million in 2032; it is expected to grow at a CAGR of 9.9% from 2026 to 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.

LP Information, Inc. (LPI) ' newest research report, the "GNSS/INS Integrated Navigation Systems Industry Forecast" looks at past sales and reviews total world GNSS/INS Integrated Navigation Systems sales in 2025, providing a comprehensive analysis by region and market sector of projected GNSS/INS Integrated Navigation Systems sales for 2026 through 2032. With GNSS/INS Integrated Navigation Systems sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world GNSS/INS Integrated Navigation Systems industry.

This Insight Report provides a comprehensive analysis of the global GNSS/INS Integrated Navigation Systems landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on GNSS/INS Integrated Navigation Systems portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global GNSS/INS Integrated Navigation

Systems market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for GNSS/INS Integrated Navigation Systems and breaks down the forecast by Product Form Factor, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global GNSS/INS Integrated Navigation Systems.

This report presents a comprehensive overview, market shares, and growth opportunities of GNSS/INS Integrated Navigation Systems market by product type, application, key manufacturers and key regions and countries.

Segmentation by Product Form Factor:

Rugged Integrated GNSS/INS Unit

OEM Board / Module

Avionics / Defence Navigation Unit

Other

Segmentation by Inertial Sensor Class:

Automotive / Industrial MEMS

Tactical-grade MEMS / Quartz MEMS

FOG / RLG / HRG-based Systems

Other

Segmentation by Integration Architecture:

Loosely Coupled GNSS/INS

Tightly Coupled GNSS/INS

Deeply Coupled / Multi-sensor Fusion

Other

Segmentation by Application:

Automotive and Autonomous Mobility

Surveying, Mapping and Geospatial

UAV, USV, AUV and Robotics

Aerospace, Defence and Marine

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

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 Addressed in this Report

What is the 10-year outlook for the global GNSS/INS Integrated Navigation Systems market?

What factors are driving GNSS/INS Integrated Navigation Systems market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do GNSS/INS Integrated Navigation Systems market opportunities vary by end market size?

How does GNSS/INS Integrated Navigation Systems break out by Product Form Factor, by Application?

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