

Asia Pacific Geographic Information System Market Report (2021-2031) by Scope, Segmentation, Dynamics, and Competitive Analysis

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Abstracts

The Asia Pacific geographic information system (GIS) market is projected to grow significantly, reaching approximately US\$ 5,491.21 million by 2031, up from US\$ 2,614.08 million in 2023, with an estimated compound annual growth rate (CAGR) of 9.7% from 2023 to 2031.

Executive Summary and Market Analysis

The Asia Pacific region boasts a robust automotive industry, particularly in countries like India, China, and South Korea, which are key players in automotive manufacturing. This region, being the most populous globally, features a wide array of automotive manufacturers. The connected vehicle sector is rapidly evolving, transforming interactions between people and their vehicles as well as the broader transportation ecosystem. Major automotive companies, including Toyota, Hyundai, and BYD, are heavily investing in advanced connectivity features. For example, Toyota has invested US\$ 600 million in DiDi Global, a mobility technology firm in China, to enhance vehicle tracking and fuel efficiency through telematics solutions. Both BYD and Toyota are introducing fully connected vehicles equipped with advanced features such as infotainment systems and GPS tracking.

China and India are actively promoting electric mobility, offering incentives for electric vehicle (EV) adoption and developing charging infrastructure. The region's strong digital infrastructure, including the rollout of 5G networks, facilitates high-speed, low-latency connectivity, enabling vehicles to access real-time data, receive updates, and communicate with other vehicles and infrastructure seamlessly.

China is the largest market in the Asia Pacific for GIS, driven by its well-established automotive sector. The increase in automotive sales is boosting the demand for GIS technologies. Additionally, the rising adoption of advanced technologies and the growing need for unpowered trailers and caravans are contributing to the market's expansion.

Market Segmentation Analysis

The Asia Pacific GIS market can be segmented by component, function, and end user.

Component: The market is divided into hardware, software, and services, with software holding the largest market share in 2023. The hardware segment includes GIS collectors, imaging sensors, LIDAR, total stations, and GNSS/GPS antennas. The software segment encompasses desktop GIS, server GIS, developer GIS, mobile GIS, and remote sensing software.

Function: The market is categorized into mapping, surveying, telematics and navigation, and location-based services, with mapping being the largest segment in 2023.

End User: The end-user segments include agriculture, oil and gas, construction, mining, transportation, energy and power, among others, with transportation leading the market share in 2023.

Market Outlook

Key players are increasingly developing AI, generative AI (Gen AI), and augmented reality-based GIS solutions for enhanced spatial data visualization and analysis. For instance, in January 2024, Deloitte launched a geospatial platform integrated with AI for scenario planning and monitoring, utilizing Google Earth and Vertex AI technologies to help clients leverage geospatial data for climate change mitigation.

In 2023, many IT companies began integrating Gen AI into their operations to enhance productivity and efficiency. Gen AI-based GIS offers numerous advantages, such as location intelligence, asset mapping, identifying lucrative real estate opportunities, and

targeting specific demographics. The emergence of AI and augmented reality in GIS is expected to drive new trends in the market.

Country Insights

The Asia Pacific GIS market includes countries like China, Japan, India, South Korea, Australia, and others, with China holding the largest market share in 2023. China is a leading automotive manufacturing hub, home to major companies like SAIC Motor and Dongfeng Motor Corporation, as well as luxury brands such as Mercedes-Benz and BMW, which incorporate advanced GIS solutions for enhanced connectivity.

China's automotive market is evolving into a "2.0 era," presenting growth opportunities for manufacturers. Companies like BYD and NIO are advancing in the connected vehicle space, supported by urbanization and smart city initiatives that promote vehicle-to-infrastructure (V2I) communication, thereby improving traffic management and safety. The extensive 5G network in China enhances vehicle connectivity, enabling features like over-the-air updates and real-time navigation, which are expected to drive GIS market growth.

The construction sector in China is also experiencing rapid growth, with significant government investment in infrastructure projects. The 2024 budget includes US\$ 4 trillion for various initiatives, including US\$ 173 billion for transport infrastructure, which is anticipated to create substantial demand for GIS technologies.

Company Profiles

Key players in the Asia Pacific GIS market include Autodesk Inc, Topcon Corp, Caliper Corp, SuperMap Software Co Ltd, and others. These companies are pursuing strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence and offer innovative solutions to consumers.

Contents

1. INTRODUCTION

- 1.1 Report Guidance
- 1.2 Market Segmentation

2. EXECUTIVE SUMMARY

- 2.1 Key Insights
- 2.2 Market Attractiveness

3. RESEARCH METHODOLOGY

- 3.1 Secondary Research
- 3.2 Primary Research
 - 3.2.1 Hypothesis formulation:
 - 3.2.2 Macroeconomic factor analysis:
 - 3.2.3 Developing base number:
 - 3.2.4 Data Triangulation:
 - 3.2.5 Country-level data:

4. ASIA PACIFIC GEOGRAPHIC INFORMATION SYSTEM (GIS) MARKET LANDSCAPE

- 4.1 Overview
- 4.2 Ecosystem Analysis
 - 4.2.1 Component Suppliers
 - 4.2.2 Software System Integrators
 - 4.2.3 Major GIS Vendors
 - 4.2.4 End-User Industries

5. ASIA PACIFIC GEOGRAPHIC INFORMATION SYSTEM (GIS) MARKET - KEY MARKET DYNAMICS

- 5.1 Market Drivers
 - 5.1.1 Rapid Development of Smart City Projects
 - 5.1.2 High Demand for Real-Time Location-Based Services in Logistics and Transportation and Infrastructure Sectors

5.2 Market Restraints

5.2.1 High Cost Associated with GIS Solutions

5.3 Market Opportunities

5.3.1 Rising Adoption of GIS Solutions in Agriculture Sector

5.4 Future Trends

5.4.1 Launch of AI, Gen AI, and Augmented Reality-Based GIS Solutions

5.5 Impact of Drivers and Restraints:

6. GEOGRAPHIC INFORMATION SYSTEM (GIS) MARKET - ASIA PACIFIC ANALYSIS

6.1 Asia Pacific Geographic Information System (GIS) Market Revenue (US\$ Million), 2021-2031

6.2 Asia Pacific Geographic Information System (GIS) Market Forecast Analysis

7. ASIA PACIFIC GEOGRAPHIC INFORMATION SYSTEM (GIS) MARKET ANALYSIS - BY COMPONENT

7.1 Hardware

7.1.1 Overview

7.1.2 Hardware: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021-2031 (US\$ Million)

7.2 Software

7.2.1 Overview

7.2.2 Software: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021-2031 (US\$ Million)

7.3 Services

7.3.1 Overview

7.3.2 Services: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021-2031 (US\$ Million)

8. ASIA PACIFIC GEOGRAPHIC INFORMATION SYSTEM (GIS) MARKET ANALYSIS - BY FUNCTION

8.1 Mapping

8.1.1 Overview

8.1.2 Mapping: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021-2031 (US\$ Million)

8.2 Surveying

8.2.1 Overview

8.2.2 Surveying: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021-2031 (US\$ Million)

8.3 Telematics and Navigation

8.3.1 Overview

8.3.2 Telematics and Navigation: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021-2031 (US\$ Million)

8.4 Location-based Services

8.4.1 Overview

8.4.2 Location-based Services: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021-2031 (US\$ Million)

9. ASIA PACIFIC GEOGRAPHIC INFORMATION SYSTEM (GIS) MARKET ANALYSIS - BY END USER

9.1 Agriculture

9.1.1 Overview

9.1.2 Agriculture: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021-2031 (US\$ Million)

9.2 Oil and Gas

9.2.1 Overview

9.2.2 Oil and Gas: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021-2031 (US\$ Million)

9.3 Construction

9.3.1 Overview

9.3.2 Construction: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021-2031 (US\$ Million)

9.4 Mining

9.4.1 Overview

9.4.2 Mining: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021-2031 (US\$ Million)

9.5 Transportation

9.5.1 Overview

9.5.2 Transportation: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021-2031 (US\$ Million)

9.6 Energy and Power

9.6.1 Overview

9.6.2 Energy and Power: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021-2031 (US\$ Million)

9.7 Others

9.7.1 Overview

9.7.2 Others: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021-2031 (US\$ Million)

10. ASIA PACIFIC GEOGRAPHIC INFORMATION SYSTEM (GIS) MARKET - COUNTRY ANALYSIS

10.1 Asia Pacific

10.1.1 Asia Pacific Geographic Information System (GIS) Market Overview

10.1.2 Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast Analysis - by Country

10.1.2.1 Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast Analysis - by Country

10.1.2.2 China: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021-2031 (US\$ Million)

10.1.2.2.1 China: Asia Pacific Geographic Information System (GIS) Market Share - by Component

10.1.2.2.2 China: Asia Pacific Geographic Information System (GIS) Market Share - by Hardware

10.1.2.2.3 China: Asia Pacific Geographic Information System (GIS) Market Share - by Software

10.1.2.2.4 China: Asia Pacific Geographic Information System (GIS) Market Share - by Function

10.1.2.2.5 China: Asia Pacific Geographic Information System (GIS) Market Share - by End User

10.1.2.3 Japan: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021-2031 (US\$ Million)

10.1.2.3.1 Japan: Asia Pacific Geographic Information System (GIS) Market Share - by Component

10.1.2.3.2 Japan: Asia Pacific Geographic Information System (GIS) Market Share - by Hardware

10.1.2.3.3 Japan: Asia Pacific Geographic Information System (GIS) Market Share - by Software

10.1.2.3.4 Japan: Asia Pacific Geographic Information System (GIS) Market Share - by Function

10.1.2.3.5 Japan: Asia Pacific Geographic Information System (GIS) Market Share - by End User

10.1.2.4 India: Asia Pacific Geographic Information System (GIS) Market - Revenue

and Forecast, 2021-2031 (US\$ Million)

10.1.2.4.1 India: Asia Pacific Geographic Information System (GIS) Market Share - by Component

10.1.2.4.2 India: Asia Pacific Geographic Information System (GIS) Market Share - by Hardware

10.1.2.4.3 India: Asia Pacific Geographic Information System (GIS) Market Share - by Software

10.1.2.4.4 India: Asia Pacific Geographic Information System (GIS) Market Share - by Function

10.1.2.4.5 India: Asia Pacific Geographic Information System (GIS) Market Share - by End User

10.1.2.5 South Korea: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021-2031 (US\$ Million)

10.1.2.5.1 South Korea: Asia Pacific Geographic Information System (GIS) Market Share - by Component

10.1.2.5.2 South Korea: Asia Pacific Geographic Information System (GIS) Market Share - by Hardware

10.1.2.5.3 South Korea: Asia Pacific Geographic Information System (GIS) Market Share - by Software

10.1.2.5.4 South Korea: Asia Pacific Geographic Information System (GIS) Market Share - by Function

10.1.2.5.5 South Korea: Asia Pacific Geographic Information System (GIS) Market Share - by End User

10.1.2.6 Australia: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021-2031 (US\$ Million)

10.1.2.6.1 Australia: Asia Pacific Geographic Information System (GIS) Market Share - by Component

10.1.2.6.2 Australia: Asia Pacific Geographic Information System (GIS) Market Share - by Hardware

10.1.2.6.3 Australia: Asia Pacific Geographic Information System (GIS) Market Share - by Software

10.1.2.6.4 Australia: Asia Pacific Geographic Information System (GIS) Market Share - by Function

10.1.2.6.5 Australia: Asia Pacific Geographic Information System (GIS) Market Share - by End User

10.1.2.7 Rest of APAC: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021-2031 (US\$ Million)

10.1.2.7.1 Rest of APAC: Asia Pacific Geographic Information System (GIS) Market Share - by Component

10.1.2.7.2 Rest of APAC: Asia Pacific Geographic Information System (GIS) Market Share - by Hardware

10.1.2.7.3 Rest of APAC: Asia Pacific Geographic Information System (GIS) Market Share - by Software

10.1.2.7.4 Rest of APAC: Asia Pacific Geographic Information System (GIS) Market Share - by Function

10.1.2.7.5 Rest of APAC: Asia Pacific Geographic Information System (GIS) Market Share - by End User

11. COMPETITIVE LANDSCAPE

11.1 Heat Map Analysis by Key Players

11.2 Company Positioning and Concentration

12. INDUSTRY LANDSCAPE

12.1 Overview

12.2 Market Initiative

12.3 Partnerships and Collaborations

12.4 Other Developments

13. COMPANY PROFILES

13.1 Autodesk Inc

13.1.1 Key Facts

13.1.2 Business Description

13.1.3 Products and Services

13.1.4 Financial Overview

13.1.5 SWOT Analysis

13.1.6 Key Developments

13.2 Topcon Corp

13.2.1 Key Facts

13.2.2 Business Description

13.2.3 Products and Services

13.2.4 Financial Overview

13.2.5 SWOT Analysis

13.2.6 Key Developments

13.3 Caliper Corp

13.3.1 Key Facts

- 13.3.2 Business Description
- 13.3.3 Products and Services
- 13.3.4 Financial Overview
- 13.3.5 SWOT Analysis
- 13.3.6 Key Developments
- 13.4 SuperMap Software Co Ltd
 - 13.4.1 Key Facts
 - 13.4.2 Business Description
 - 13.4.3 Products and Services
 - 13.4.4 Financial Overview
 - 13.4.5 SWOT Analysis
 - 13.4.6 Key Developments
- 13.5 Hexagon AB
 - 13.5.1 Key Facts
 - 13.5.2 Business Description
 - 13.5.3 Products and Services
 - 13.5.4 Financial Overview
 - 13.5.5 SWOT Analysis
 - 13.5.6 Key Developments
- 13.6 Hi-Target
 - 13.6.1 Key Facts
 - 13.6.2 Business Description
 - 13.6.3 Products and Services
 - 13.6.4 Financial Overview
 - 13.6.5 SWOT Analysis
 - 13.6.6 Key Developments
- 13.7 Precisely
 - 13.7.1 Key Facts
 - 13.7.2 Business Description
 - 13.7.3 Products and Services
 - 13.7.4 Financial Overview
 - 13.7.5 SWOT Analysis
 - 13.7.6 Key Developments
- 13.8 Maxar Technologies Inc
 - 13.8.1 Key Facts
 - 13.8.2 Business Description
 - 13.8.3 Products and Services
 - 13.8.4 Financial Overview
 - 13.8.5 SWOT Analysis

- 13.8.6 Key Developments
- 13.9 Trimble Inc
 - 13.9.1 Key Facts
 - 13.9.2 Business Description
 - 13.9.3 Products and Services
 - 13.9.4 Financial Overview
 - 13.9.5 SWOT Analysis
 - 13.9.6 Key Developments
- 13.10 AmigoCloud Inc
 - 13.10.1 Key Facts
 - 13.10.2 Business Description
 - 13.10.3 Products and Services
 - 13.10.4 Financial Overview
 - 13.10.5 SWOT Analysis
 - 13.10.6 Key Developments
- 13.11 Bentley Systems Inc
 - 13.11.1 Key Facts
 - 13.11.2 Business Description
 - 13.11.3 Products and Services
 - 13.11.4 Financial Overview
 - 13.11.5 SWOT Analysis
 - 13.11.6 Key Developments
- 13.12 Cadcorp Limited
 - 13.12.1 Key Facts
 - 13.12.2 Business Description
 - 13.12.3 Products and Services
 - 13.12.4 Financial Overview
 - 13.12.5 SWOT Analysis
 - 13.12.6 Key Developments
- 13.13 Spatialworks Sdn Bhd.
 - 13.13.1 Key Facts
 - 13.13.2 Business Description
 - 13.13.3 Products and Services
 - 13.13.4 Financial Overview
 - 13.13.5 SWOT Analysis
 - 13.13.6 Key Developments
- 13.14 Environmental Systems Research Institute, Inc.
 - 13.14.1 Key Facts
 - 13.14.2 Business Description

- 13.14.3 Products and Services
- 13.14.4 Financial Overview
- 13.14.5 SWOT Analysis
- 13.14.6 Key Developments
- 13.15 Blue Marble Geographics
 - 13.15.1 Key Facts
 - 13.15.2 Business Description
 - 13.15.3 Products and Services
 - 13.15.4 Financial Overview
 - 13.15.5 SWOT Analysis
 - 13.15.6 Key Developments
- 13.16 TomTom International B.V.
 - 13.16.1 Key Facts
 - 13.16.2 Business Description
 - 13.16.3 Products and Services
 - 13.16.4 Financial Overview
 - 13.16.5 SWOT Analysis
 - 13.16.6 Key Developments
- 13.17 FARO Technologies Inc
 - 13.17.1 Key Facts
 - 13.17.2 Business Description
 - 13.17.3 Products and Services
 - 13.17.4 Financial Overview
 - 13.17.5 SWOT Analysis
 - 13.17.6 Key Developments
- 13.18 L3Harris Technologies Inc
 - 13.18.1 Key Facts
 - 13.18.2 Business Description
 - 13.18.3 Products and Services
 - 13.18.4 Financial Overview
 - 13.18.5 SWOT Analysis
 - 13.18.6 Key Developments
- 13.19 Basarsoft Bilgi Teknolojileri A.S.
 - 13.19.1 Key Facts
 - 13.19.2 Business Description
 - 13.19.3 Products and Services
 - 13.19.4 Financial Overview
 - 13.19.5 SWOT Analysis
 - 13.19.6 Key Developments

13.20 Carto

13.20.1 Key Facts

13.20.2 Business Description

13.20.3 Products and Services

13.20.4 Financial Overview

13.20.5 SWOT Analysis

13.20.6 Key Developments

14. APPENDIX

14.1 Glossary

14.2 About The Insight Partners

List Of Tables

LIST OF TABLES

Table 1. Asia Pacific Geographic Information System (GIS) Market Segmentation

Table 2. Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Table 3. Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021-2031 (US\$ Million) - by Component

Table 4. Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021-2031 (US\$ Million) - by Function

Table 5. Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021-2031 (US\$ Million) - by End User

Table 6. Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021-2031 (US\$ Million) - by Country

Table 7. China: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Component

Table 8. China: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Hardware

Table 9. China: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Software

Table 10. China: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Function

Table 11. China: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by End User

Table 12. Japan: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Component

Table 13. Japan: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Hardware

Table 14. Japan: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Software

Table 15. Japan: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Function

Table 16. Japan: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by End User

Table 17. India: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Component

Table 18. India: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Hardware

Table 19. India: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Software

Table 20. India: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Function

Table 21. India: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by End User

Table 22. South Korea: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Component

Table 23. South Korea: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Hardware

Table 24. South Korea: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Software

Table 25. South Korea: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Function

Table 26. South Korea: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by End User

Table 27. Australia: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Component

Table 28. Australia: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Hardware

Table 29. Australia: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Software

Table 30. Australia: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Function

Table 31. Australia: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by End User

Table 32. Rest of APAC: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Component

Table 33. Rest of APAC: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Hardware

Table 34. Rest of APAC: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Software

Table 35. Rest of APAC: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Function

Table 36. Rest of APAC: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by End User

List Of Figures

LIST OF FIGURES

Figure 1. Asia Pacific Geographic Information System (GIS) Market Segmentation - Country

Figure 2. Ecosystem Analysis

Figure 3. Asia Pacific Geographic Information System (GIS) Market - Key Market Dynamics

Figure 4. Impact Analysis of Drivers and Restraints

Figure 5. Asia Pacific Geographic Information System (GIS) Market Revenue (US\$ Million), 2021-2031

Figure 6. Asia Pacific Geographic Information System (GIS) Market Share (%) - by Component (2023 and 2031)

Figure 7. Hardware: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 8. Software: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 9. Services: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 10. Asia Pacific Geographic Information System (GIS) Market Share (%) - by Function (2023 and 2031)

Figure 11. Mapping: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 12. Surveying: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 13. Telematics and Navigation: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 14. Location-based Services: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 15. Asia Pacific Geographic Information System (GIS) Market Share (%) - by End User (2023 and 2031)

Figure 16. Agriculture: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 17. Oil and Gas: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 18. Construction: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 19. Mining: Asia Pacific Geographic Information System (GIS) Market - Revenue

and Forecast, 2021-2031 (US\$ Million)

Figure 20. Transportation: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 21. Energy and Power: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 22. Others: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 23. Asia Pacific Geographic Information System (GIS) Market Breakdown, by Key Countries, 2023 and 2031 (%)

Figure 24. China: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021- 2031 (US\$ Million)

Figure 25. Japan: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021- 2031 (US\$ Million)

Figure 26. India: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021- 2031 (US\$ Million)

Figure 27. South Korea: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021- 2031 (US\$ Million)

Figure 28. Australia: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021- 2031 (US\$ Million)

Figure 29. Rest of APAC: Asia Pacific Geographic Information System (GIS) Market - Revenue and Forecast, 2021- 2031 (US\$ Million)

Figure 30. Heat Map Analysis by Key Players

Figure 31. Company Positioning and Concentration

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