

Global Navigation Warfare and GNSS Countermeasure / Protection Systems Market Growth 2026-2032

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Abstracts

The global Navigation Warfare and GNSS Countermeasure / Protection Systems market size is predicted to grow from US\$ 3111 million in 2025 to US\$ 5899 million in 2032; it is expected to grow at a CAGR of 9.5% from 2026 to 2032.

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.

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

This Insight Report provides a comprehensive analysis of the global Navigation Warfare and GNSS Countermeasure / Protection 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 Navigation Warfare and GNSS Countermeasure / Protection Systems portfolios and capabilities, market entry strategies, market positions,

and geographic footprints, to better understand these firms' unique position in an accelerating global Navigation Warfare and GNSS Countermeasure / Protection Systems market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Navigation Warfare and GNSS Countermeasure / Protection Systems and breaks down the forecast by Type, 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 Navigation Warfare and GNSS Countermeasure / Protection Systems.

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

Segmentation by Type:

Anti-jam Antenna System

Protected GNSS Receiver / Module

Other

Segmentation by Technology Route:

CRPA / Null Steering

Beamforming

Multi-source PNT Fusion

Other

Segmentation by Threat Type:

Jamming Threat

Spoofing Threat

GNSS Denial / Outage

Mixed Threat Environment

Other

Segmentation by Deployment Form:

Rack-mounted System

Portable / Man-portable System

Other

Segmentation by Application:

Platform Navigation Protection

Precision Timing Protection

Interference Monitoring & Alerting

NAVWAR Training & Evaluation

PNT Resilience Backup

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.

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

Key Questions Addressed in this Report

What is the 10-year outlook for the global Navigation Warfare and GNSS

Countermeasure / Protection Systems market?

What factors are driving Navigation Warfare and GNSS Countermeasure / Protection Systems market growth, globally and by region?

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

How do Navigation Warfare and GNSS Countermeasure / Protection Systems market opportunities vary by end market size?

How does Navigation Warfare and GNSS Countermeasure / Protection Systems break out by Type, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview

2.1.1 Global Navigation Warfare and GNSS Countermeasure / Protection Systems
Annual Sales 2021-2032

2.1.2 World Current & Future Analysis for Navigation Warfare and GNSS
Countermeasure / Protection Systems by Geographic Region, 2021, 2025 & 2032

2.1.3 World Current & Future Analysis for Navigation Warfare and GNSS
Countermeasure / Protection Systems by Country/Region, 2021, 2025 & 2032

2.2 Navigation Warfare and GNSS Countermeasure / Protection Systems Segment by Type

2.2.1 Anti-jam Antenna System

2.2.2 Protected GNSS Receiver / Module

2.2.3 Other

2.2.4 Navigation Warfare and GNSS Countermeasure / Protection Systems Sales by Type

2.2.4.1 Global Navigation Warfare and GNSS Countermeasure / Protection Systems
Sales Market Share by Type (2021-2026)

2.2.4.2 Global Navigation Warfare and GNSS Countermeasure / Protection Systems
Revenue and Market Share by Type (2021-2026)

2.2.4.3 Global Navigation Warfare and GNSS Countermeasure / Protection Systems
Sale Price by Type (2021-2026)

2.3 Navigation Warfare and GNSS Countermeasure / Protection Systems Segment by Technology Route

2.3.1 CRPA / Null Steering

2.3.2 Beamforming

2.3.3 Multi-source PNT Fusion

2.3.4 Other

2.3.5 Navigation Warfare and GNSS Countermeasure / Protection Systems Sales by Technology Route

2.3.5.1 Global Navigation Warfare and GNSS Countermeasure / Protection Systems Sales Market Share by Technology Route (2021-2026)

2.3.5.2 Global Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue and Market Share by Technology Route (2021-2026)

2.3.5.3 Global Navigation Warfare and GNSS Countermeasure / Protection Systems Sale Price by Technology Route (2021-2026)

2.4 Navigation Warfare and GNSS Countermeasure / Protection Systems Segment by Threat Type

2.4.1 Jamming Threat

2.4.2 Spoofing Threat

2.4.3 GNSS Denial / Outage

2.4.4 Mixed Threat Environment

2.4.5 Other

2.4.6 Navigation Warfare and GNSS Countermeasure / Protection Systems Sales by Threat Type

2.4.6.1 Global Navigation Warfare and GNSS Countermeasure / Protection Systems Sales Market Share by Threat Type (2021-2026)

2.4.6.2 Global Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue and Market Share by Threat Type (2021-2026)

2.4.6.3 Global Navigation Warfare and GNSS Countermeasure / Protection Systems Sale Price by Threat Type (2021-2026)

2.5 Navigation Warfare and GNSS Countermeasure / Protection Systems Segment by Deployment Form

2.5.1 Rack-mounted System

2.5.2 Portable / Man-portable System

2.5.3 Other

2.5.4 Navigation Warfare and GNSS Countermeasure / Protection Systems Sales by Deployment Form

2.5.4.1 Global Navigation Warfare and GNSS Countermeasure / Protection Systems Sales Market Share by Deployment Form (2021-2026)

2.5.4.2 Global Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue and Market Share by Deployment Form (2021-2026)

2.5.4.3 Global Navigation Warfare and GNSS Countermeasure / Protection Systems Sale Price by Deployment Form (2021-2026)

2.6 Navigation Warfare and GNSS Countermeasure / Protection Systems Segment by

Application

2.6.1 Platform Navigation Protection

2.6.2 Precision Timing Protection

2.6.3 Interference Monitoring & Alerting

2.6.4 NAVWAR Training & Evaluation

2.6.5 PNT Resilience Backup

2.6.6 Other

2.6.7 Navigation Warfare and GNSS Countermeasure / Protection Systems Sales by Application

2.6.7.1 Global Navigation Warfare and GNSS Countermeasure / Protection Systems Sale Market Share by Application (2021-2026)

2.6.7.2 Global Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue and Market Share by Application (2021-2026)

2.6.7.3 Global Navigation Warfare and GNSS Countermeasure / Protection Systems Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Navigation Warfare and GNSS Countermeasure / Protection Systems Breakdown Data by Company

3.1.1 Global Navigation Warfare and GNSS Countermeasure / Protection Systems Annual Sales by Company (2021-2026)

3.1.2 Global Navigation Warfare and GNSS Countermeasure / Protection Systems Sales Market Share by Company (2021-2026)

3.2 Global Navigation Warfare and GNSS Countermeasure / Protection Systems Annual Revenue by Company (2021-2026)

3.2.1 Global Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue by Company (2021-2026)

3.2.2 Global Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue Market Share by Company (2021-2026)

3.3 Global Navigation Warfare and GNSS Countermeasure / Protection Systems Sale Price by Company

3.4 Key Manufacturers Navigation Warfare and GNSS Countermeasure / Protection Systems Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers Navigation Warfare and GNSS Countermeasure / Protection Systems Product Location Distribution

3.4.2 Players Navigation Warfare and GNSS Countermeasure / Protection Systems Products Offered

3.5 Market Concentration Rate Analysis

- 3.5.1 Competition Landscape Analysis
- 3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
- 3.6 New Products and Potential Entrants
- 3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR NAVIGATION WARFARE AND GNSS COUNTERMEASURE / PROTECTION SYSTEMS BY GEOGRAPHIC REGION

- 4.1 World Historic Navigation Warfare and GNSS Countermeasure / Protection Systems Market Size by Geographic Region (2021-2026)
 - 4.1.1 Global Navigation Warfare and GNSS Countermeasure / Protection Systems Annual Sales by Geographic Region (2021-2026)
 - 4.1.2 Global Navigation Warfare and GNSS Countermeasure / Protection Systems Annual Revenue by Geographic Region (2021-2026)
- 4.2 World Historic Navigation Warfare and GNSS Countermeasure / Protection Systems Market Size by Country/Region (2021-2026)
 - 4.2.1 Global Navigation Warfare and GNSS Countermeasure / Protection Systems Annual Sales by Country/Region (2021-2026)
 - 4.2.2 Global Navigation Warfare and GNSS Countermeasure / Protection Systems Annual Revenue by Country/Region (2021-2026)
- 4.3 Americas Navigation Warfare and GNSS Countermeasure / Protection Systems Sales Growth
- 4.4 APAC Navigation Warfare and GNSS Countermeasure / Protection Systems Sales Growth
- 4.5 Europe Navigation Warfare and GNSS Countermeasure / Protection Systems Sales Growth
- 4.6 Middle East & Africa Navigation Warfare and GNSS Countermeasure / Protection Systems Sales Growth

5 AMERICAS

- 5.1 Americas Navigation Warfare and GNSS Countermeasure / Protection Systems Sales by Country
 - 5.1.1 Americas Navigation Warfare and GNSS Countermeasure / Protection Systems Sales by Country (2021-2026)
 - 5.1.2 Americas Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue by Country (2021-2026)
- 5.2 Americas Navigation Warfare and GNSS Countermeasure / Protection Systems Sales by Type (2021-2026)

5.3 Americas Navigation Warfare and GNSS Countermeasure / Protection Systems

Sales by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Navigation Warfare and GNSS Countermeasure / Protection Systems Sales by Region

6.1.1 APAC Navigation Warfare and GNSS Countermeasure / Protection Systems Sales by Region (2021-2026)

6.1.2 APAC Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue by Region (2021-2026)

6.2 APAC Navigation Warfare and GNSS Countermeasure / Protection Systems Sales by Type (2021-2026)

6.3 APAC Navigation Warfare and GNSS Countermeasure / Protection Systems Sales by Application (2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

6.10 China Taiwan

7 EUROPE

7.1 Europe Navigation Warfare and GNSS Countermeasure / Protection Systems by Country

7.1.1 Europe Navigation Warfare and GNSS Countermeasure / Protection Systems Sales by Country (2021-2026)

7.1.2 Europe Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue by Country (2021-2026)

7.2 Europe Navigation Warfare and GNSS Countermeasure / Protection Systems Sales by Type (2021-2026)

7.3 Europe Navigation Warfare and GNSS Countermeasure / Protection Systems Sales by Application (2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Navigation Warfare and GNSS Countermeasure / Protection Systems by Country

8.1.1 Middle East & Africa Navigation Warfare and GNSS Countermeasure / Protection Systems Sales by Country (2021-2026)

8.1.2 Middle East & Africa Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue by Country (2021-2026)

8.2 Middle East & Africa Navigation Warfare and GNSS Countermeasure / Protection Systems Sales by Type (2021-2026)

8.3 Middle East & Africa Navigation Warfare and GNSS Countermeasure / Protection Systems Sales by Application (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of Navigation Warfare and GNSS Countermeasure / Protection Systems

10.3 Manufacturing Process Analysis of Navigation Warfare and GNSS Countermeasure / Protection Systems

10.4 Industry Chain Structure of Navigation Warfare and GNSS Countermeasure / Protection Systems

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Navigation Warfare and GNSS Countermeasure / Protection Systems Distributors

11.3 Navigation Warfare and GNSS Countermeasure / Protection Systems Customer

12 WORLD FORECAST REVIEW FOR NAVIGATION WARFARE AND GNSS COUNTERMEASURE / PROTECTION SYSTEMS BY GEOGRAPHIC REGION

12.1 Global Navigation Warfare and GNSS Countermeasure / Protection Systems Market Size Forecast by Region

12.1.1 Global Navigation Warfare and GNSS Countermeasure / Protection Systems Forecast by Region (2027-2032)

12.1.2 Global Navigation Warfare and GNSS Countermeasure / Protection Systems Annual Revenue Forecast by Region (2027-2032)

12.2 Americas Forecast by Country (2027-2032)

12.3 APAC Forecast by Region (2027-2032)

12.4 Europe Forecast by Country (2027-2032)

12.5 Middle East & Africa Forecast by Country (2027-2032)

12.6 Global Navigation Warfare and GNSS Countermeasure / Protection Systems Forecast by Type (2027-2032)

12.7 Global Navigation Warfare and GNSS Countermeasure / Protection Systems Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 RTX Corporation

13.1.1 RTX Corporation Company Information

13.1.2 RTX Corporation Navigation Warfare and GNSS Countermeasure / Protection Systems Product Portfolios and Specifications

13.1.3 RTX Corporation Navigation Warfare and GNSS Countermeasure / Protection Systems Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 RTX Corporation Main Business Overview

13.1.5 RTX Corporation Latest Developments

13.2 BAE Systems plc

13.2.1 BAE Systems plc Company Information

13.2.2 BAE Systems plc Navigation Warfare and GNSS Countermeasure / Protection Systems Product Portfolios and Specifications

13.2.3 BAE Systems plc Navigation Warfare and GNSS Countermeasure / Protection Systems Sales, Revenue, Price and Gross Margin (2021-2026)

13.2.4 BAE Systems plc Main Business Overview

13.2.5 BAE Systems plc Latest Developments

13.3 L3Harris Technologies

13.3.1 L3Harris Technologies Company Information

13.3.2 L3Harris Technologies Navigation Warfare and GNSS Countermeasure / Protection Systems Product Portfolios and Specifications

13.3.3 L3Harris Technologies Navigation Warfare and GNSS Countermeasure / Protection Systems Sales, Revenue, Price and Gross Margin (2021-2026)

13.3.4 L3Harris Technologies Main Business Overview

13.3.5 L3Harris Technologies Latest Developments

13.4 Keysight Technologies, Inc.

13.4.1 Keysight Technologies, Inc. Company Information

13.4.2 Keysight Technologies, Inc. Navigation Warfare and GNSS Countermeasure / Protection Systems Product Portfolios and Specifications

13.4.3 Keysight Technologies, Inc. Navigation Warfare and GNSS Countermeasure / Protection Systems Sales, Revenue, Price and Gross Margin (2021-2026)

13.4.4 Keysight Technologies, Inc. Main Business Overview

13.4.5 Keysight Technologies, Inc. Latest Developments

13.5 Rohde & Schwarz GmbH & Co. KG

13.5.1 Rohde & Schwarz GmbH & Co. KG Company Information

13.5.2 Rohde & Schwarz GmbH & Co. KG Navigation Warfare and GNSS Countermeasure / Protection Systems Product Portfolios and Specifications

13.5.3 Rohde & Schwarz GmbH & Co. KG Navigation Warfare and GNSS Countermeasure / Protection Systems Sales, Revenue, Price and Gross Margin (2021-2026)

13.5.4 Rohde & Schwarz GmbH & Co. KG Main Business Overview

13.5.5 Rohde & Schwarz GmbH & Co. KG Latest Developments

13.6 Safran S.A.

13.6.1 Safran S.A. Company Information

13.6.2 Safran S.A. Navigation Warfare and GNSS Countermeasure / Protection Systems Product Portfolios and Specifications

13.6.3 Safran S.A. Navigation Warfare and GNSS Countermeasure / Protection Systems Sales, Revenue, Price and Gross Margin (2021-2026)

13.6.4 Safran S.A. Main Business Overview

13.6.5 Safran S.A. Latest Developments

13.7 VIAVI Solutions Inc.

13.7.1 VIAVI Solutions Inc. Company Information

13.7.2 VIAVI Solutions Inc. Navigation Warfare and GNSS Countermeasure / Protection Systems Product Portfolios and Specifications

13.7.3 VIAVI Solutions Inc. Navigation Warfare and GNSS Countermeasure / Protection Systems Sales, Revenue, Price and Gross Margin (2021-2026)

13.7.4 VIAVI Solutions Inc. Main Business Overview

13.7.5 VIAVI Solutions Inc. Latest Developments

13.8 Iridium Communications Inc.

13.8.1 Iridium Communications Inc. Company Information

13.8.2 Iridium Communications Inc. Navigation Warfare and GNSS Countermeasure / Protection Systems Product Portfolios and Specifications

13.8.3 Iridium Communications Inc. Navigation Warfare and GNSS Countermeasure / Protection Systems Sales, Revenue, Price and Gross Margin (2021-2026)

13.8.4 Iridium Communications Inc. Main Business Overview

13.8.5 Iridium Communications Inc. Latest Developments

13.9 Hexagon AB

13.9.1 Hexagon AB Company Information

13.9.2 Hexagon AB Navigation Warfare and GNSS Countermeasure / Protection Systems Product Portfolios and Specifications

13.9.3 Hexagon AB Navigation Warfare and GNSS Countermeasure / Protection Systems Sales, Revenue, Price and Gross Margin (2021-2026)

13.9.4 Hexagon AB Main Business Overview

13.9.5 Hexagon AB Latest Developments

13.10 Furuno Electric Co., Ltd.

13.10.1 Furuno Electric Co., Ltd. Company Information

13.10.2 Furuno Electric Co., Ltd. Navigation Warfare and GNSS Countermeasure / Protection Systems Product Portfolios and Specifications

13.10.3 Furuno Electric Co., Ltd. Navigation Warfare and GNSS Countermeasure / Protection Systems Sales, Revenue, Price and Gross Margin (2021-2026)

13.10.4 Furuno Electric Co., Ltd. Main Business Overview

13.10.5 Furuno Electric Co., Ltd. Latest Developments

13.11 Septentrio NV

13.11.1 Septentrio NV Company Information

13.11.2 Septentrio NV Navigation Warfare and GNSS Countermeasure / Protection Systems Product Portfolios and Specifications

13.11.3 Septentrio NV Navigation Warfare and GNSS Countermeasure / Protection Systems Sales, Revenue, Price and Gross Margin (2021-2026)

13.11.4 Septentrio NV Main Business Overview

- 13.11.5 Septentrio NV Latest Developments
- 13.12 Qascom S.r.l.
 - 13.12.1 Qascom S.r.l. Company Information
 - 13.12.2 Qascom S.r.l. Navigation Warfare and GNSS Countermeasure / Protection Systems Product Portfolios and Specifications
 - 13.12.3 Qascom S.r.l. Navigation Warfare and GNSS Countermeasure / Protection Systems Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.12.4 Qascom S.r.l. Main Business Overview
 - 13.12.5 Qascom S.r.l. Latest Developments
- 13.13 AccuBeat Ltd.
 - 13.13.1 AccuBeat Ltd. Company Information
 - 13.13.2 AccuBeat Ltd. Navigation Warfare and GNSS Countermeasure / Protection Systems Product Portfolios and Specifications
 - 13.13.3 AccuBeat Ltd. Navigation Warfare and GNSS Countermeasure / Protection Systems Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.13.4 AccuBeat Ltd. Main Business Overview
 - 13.13.5 AccuBeat Ltd. Latest Developments
- 13.14 CAST Navigation, LLC
 - 13.14.1 CAST Navigation, LLC Company Information
 - 13.14.2 CAST Navigation, LLC Navigation Warfare and GNSS Countermeasure / Protection Systems Product Portfolios and Specifications
 - 13.14.3 CAST Navigation, LLC Navigation Warfare and GNSS Countermeasure / Protection Systems Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.14.4 CAST Navigation, LLC Main Business Overview
 - 13.14.5 CAST Navigation, LLC Latest Developments
- 13.15 Syntony GNSS
 - 13.15.1 Syntony GNSS Company Information
 - 13.15.2 Syntony GNSS Navigation Warfare and GNSS Countermeasure / Protection Systems Product Portfolios and Specifications
 - 13.15.3 Syntony GNSS Navigation Warfare and GNSS Countermeasure / Protection Systems Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.15.4 Syntony GNSS Main Business Overview
 - 13.15.5 Syntony GNSS Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Navigation Warfare and GNSS Countermeasure / Protection Systems Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. Navigation Warfare and GNSS Countermeasure / Protection Systems Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Anti-jam Antenna System

Table 4. Major Players of Protected GNSS Receiver / Module

Table 5. Major Players of Other

Table 6. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Sales by Type (2021-2026) & (Units)

Table 7. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Sales Market Share by Type (2021-2026)

Table 8. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue by Type (2021-2026) & (\$ million)

Table 9. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue Market Share by Type (2021-2026)

Table 10. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Sale Price by Type (2021-2026) & (US\$/Unit)

Table 11. Major Players of CRPA / Null Steering

Table 12. Major Players of Beamforming

Table 13. Major Players of Multi-source PNT Fusion

Table 14. Major Players of Other

Table 15. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Sales by Technology Route (2021-2026) & (Units)

Table 16. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Sales Market Share by Technology Route (2021-2026)

Table 17. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue by Technology Route (2021-2026) & (\$ million)

Table 18. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue Market Share by Technology Route (2021-2026)

Table 19. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Sale Price by Technology Route (2021-2026) & (US\$/Unit)

Table 20. Major Players of Jamming Threat

Table 21. Major Players of Spoofing Threat

Table 22. Major Players of GNSS Denial / Outage

Table 23. Major Players of Mixed Threat Environment

Table 24. Major Players of Other

Table 25. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Sales by Threat Type (2021-2026) & (Units)

Table 26. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Sales Market Share by Threat Type (2021-2026)

Table 27. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue by Threat Type (2021-2026) & (\$ million)

Table 28. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue Market Share by Threat Type (2021-2026)

Table 29. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Sale Price by Threat Type (2021-2026) & (US\$/Unit)

Table 30. Major Players of Rack-mounted System

Table 31. Major Players of Portable / Man-portable System

Table 32. Major Players of Other

Table 33. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Sales by Deployment Form (2021-2026) & (Units)

Table 34. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Sales Market Share by Deployment Form (2021-2026)

Table 35. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue by Deployment Form (2021-2026) & (\$ million)

Table 36. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue Market Share by Deployment Form (2021-2026)

Table 37. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Sale Price by Deployment Form (2021-2026) & (US\$/Unit)

Table 38. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Sale by Application (2021-2026) & (Units)

Table 39. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Sale Market Share by Application (2021-2026)

Table 40. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue by Application (2021-2026) & (\$ million)

Table 41. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue Market Share by Application (2021-2026)

Table 42. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Sale Price by Application (2021-2026) & (US\$/Unit)

Table 43. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Sales by Company (2021-2026) & (Units)

Table 44. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Sales Market Share by Company (2021-2026)

Table 45. Global Navigation Warfare and GNSS Countermeasure / Protection Systems

Revenue by Company (2021-2026) & (\$ millions)

Table 46. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue Market Share by Company (2021-2026)

Table 47. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Sale Price by Company (2021-2026) & (US\$/Unit)

Table 48. Key Manufacturers Navigation Warfare and GNSS Countermeasure / Protection Systems Producing Area Distribution and Sales Area

Table 49. Players Navigation Warfare and GNSS Countermeasure / Protection Systems Products Offered

Table 50. Navigation Warfare and GNSS Countermeasure / Protection Systems Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 51. New Products and Potential Entrants

Table 52. Market M&A Activity & Strategy

Table 53. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Sales by Geographic Region (2021-2026) & (Units)

Table 54. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Sales Market Share Geographic Region (2021-2026)

Table 55. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 56. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue Market Share by Geographic Region (2021-2026)

Table 57. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Sales by Country/Region (2021-2026) & (Units)

Table 58. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Sales Market Share by Country/Region (2021-2026)

Table 59. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue by Country/Region (2021-2026) & (\$ millions)

Table 60. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue Market Share by Country/Region (2021-2026)

Table 61. Americas Navigation Warfare and GNSS Countermeasure / Protection Systems Sales by Country (2021-2026) & (Units)

Table 62. Americas Navigation Warfare and GNSS Countermeasure / Protection Systems Sales Market Share by Country (2021-2026)

Table 63. Americas Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue by Country (2021-2026) & (\$ millions)

Table 64. Americas Navigation Warfare and GNSS Countermeasure / Protection Systems Sales by Type (2021-2026) & (Units)

Table 65. Americas Navigation Warfare and GNSS Countermeasure / Protection Systems Sales by Application (2021-2026) & (Units)

Table 66. APAC Navigation Warfare and GNSS Countermeasure / Protection Systems Sales by Region (2021-2026) & (Units)

Table 67. APAC Navigation Warfare and GNSS Countermeasure / Protection Systems Sales Market Share by Region (2021-2026)

Table 68. APAC Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue by Region (2021-2026) & (\$ millions)

Table 69. APAC Navigation Warfare and GNSS Countermeasure / Protection Systems Sales by Type (2021-2026) & (Units)

Table 70. APAC Navigation Warfare and GNSS Countermeasure / Protection Systems Sales by Application (2021-2026) & (Units)

Table 71. Europe Navigation Warfare and GNSS Countermeasure / Protection Systems Sales by Country (2021-2026) & (Units)

Table 72. Europe Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue by Country (2021-2026) & (\$ millions)

Table 73. Europe Navigation Warfare and GNSS Countermeasure / Protection Systems Sales by Type (2021-2026) & (Units)

Table 74. Europe Navigation Warfare and GNSS Countermeasure / Protection Systems Sales by Application (2021-2026) & (Units)

Table 75. Middle East & Africa Navigation Warfare and GNSS Countermeasure / Protection Systems Sales by Country (2021-2026) & (Units)

Table 76. Middle East & Africa Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue Market Share by Country (2021-2026)

Table 77. Middle East & Africa Navigation Warfare and GNSS Countermeasure / Protection Systems Sales by Type (2021-2026) & (Units)

Table 78. Middle East & Africa Navigation Warfare and GNSS Countermeasure / Protection Systems Sales by Application (2021-2026) & (Units)

Table 79. Key Market Drivers & Growth Opportunities of Navigation Warfare and GNSS Countermeasure / Protection Systems

Table 80. Key Market Challenges & Risks of Navigation Warfare and GNSS Countermeasure / Protection Systems

Table 81. Key Industry Trends of Navigation Warfare and GNSS Countermeasure / Protection Systems

Table 82. Navigation Warfare and GNSS Countermeasure / Protection Systems Raw Material

Table 83. Key Suppliers of Raw Materials

Table 84. Navigation Warfare and GNSS Countermeasure / Protection Systems Distributors List

Table 85. Navigation Warfare and GNSS Countermeasure / Protection Systems Customer List

Table 86. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Sales Forecast by Region (2027-2032) & (Units)
Table 87. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue Forecast by Region (2027-2032) & (\$ millions)
Table 88. Americas Navigation Warfare and GNSS Countermeasure / Protection Systems Sales Forecast by Country (2027-2032) & (Units)
Table 89. Americas Navigation Warfare and GNSS Countermeasure / Protection Systems Annual Revenue Forecast by Country (2027-2032) & (\$ millions)
Table 90. APAC Navigation Warfare and GNSS Countermeasure / Protection Systems Sales Forecast by Region (2027-2032) & (Units)
Table 91. APAC Navigation Warfare and GNSS Countermeasure / Protection Systems Annual Revenue Forecast by Region (2027-2032) & (\$ millions)
Table 92. Europe Navigation Warfare and GNSS Countermeasure / Protection Systems Sales Forecast by Country (2027-2032) & (Units)
Table 93. Europe Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue Forecast by Country (2027-2032) & (\$ millions)
Table 94. Middle East & Africa Navigation Warfare and GNSS Countermeasure / Protection Systems Sales Forecast by Country (2027-2032) & (Units)
Table 95. Middle East & Africa Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue Forecast by Country (2027-2032) & (\$ millions)
Table 96. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Sales Forecast by Type (2027-2032) & (Units)
Table 97. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue Forecast by Type (2027-2032) & (\$ millions)
Table 98. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Sales Forecast by Application (2027-2032) & (Units)
Table 99. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue Forecast by Application (2027-2032) & (\$ millions)
Table 100. RTX Corporation Basic Information, Navigation Warfare and GNSS Countermeasure / Protection Systems Manufacturing Base, Sales Area and Its Competitors
Table 101. RTX Corporation Navigation Warfare and GNSS Countermeasure / Protection Systems Product Portfolios and Specifications
Table 102. RTX Corporation Navigation Warfare and GNSS Countermeasure / Protection Systems Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)
Table 103. RTX Corporation Main Business
Table 104. RTX Corporation Latest Developments
Table 105. BAE Systems plc Basic Information, Navigation Warfare and GNSS

Countermeasure / Protection Systems Manufacturing Base, Sales Area and Its Competitors

Table 106. BAE Systems plc Navigation Warfare and GNSS Countermeasure / Protection Systems Product Portfolios and Specifications

Table 107. BAE Systems plc Navigation Warfare and GNSS Countermeasure / Protection Systems Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 108. BAE Systems plc Main Business

Table 109. BAE Systems plc Latest Developments

Table 110. L3Harris Technologies Basic Information, Navigation Warfare and GNSS Countermeasure / Protection Systems Manufacturing Base, Sales Area and Its Competitors

Table 111. L3Harris Technologies Navigation Warfare and GNSS Countermeasure / Protection Systems Product Portfolios and Specifications

Table 112. L3Harris Technologies Navigation Warfare and GNSS Countermeasure / Protection Systems Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 113. L3Harris Technologies Main Business

Table 114. L3Harris Technologies Latest Developments

Table 115. Keysight Technologies, Inc. Basic Information, Navigation Warfare and GNSS Countermeasure / Protection Systems Manufacturing Base, Sales Area and Its Competitors

Table 116. Keysight Technologies, Inc. Navigation Warfare and GNSS Countermeasure / Protection Systems Product Portfolios and Specifications

Table 117. Keysight Technologies, Inc. Navigation Warfare and GNSS Countermeasure / Protection Systems Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 118. Keysight Technologies, Inc. Main Business

Table 119. Keysight Technologies, Inc. Latest Developments

Table 120. Rohde & Schwarz GmbH & Co. KG Basic Information, Navigation Warfare and GNSS Countermeasure / Protection Systems Manufacturing Base, Sales Area and Its Competitors

Table 121. Rohde & Schwarz GmbH & Co. KG Navigation Warfare and GNSS Countermeasure / Protection Systems Product Portfolios and Specifications

Table 122. Rohde & Schwarz GmbH & Co. KG Navigation Warfare and GNSS Countermeasure / Protection Systems Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 123. Rohde & Schwarz GmbH & Co. KG Main Business

Table 124. Rohde & Schwarz GmbH & Co. KG Latest Developments

Table 125. Safran S.A. Basic Information, Navigation Warfare and GNSS Countermeasure / Protection Systems Manufacturing Base, Sales Area and Its Competitors

Table 126. Safran S.A. Navigation Warfare and GNSS Countermeasure / Protection Systems Product Portfolios and Specifications

Table 127. Safran S.A. Navigation Warfare and GNSS Countermeasure / Protection Systems Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 128. Safran S.A. Main Business

Table 129. Safran S.A. Latest Developments

Table 130. VIAVI Solutions Inc. Basic Information, Navigation Warfare and GNSS Countermeasure / Protection Systems Manufacturing Base, Sales Area and Its Competitors

Table 131. VIAVI Solutions Inc. Navigation Warfare and GNSS Countermeasure / Protection Systems Product Portfolios and Specifications

Table 132. VIAVI Solutions Inc. Navigation Warfare and GNSS Countermeasure / Protection Systems Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 133. VIAVI Solutions Inc. Main Business

Table 134. VIAVI Solutions Inc. Latest Developments

Table 135. Iridium Communications Inc. Basic Information, Navigation Warfare and GNSS Countermeasure / Protection Systems Manufacturing Base, Sales Area and Its Competitors

Table 136. Iridium Communications Inc. Navigation Warfare and GNSS Countermeasure / Protection Systems Product Portfolios and Specifications

Table 137. Iridium Communications Inc. Navigation Warfare and GNSS Countermeasure / Protection Systems Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 138. Iridium Communications Inc. Main Business

Table 139. Iridium Communications Inc. Latest Developments

Table 140. Hexagon AB Basic Information, Navigation Warfare and GNSS Countermeasure / Protection Systems Manufacturing Base, Sales Area and Its Competitors

Table 141. Hexagon AB Navigation Warfare and GNSS Countermeasure / Protection Systems Product Portfolios and Specifications

Table 142. Hexagon AB Navigation Warfare and GNSS Countermeasure / Protection Systems Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 143. Hexagon AB Main Business

Table 144. Hexagon AB Latest Developments

Table 145. Furuno Electric Co., Ltd. Basic Information, Navigation Warfare and GNSS Countermeasure / Protection Systems Manufacturing Base, Sales Area and Its Competitors

Table 146. Furuno Electric Co., Ltd. Navigation Warfare and GNSS Countermeasure / Protection Systems Product Portfolios and Specifications

Table 147. Furuno Electric Co., Ltd. Navigation Warfare and GNSS Countermeasure / Protection Systems Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 148. Furuno Electric Co., Ltd. Main Business

Table 149. Furuno Electric Co., Ltd. Latest Developments

Table 150. Septentrio NV Basic Information, Navigation Warfare and GNSS Countermeasure / Protection Systems Manufacturing Base, Sales Area and Its Competitors

Table 151. Septentrio NV Navigation Warfare and GNSS Countermeasure / Protection Systems Product Portfolios and Specifications

Table 152. Septentrio NV Navigation Warfare and GNSS Countermeasure / Protection Systems Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 153. Septentrio NV Main Business

Table 154. Septentrio NV Latest Developments

Table 155. Qascom S.r.l. Basic Information, Navigation Warfare and GNSS Countermeasure / Protection Systems Manufacturing Base, Sales Area and Its Competitors

Table 156. Qascom S.r.l. Navigation Warfare and GNSS Countermeasure / Protection Systems Product Portfolios and Specifications

Table 157. Qascom S.r.l. Navigation Warfare and GNSS Countermeasure / Protection Systems Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 158. Qascom S.r.l. Main Business

Table 159. Qascom S.r.l. Latest Developments

Table 160. AccuBeat Ltd. Basic Information, Navigation Warfare and GNSS Countermeasure / Protection Systems Manufacturing Base, Sales Area and Its Competitors

Table 161. AccuBeat Ltd. Navigation Warfare and GNSS Countermeasure / Protection Systems Product Portfolios and Specifications

Table 162. AccuBeat Ltd. Navigation Warfare and GNSS Countermeasure / Protection Systems Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 163. AccuBeat Ltd. Main Business

Table 164. AccuBeat Ltd. Latest Developments

Table 165. CAST Navigation, LLC Basic Information, Navigation Warfare and GNSS Countermeasure / Protection Systems Manufacturing Base, Sales Area and Its Competitors

Table 166. CAST Navigation, LLC Navigation Warfare and GNSS Countermeasure / Protection Systems Product Portfolios and Specifications

Table 167. CAST Navigation, LLC Navigation Warfare and GNSS Countermeasure / Protection Systems Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 168. CAST Navigation, LLC Main Business

Table 169. CAST Navigation, LLC Latest Developments

Table 170. Syntony GNSS Basic Information, Navigation Warfare and GNSS Countermeasure / Protection Systems Manufacturing Base, Sales Area and Its Competitors

Table 171. Syntony GNSS Navigation Warfare and GNSS Countermeasure / Protection Systems Product Portfolios and Specifications

Table 172. Syntony GNSS Navigation Warfare and GNSS Countermeasure / Protection Systems Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 173. Syntony GNSS Main Business

Table 174. Syntony GNSS Latest Developments

List Of Figures

LIST OF FIGURES

Figure 1. Picture of Navigation Warfare and GNSS Countermeasure / Protection Systems

Figure 2. Navigation Warfare and GNSS Countermeasure / Protection Systems Report Years Considered

Figure 3. Research Objectives

Figure 4. Research Methodology

Figure 5. Research Process and Data Source

Figure 6. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Sales Growth Rate 2021-2032 (Units)

Figure 7. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue Growth Rate 2021-2032 (\$ millions)

Figure 8. Navigation Warfare and GNSS Countermeasure / Protection Systems Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Figure 9. Navigation Warfare and GNSS Countermeasure / Protection Systems Sales Market Share by Country/Region (2025)

Figure 10. Navigation Warfare and GNSS Countermeasure / Protection Systems Sales Market Share by Country/Region (2021, 2025 & 2032)

Figure 11. Product Picture of Anti-jam Antenna System

Figure 12. Product Picture of Protected GNSS Receiver / Module

Figure 13. Product Picture of Other

Figure 14. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Sales Market Share by Type in 2026

Figure 15. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue Market Share by Type (2021-2026)

Figure 16. Product Picture of CRPA / Null Steering

Figure 17. Product Picture of Beamforming

Figure 18. Product Picture of Multi-source PNT Fusion

Figure 19. Product Picture of Other

Figure 20. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Sales Market Share by Technology Route in 2026

Figure 21. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue Market Share by Technology Route (2021-2026)

Figure 22. Product Picture of Jamming Threat

Figure 23. Product Picture of Spoofing Threat

Figure 24. Product Picture of GNSS Denial / Outage

Figure 25. Product Picture of Mixed Threat Environment

Figure 26. Product Picture of Other

Figure 27. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Sales Market Share by Threat Type in 2026

Figure 28. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue Market Share by Threat Type (2021-2026)

Figure 29. Product Picture of Rack-mounted System

Figure 30. Product Picture of Portable / Man-portable System

Figure 31. Product Picture of Other

Figure 32. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Sales Market Share by Deployment Form in 2026

Figure 33. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue Market Share by Deployment Form (2021-2026)

Figure 34. Navigation Warfare and GNSS Countermeasure / Protection Systems Consumed in Platform Navigation Protection

Figure 35. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Market: Platform Navigation Protection (2021-2026) & (Units)

Figure 36. Navigation Warfare and GNSS Countermeasure / Protection Systems Consumed in Precision Timing Protection

Figure 37. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Market: Precision Timing Protection (2021-2026) & (Units)

Figure 38. Navigation Warfare and GNSS Countermeasure / Protection Systems Consumed in Interference Monitoring & Alerting

Figure 39. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Market: Interference Monitoring & Alerting (2021-2026) & (Units)

Figure 40. Navigation Warfare and GNSS Countermeasure / Protection Systems Consumed in NAVWAR Training & Evaluation

Figure 41. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Market: NAVWAR Training & Evaluation (2021-2026) & (Units)

Figure 42. Navigation Warfare and GNSS Countermeasure / Protection Systems Consumed in PNT Resilience Backup

Figure 43. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Market: PNT Resilience Backup (2021-2026) & (Units)

Figure 44. Navigation Warfare and GNSS Countermeasure / Protection Systems Consumed in Other

Figure 45. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Market: Other (2021-2026) & (Units)

Figure 46. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Sale Market Share by Application (2025)

Figure 47. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue Market Share by Application in 2025

Figure 48. Navigation Warfare and GNSS Countermeasure / Protection Systems Sales by Company in 2025 (Units)

Figure 49. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Sales Market Share by Company in 2025

Figure 50. Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue by Company in 2025 (\$ millions)

Figure 51. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue Market Share by Company in 2025

Figure 52. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Sales Market Share by Geographic Region (2021-2026)

Figure 53. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue Market Share by Geographic Region in 2025

Figure 54. Americas Navigation Warfare and GNSS Countermeasure / Protection Systems Sales 2021-2026 (Units)

Figure 55. Americas Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue 2021-2026 (\$ millions)

Figure 56. APAC Navigation Warfare and GNSS Countermeasure / Protection Systems Sales 2021-2026 (Units)

Figure 57. APAC Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue 2021-2026 (\$ millions)

Figure 58. Europe Navigation Warfare and GNSS Countermeasure / Protection Systems Sales 2021-2026 (Units)

Figure 59. Europe Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue 2021-2026 (\$ millions)

Figure 60. Middle East & Africa Navigation Warfare and GNSS Countermeasure / Protection Systems Sales 2021-2026 (Units)

Figure 61. Middle East & Africa Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue 2021-2026 (\$ millions)

Figure 62. Americas Navigation Warfare and GNSS Countermeasure / Protection Systems Sales Market Share by Country in 2025

Figure 63. Americas Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue Market Share by Country (2021-2026)

Figure 64. Americas Navigation Warfare and GNSS Countermeasure / Protection Systems Sales Market Share by Type (2021-2026)

Figure 65. Americas Navigation Warfare and GNSS Countermeasure / Protection Systems Sales Market Share by Application (2021-2026)

Figure 66. United States Navigation Warfare and GNSS Countermeasure / Protection

Systems Revenue Growth 2021-2026 (\$ millions)

Figure 67. Canada Navigation Warfare and GNSS Countermeasure / Protection

Systems Revenue Growth 2021-2026 (\$ millions)

Figure 68. Mexico Navigation Warfare and GNSS Countermeasure / Protection

Systems Revenue Growth 2021-2026 (\$ millions)

Figure 69. Brazil Navigation Warfare and GNSS Countermeasure / Protection Systems
Revenue Growth 2021-2026 (\$ millions)

Figure 70. APAC Navigation Warfare and GNSS Countermeasure / Protection Systems
Sales Market Share by Region in 2025

Figure 71. APAC Navigation Warfare and GNSS Countermeasure / Protection Systems
Revenue Market Share by Region (2021-2026)

Figure 72. APAC Navigation Warfare and GNSS Countermeasure / Protection Systems
Sales Market Share by Type (2021-2026)

Figure 73. APAC Navigation Warfare and GNSS Countermeasure / Protection Systems
Sales Market Share by Application (2021-2026)

Figure 74. China Navigation Warfare and GNSS Countermeasure / Protection Systems
Revenue Growth 2021-2026 (\$ millions)

Figure 75. Japan Navigation Warfare and GNSS Countermeasure / Protection Systems
Revenue Growth 2021-2026 (\$ millions)

Figure 76. South Korea Navigation Warfare and GNSS Countermeasure / Protection
Systems Revenue Growth 2021-2026 (\$ millions)

Figure 77. Southeast Asia Navigation Warfare and GNSS Countermeasure / Protection
Systems Revenue Growth 2021-2026 (\$ millions)

Figure 78. India Navigation Warfare and GNSS Countermeasure / Protection Systems
Revenue Growth 2021-2026 (\$ millions)

Figure 79. Australia Navigation Warfare and GNSS Countermeasure / Protection
Systems Revenue Growth 2021-2026 (\$ millions)

Figure 80. China Taiwan Navigation Warfare and GNSS Countermeasure / Protection
Systems Revenue Growth 2021-2026 (\$ millions)

Figure 81. Europe Navigation Warfare and GNSS Countermeasure / Protection
Systems Sales Market Share by Country in 2025

Figure 82. Europe Navigation Warfare and GNSS Countermeasure / Protection
Systems Revenue Market Share by Country (2021-2026)

Figure 83. Europe Navigation Warfare and GNSS Countermeasure / Protection
Systems Sales Market Share by Type (2021-2026)

Figure 84. Europe Navigation Warfare and GNSS Countermeasure / Protection
Systems Sales Market Share by Application (2021-2026)

Figure 85. Germany Navigation Warfare and GNSS Countermeasure / Protection
Systems Revenue Growth 2021-2026 (\$ millions)

Figure 86. France Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue Growth 2021-2026 (\$ millions)

Figure 87. UK Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue Growth 2021-2026 (\$ millions)

Figure 88. Italy Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue Growth 2021-2026 (\$ millions)

Figure 89. Russia Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue Growth 2021-2026 (\$ millions)

Figure 90. Middle East & Africa Navigation Warfare and GNSS Countermeasure / Protection Systems Sales Market Share by Country (2021-2026)

Figure 91. Middle East & Africa Navigation Warfare and GNSS Countermeasure / Protection Systems Sales Market Share by Type (2021-2026)

Figure 92. Middle East & Africa Navigation Warfare and GNSS Countermeasure / Protection Systems Sales Market Share by Application (2021-2026)

Figure 93. Egypt Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue Growth 2021-2026 (\$ millions)

Figure 94. South Africa Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue Growth 2021-2026 (\$ millions)

Figure 95. Israel Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue Growth 2021-2026 (\$ millions)

Figure 96. Turkey Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue Growth 2021-2026 (\$ millions)

Figure 97. GCC Countries Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue Growth 2021-2026 (\$ millions)

Figure 98. Manufacturing Cost Structure Analysis of Navigation Warfare and GNSS Countermeasure / Protection Systems in 2026

Figure 99. Manufacturing Process Analysis of Navigation Warfare and GNSS Countermeasure / Protection Systems

Figure 100. Industry Chain Structure of Navigation Warfare and GNSS Countermeasure / Protection Systems

Figure 101. Channels of Distribution

Figure 102. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Sales Market Forecast by Region (2027-2032)

Figure 103. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue Market Share Forecast by Region (2027-2032)

Figure 104. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Sales Market Share Forecast by Type (2027-2032)

Figure 105. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue Market Share Forecast by Type (2027-2032)

Figure 106. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Sales Market Share Forecast by Application (2027-2032)

Figure 107. Global Navigation Warfare and GNSS Countermeasure / Protection Systems Revenue Market Share Forecast by Application (2027-2032)

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