

Middle East & Africa GNSS Chip for Timing and Synchronization Market Size and Forecast (2021 - 2031)

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Abstracts

The Middle East and Africa (MEA) GNSS (Global Navigation Satellite System) chip market for timing and synchronization is projected to grow significantly, reaching approximately US\$ 13,361.7 thousand by 2031, up from US\$ 8,460.3 thousand in 2024. This growth represents a compound annual growth rate (CAGR) of 7.0% from 2025 to 2031, indicating a robust demand for GNSS technology in the region.

Executive Summary and Market Analysis

The MEA GNSS chip market is categorized into several key regions, including Saudi Arabia, the United Arab Emirates (UAE), South Africa, and other parts of the MEA. As these countries strive to diversify their economies and reduce reliance on oil revenues, they are implementing various initiatives to foster technological advancement. For instance, Saudi Vision 2030 aims to enhance the digital infrastructure across the nation. A notable development is Zain KSA's plan to deploy 5G Standalone networks using low-band spectrum, starting in major cities like Riyadh and Jeddah by June 2025. This rollout is expected to improve nationwide coverage and service quality, facilitating next-generation features such as Voice over New Radio (VoNR), RedCap device compatibility, and network slicing for both business and consumer applications. The demand for GNSS chips is directly linked to these advancements, as they provide the precise timing signals essential for the effective operation of 5G networks.

According to the GSMA's Mobile Economy Middle East and North Africa 2023 report, 5G networks are now covering over 75% of the population in Gulf Cooperation Council (GCC) countries, including Saudi Arabia, the UAE, Qatar, and Kuwait. This rapid adoption positions the MENA region as a global leader in 5G technology, further driving

the need for GNSS chips.

Market Segmentation Analysis

The MEA GNSS chip market for timing and synchronization is segmented by device and industry vertical. In terms of devices, the market includes Cellular Network Devices, Small Cells, Public Mobile Radios (PMR), Phasor Measurement Units (PMU), and others. In 2024, the 'Others' category held the largest market share. When segmented by industry vertical, the market comprises Telecom and IT, Energy, Banking, Financial Services, and Insurance (BFSI), Consumer Electronics, Automotive and Transportation, and others. The Telecom and IT sector dominated the market in 2024, reflecting the critical role of GNSS technology in these industries.

Market Outlook

The evolution of hybrid timing architectures is transforming how the telecom and critical infrastructure sectors approach synchronization. While these architectures aim to reduce dependence on GNSS, they still rely on it as a primary or reference timing source. This reliance creates lucrative opportunities within the GNSS timing and synchronization market. For example, modern digital fixed-line networks are increasingly utilizing a hybrid architecture that combines atomic clocks with GNSS as the main time and frequency reference. A notable project initiated by Telespazio in 2020 aimed to develop a hybrid timing system that integrates GNSS with other technologies to enhance resilience and accuracy. This system utilized GNSS alongside Satellite-Based Augmentation Systems (SBAS) and incorporated miniature atomic clocks for holdover during GNSS signal loss. Additionally, backup timing sources such as Low Earth Orbit (LEO) satellites and low-frequency signals like eLORAN were employed. This trend towards hybrid timing architectures is becoming increasingly significant in the GNSS chip market.

Country Insights

The MEA GNSS chip market is further segmented by country, including the UAE, Saudi Arabia, South Africa, and the Rest of the MEA. In 2024, the Rest of the MEA held the largest market share, with countries like Qatar, Egypt, and Kuwait contributing significantly to the market. The banking sector in these regions is undergoing rapid digital transformation, with financial institutions integrating mobile banking, artificial intelligence, and blockchain technologies. In this evolving landscape, precise timing and synchronization are crucial for seamless digital operations, particularly in secure

transactions, real-time account reconciliation, and fraud detection. As banks continue to digitize, the demand for GNSS chips that provide high-accuracy time synchronization is expected to rise.

Smartphone adoption is also a key driver of GNSS chip demand. According to the GSM Association, in 2022, 72% of the population in Iran had adopted smartphones, with projections indicating that around 87% will do so by 2030. Similarly, Turkey saw a smartphone adoption rate of 89% in 2022, with expectations of 94% by 2030. This high adoption rate is fueling demand for GNSS chips, as they enable location-based financial services, digital payments, and mobile banking.

Company Profiles

Key players in the MEA GNSS chip for timing and synchronization market include STMicroelectronics NV, Broadcom Inc, Safran SA, NovAtel Inc., Septentrio NV, u-blox Holding AG, Quectel Wireless Solutions Co., Ltd., Furuno Electric Co., Ltd., LOCOSYS Technology Inc., and Proteмпis, LLC. These companies are employing various strategies, including expansion, product innovation, and mergers and acquisitions, to enhance their market presence and offer innovative products 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. GNSS CHIP FOR TIMING AND SYNCHRONIZATION MARKET LANDSCAPE

- 4.1 Market Overview
- 4.2 PEST Analysis
- 4.3 Ecosystem Analysis
 - 4.3.1 Raw Material Suppliers
 - 4.3.2 Manufacturers
 - 4.3.3 Distributors or Suppliers
 - 4.3.4 End-Use Industry
 - 4.3.5 List of Vendors in the Value Chain
- 4.4 Impact of Trump's Reciprocal Tariffs

5. MIDDLE EAST & AFRICA GNSS CHIP FOR TIMING AND SYNCHRONIZATION MARKET - KEY MARKET DYNAMICS

- 5.1 Market Drivers
- 5.2 Market Restraints

5.3 Market Opportunities

5.4 Future Trends

5.5 Impact of Drivers and Restraints:

6. GNSS CHIP FOR TIMING AND SYNCHRONIZATION MARKET - MIDDLE EAST & AFRICA MARKET ANALYSIS

6.1 Middle East & Africa GNSS Chip for Timing and Synchronization Market Revenue (US\$ Thousand), 2024 - 2031

6.2 Middle East & Africa GNSS Chip for Timing and Synchronization Market Forecast and Analysis

7. MIDDLE EAST & AFRICA GNSS CHIP FOR TIMING AND SYNCHRONIZATION MARKET REVENUE ANALYSIS - BY DEVICE

7.1 Cellular Network Devices

7.1.1 Overview

7.1.2 Cellular Network Devices: Middle East & Africa GNSS Chip for Timing and Synchronization Market - Revenue and Forecast, 2021 - 2031 (US\$ Thousand)

7.2 Small Cells

7.2.1 Overview

7.2.2 Small Cells: Middle East & Africa GNSS Chip for Timing and Synchronization Market - Revenue and Forecast, 2021 - 2031 (US\$ Thousand)

7.3 Public Mobile Radios (PMR)

7.3.1 Overview

7.3.2 Public Mobile Radios (PMR): Middle East & Africa GNSS Chip for Timing and Synchronization Market - Revenue and Forecast, 2021 - 2031 (US\$ Thousand)

7.4 Phazor Measurement Units (PMU)

7.4.1 Overview

7.4.2 Phazor Measurement Units (PMU): Middle East & Africa GNSS Chip for Timing and Synchronization Market - Revenue and Forecast, 2021 - 2031 (US\$ Thousand)

7.5 Others

7.5.1 Overview

7.5.2 Others: Middle East & Africa GNSS Chip for Timing and Synchronization Market - Revenue and Forecast, 2021 - 2031 (US\$ Thousand)

8. MIDDLE EAST & AFRICA GNSS CHIP FOR TIMING AND SYNCHRONIZATION MARKET REVENUE ANALYSIS - BY INDUSTRY VERTICAL

8.1 Telecom and IT

8.1.1 Overview

8.1.2 Telecom and IT: Middle East & Africa GNSS Chip for Timing and Synchronization Market - Revenue and Forecast, 2021 - 2031 (US\$ Thousand)

8.2 Energy

8.2.1 Overview

8.2.2 Energy: Middle East & Africa GNSS Chip for Timing and Synchronization Market - Revenue and Forecast, 2021 - 2031 (US\$ Thousand)

8.3 BFSI

8.3.1 Overview

8.3.2 BFSI: Middle East & Africa GNSS Chip for Timing and Synchronization Market - Revenue and Forecast, 2021 - 2031 (US\$ Thousand)

8.4 Consumer Electronics

8.4.1 Overview

8.4.2 Consumer Electronics: Middle East & Africa GNSS Chip for Timing and Synchronization Market - Revenue and Forecast, 2021 - 2031 (US\$ Thousand)

8.5 Automotive and Transportation

8.5.1 Overview

8.5.2 Automotive and Transportation: Middle East & Africa GNSS Chip for Timing and Synchronization Market - Revenue and Forecast, 2021 - 2031 (US\$ Thousand)

8.6 Others

8.6.1 Overview

8.6.2 Others: Middle East & Africa GNSS Chip for Timing and Synchronization Market - Revenue and Forecast, 2021 - 2031 (US\$ Thousand)

9. MIDDLE EAST & AFRICA GNSS CHIP FOR TIMING AND SYNCHRONIZATION MARKET - COUNTRY ANALYSIS

9.1 Middle East & Africa

9.1.1 Middle East & Africa GNSS Chip for Timing and Synchronization Market Revenue and Forecast and Analysis - by Country

9.1.1.1 Middle East & Africa GNSS Chip for Timing and Synchronization Market Revenue and Forecast and Analysis - by Country

9.1.2 United Arab Emirates: Middle East & Africa GNSS Chip for Timing and Synchronization Market - Revenue and Forecast, 2021 - 2031 (US\$ Thousand)

9.1.2.2.1 United Arab Emirates: Middle East & Africa GNSS Chip for Timing and Synchronization Market Share - by Device

9.1.2.2.2 United Arab Emirates: Middle East & Africa GNSS Chip for Timing and Synchronization Market Share - by Industry Vertical

9.2.3.3 Saudi Arabia: Middle East & Africa GNSS Chip for Timing and Synchronization Market - Revenue and Forecast, 2021 - 2031 (US\$ Thousand)

9.2.3.3.1 Saudi Arabia: Middle East & Africa GNSS Chip for Timing and Synchronization Market Share - by Device

9.2.3.3.2 Saudi Arabia: Middle East & Africa GNSS Chip for Timing and Synchronization Market Share - by Industry Vertical

9.3.4.4 South Africa: Middle East & Africa GNSS Chip for Timing and Synchronization Market - Revenue and Forecast, 2021 - 2031 (US\$ Thousand)

9.3.4.4.1 South Africa: Middle East & Africa GNSS Chip for Timing and Synchronization Market Share - by Device

9.3.4.4.2 South Africa: Middle East & Africa GNSS Chip for Timing and Synchronization Market Share - by Industry Vertical

9.4.5.5 Rest of Middle East & Africa : Middle East & Africa GNSS Chip for Timing and Synchronization Market - Revenue and Forecast, 2021 - 2031 (US\$ Thousand)

9.4.5.5.1 Rest of Middle East & Africa : Middle East & Africa GNSS Chip for Timing and Synchronization Market Share - by Device

9.4.5.5.2 Rest of Middle East & Africa : Middle East & Africa GNSS Chip for Timing and Synchronization Market Share - by Industry Vertical

10 COMPETITIVE LANDSCAPE

10.1 Heat Map Analysis by Key Players

10.2 Company Positioning & Concentration

11 INDUSTRY LANDSCAPE

11.1 Overview

11.2 New Product Development

11.3 Merger and Acquisition

11.4 Other Strategic Developments

12 COMPANY PROFILES

12.1 STMicroelectronics NV

12.1.1 Key Facts

12.1.2 Business Description

12.1.3 Products and Services

12.1.4 Financial Overview

12.1.5 SWOT Analysis

- 12.1.6 Key Developments
- 12.2 Broadcom Inc
 - 12.2.1 Key Facts
 - 12.2.2 Business Description
 - 12.2.3 Products and Services
 - 12.2.4 Financial Overview
 - 12.2.5 SWOT Analysis
 - 12.2.6 Key Developments
- 12.3 Safran SA
 - 12.3.1 Key Facts
 - 12.3.2 Business Description
 - 12.3.3 Products and Services
 - 12.3.4 Financial Overview
 - 12.3.5 SWOT Analysis
 - 12.3.6 Key Developments
- 12.4 NovAtel Inc.
 - 12.4.1 Key Facts
 - 12.4.2 Business Description
 - 12.4.3 Products and Services
 - 12.4.4 Financial Overview
 - 12.4.5 SWOT Analysis
 - 12.4.6 Key Developments
- 12.5 Septentrio NV
 - 12.5.1 Key Facts
 - 12.5.2 Business Description
 - 12.5.3 Products and Services
 - 12.5.4 Financial Overview
 - 12.5.5 SWOT Analysis
 - 12.5.6 Key Developments
- 12.6 u-blox Holding AG
 - 12.6.1 Key Facts
 - 12.6.2 Business Description
 - 12.6.3 Products and Services
 - 12.6.4 Financial Overview
 - 12.6.5 SWOT Analysis
 - 12.6.6 Key Developments
- 12.7 Quectel Wireless Solutions Co Ltd
 - 12.7.1 Key Facts
 - 12.7.2 Business Description

- 12.7.3 Products and Services
- 12.7.4 Financial Overview
- 12.7.5 SWOT Analysis
- 12.7.6 Key Developments
- 12.8 Furuno Electric Co Ltd
 - 12.8.1 Key Facts
 - 12.8.2 Business Description
 - 12.8.3 Products and Services
 - 12.8.4 Financial Overview
 - 12.8.5 SWOT Analysis
 - 12.8.6 Key Developments
- 12.9 LOCOSYS Technology Inc.
 - 12.9.1 Key Facts
 - 12.9.2 Business Description
 - 12.9.3 Products and Services
 - 12.9.4 Financial Overview
 - 12.9.5 SWOT Analysis
 - 12.9.6 Key Developments
- 12.10 Protempis, LLC
 - 12.10.1 Key Facts
 - 12.10.2 Business Description
 - 12.10.3 Products and Services
 - 12.10.4 Financial Overview
 - 12.10.5 SWOT Analysis
 - 12.10.6 Key Developments

13. APPENDIX

13.1 About The Insight Partners

List Of Tables

LIST OF TABLES

Table 1. Middle East & Africa GNSS Chip for Timing and Synchronization Market Segmentation

Table 2. List of Vendors

Table 3. Middle East & Africa GNSS Chip for Timing and Synchronization Market - Revenue and Forecast, 2021 - 2031 (US\$ Thousand)

Table 4. Middle East & Africa GNSS Chip for Timing and Synchronization Market - Revenue and Forecast, 2021 - 2031 (US\$ Thousand) - by Device

Table 5. Middle East & Africa GNSS Chip for Timing and Synchronization Market - Revenue and Forecast, 2021 - 2031 (US\$ Thousand) - by Industry Vertical

Table 6. Middle East & Africa GNSS Chip for Timing and Synchronization Market - Revenue and Forecast, 2021 - 2031 (US\$ Thousand) - by Country

Table 7. United Arab Emirates: Middle East & Africa GNSS Chip for Timing and Synchronization Market - Revenue and Forecast, 2021 - 2031 (US\$ Thousand) - by Device

Table 8. United Arab Emirates: Middle East & Africa GNSS Chip for Timing and Synchronization Market - Revenue and Forecast, 2021 - 2031 (US\$ Thousand) - by Industry Vertical

Table 9. Saudi Arabia: Middle East & Africa GNSS Chip for Timing and Synchronization Market - Revenue and Forecast, 2021 - 2031 (US\$ Thousand) - by Device

Table 10. Saudi Arabia: Middle East & Africa GNSS Chip for Timing and Synchronization Market - Revenue and Forecast, 2021 - 2031 (US\$ Thousand) - by Industry Vertical

Table 11. South Africa: Middle East & Africa GNSS Chip for Timing and Synchronization Market - Revenue and Forecast, 2021 - 2031 (US\$ Thousand) - by Device

Table 12. South Africa: Middle East & Africa GNSS Chip for Timing and Synchronization Market - Revenue and Forecast, 2021 - 2031 (US\$ Thousand) - by Industry Vertical

Table 13. Rest of Middle East & Africa : Middle East & Africa GNSS Chip for Timing and Synchronization Market - Revenue and Forecast, 2021 - 2031 (US\$ Thousand) - by Device

Table 14. Rest of Middle East & Africa : Middle East & Africa GNSS Chip for Timing and Synchronization Market - Revenue and Forecast, 2021 - 2031 (US\$ Thousand) - by Industry Vertical

Table 15. Heat Map Analysis by Key Players

List Of Figures

LIST OF FIGURES

Figure 1. Middle East & Africa GNSS Chip for Timing and Synchronization Market Segmentation - Country

Figure 2. PEST Analysis

Figure 3. Ecosystem: GNSS Chip for Timing and Synchronization Market

Figure 4. Middle East & Africa GNSS Chip for Timing and Synchronization Market - Key Market Dynamics

Figure 5. Impact Analysis of Drivers and Restraints

Figure 6. Middle East & Africa GNSS Chip for Timing and Synchronization Market Revenue (US\$ Thousand), 2024 - 2031

Figure 7. Middle East & Africa GNSS Chip for Timing and Synchronization Market Share (%) - by Device, 2024 and 2031

Figure 8. Cellular Network Devices: Middle East & Africa GNSS Chip for Timing and Synchronization Market - Revenue and Forecast, 2021 - 2031 (US\$ Thousand)

Figure 9. Small Cells: Middle East & Africa GNSS Chip for Timing and Synchronization Market - Revenue and Forecast, 2021 - 2031 (US\$ Thousand)

Figure 10. Public Mobile Radios (PMR): Middle East & Africa GNSS Chip for Timing and Synchronization Market - Revenue and Forecast, 2021 - 2031 (US\$ Thousand)

Figure 11. Phazor Measurement Units (PMU): Middle East & Africa GNSS Chip for Timing and Synchronization Market - Revenue and Forecast, 2021 - 2031 (US\$ Thousand)

Figure 12. Others: Middle East & Africa GNSS Chip for Timing and Synchronization Market - Revenue and Forecast, 2021 - 2031 (US\$ Thousand)

Figure 13. Middle East & Africa GNSS Chip for Timing and Synchronization Market Share (%) - by Industry Vertical, 2024 and 2031

Figure 14. Telecom and IT: Middle East & Africa GNSS Chip for Timing and Synchronization Market - Revenue and Forecast, 2021 - 2031 (US\$ Thousand)

Figure 15. Energy: Middle East & Africa GNSS Chip for Timing and Synchronization Market - Revenue and Forecast, 2021 - 2031 (US\$ Thousand)

Figure 16. BFSI: Middle East & Africa GNSS Chip for Timing and Synchronization Market - Revenue and Forecast, 2021 - 2031 (US\$ Thousand)

Figure 17. Consumer Electronics: Middle East & Africa GNSS Chip for Timing and Synchronization Market - Revenue and Forecast, 2021 - 2031 (US\$ Thousand)

Figure 18. Automotive and Transportation: Middle East & Africa GNSS Chip for Timing and Synchronization Market - Revenue and Forecast, 2021 - 2031 (US\$ Thousand)

Figure 19. Others: Middle East & Africa GNSS Chip for Timing and Synchronization Market - Revenue and Forecast, 2021 - 2031 (US\$ Thousand)

Figure 20. Middle East & Africa GNSS Chip for Timing and Synchronization Market Breakdown by Key Countries, 2024 and 2031 (%)

Figure 21. United Arab Emirates: Middle East & Africa GNSS Chip for Timing and Synchronization Market - Revenue and Forecast, 2021 - 2031 (US\$ Thousand)

Figure 22. Saudi Arabia: Middle East & Africa GNSS Chip for Timing and Synchronization Market - Revenue and Forecast, 2021 - 2031 (US\$ Thousand)

Figure 23. South Africa: Middle East & Africa GNSS Chip for Timing and Synchronization Market - Revenue and Forecast, 2021 - 2031 (US\$ Thousand)

Figure 24. Rest of Middle East & Africa : Middle East & Africa GNSS Chip for Timing and Synchronization Market - Revenue and Forecast, 2021 - 2031 (US\$ Thousand)

Figure 25. Company Market Share Analysis, 2024

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