

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

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Abstracts

The European geographic information system (GIS) market is projected to grow significantly, reaching approximately US\$ 5,940.80 million by 2031, up from US\$ 3,073.37 million in 2023, reflecting a compound annual growth rate (CAGR) of 8.6% during this period.

Executive Summary and Market Analysis

The growth of the GIS market in Europe is primarily fueled by rising demand from the automotive and construction industries. According to the European Automobile Manufacturers' Association (ACEA), vehicle production in Europe reached 18 million units in 2023, with over 12 million passenger cars produced in the European Union, marking an 11.3% increase from 2022. Automotive companies are increasingly integrating GIS technologies to enhance mapping and navigation capabilities. For instance, General Motors has implemented spatial analytics solutions across its network of over 4,300 dealers to better serve both local and global markets.

In 2022, the automotive sector in Europe accounted for about 20% of global vehicle production. The trend towards connected vehicles is accelerating, with these vehicles incorporating GIS technologies alongside software and hardware solutions. Prominent GIS solutions include ArcGIS, QGIS, and SAGA GIS. This adoption is driven by consumer preferences, regulatory requirements, safety standards, and the growing implementation of advanced driver assistance systems (ADAS) and vehicle-to-everything (V2X) communication. European governments are actively promoting connected vehicle initiatives to improve road safety and reduce emissions. One such

initiative is the Cooperative Intelligent Transport Systems (C-ITS) project, which facilitates information exchange between vehicles and road infrastructure. The C-ROADS Platform is being developed to standardize C-ITS operations across Europe, with significant investments from countries like Germany, Spain, France, and the UK in infrastructure for connected mobility. For example, Spain is working on its first intelligent highways, utilizing Kapsch TrafficCom's technology to digitize a 60 km stretch of the A8 motorway by 2024. Additionally, the EU Commission plans to invest over US\$ 7.62 billion in safe and sustainable transportation infrastructure projects, supporting more than 134 initiatives under the Connecting Europe Facility (CEF).

Market Segmentation Analysis

The European 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 dominant function in 2023.

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

Market Outlook

GIS technology plays a crucial role in smart city initiatives, aiding in site selection, land acquisition, urban planning, design, visualization, construction, project management, and reporting. The smart city market is rapidly expanding, with significant government investments. The Organisation for Economic Co-operation and Development (OECD) reported that the smart city market was valued at US\$ 511.6 billion in 2022 and is expected to reach US\$ 1,024 billion by 2027, growing at a CAGR of 15%. GIS-

integrated solutions, such as Building Information Modeling (BIM), are increasingly utilized in urban planning and construction. As of 2023, over 170 smart city projects have been initiated across Europe, with major investments from countries like the Netherlands, Italy, Germany, France, and Spain. The European Investment Bank has allocated over US\$ 23.13 billion to support sustainable smart city developments, further driving the GIS market.

Country Insights

The European GIS market includes key countries such as the UK, Germany, France, Russia, Italy, and others, with the UK holding the largest market share in 2023. The UK construction sector is among the largest globally, with new construction output reaching a record US\$ 130 billion in 2022, a 16% increase from the previous year. Residential construction accounted for over 42% of this output. The UK government has also increased infrastructure investments to US\$ 19 billion in 2023, a 3.9% rise from 2022, indicating a robust demand for GIS technologies in construction and infrastructure projects.

Company Profiles

Key players in the European 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 offerings and increase market share.

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