

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

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Abstracts

The North American geographic information system (GIS) market is projected to grow significantly, reaching approximately USD 6,316.30 million by 2031, up from USD 3,567.59 million in 2023, reflecting a compound annual growth rate (CAGR) of 7.4% during this period.

Executive Summary and Market Analysis

The North American GIS market encompasses the economies of the United States, Canada, and Mexico. A key driver of this market is the expansion of aircraft fleets in the region, which is particularly influential in the flight planning software sector. The aviation industry is a major contributor to the US economy, accounting for 5% of the GDP and generating USD 1.37 trillion in 2023, according to Airlines for America. The increase in air passenger traffic, coupled with government initiatives to expand aircraft fleets in both defense and commercial sectors, is expected to boost the demand for flight management solutions, including flight planning software.

As of 2023, North America had over 8,000 operational commercial aircraft, with projections suggesting this number could rise to around 10,000 by 2033. This growth in the commercial fleet will likely drive the demand for flight planning software, which is essential for optimizing flight routes, scheduling, reducing fuel consumption, and forecasting weather conditions. Additionally, heightened regulations regarding traveler safety and security are further propelling the flight planning software market.

Market Segmentation Analysis

The North American GIS market can be segmented by component, function, and end user.

By 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 is further categorized into desktop GIS, server GIS, developer GIS, mobile GIS, and remote sensing software.

By Function: The market is segmented into mapping, surveying, telematics and navigation, and location-based services, with mapping being the dominant function in 2023.

By 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

GIS technology plays a crucial role in accurately forecasting natural disasters such as storms, hurricanes, and heavy rainfall. It provides essential spatial data and analysis that help predict and mitigate the impacts of these events. The USA Facts Organization reports that the US experiences over 65,000 natural disasters annually, with significant economic impacts. From 1980 to 2023, the US recorded over 400 weather-related disasters, costing more than USD 2.78 trillion. In November 2024 alone, 24 weather-related disasters were confirmed, each costing over USD 1 billion. This ongoing need for disaster forecasting is a significant factor driving the growth of the GIS market.

Country Insights

The North American GIS market is primarily composed of the US, Canada, and Mexico, with the US holding the largest market share in 2023. The US is experiencing a surge in oil and gas projects, where GIS is utilized for monitoring and predicting geohazards. Major projects include the Alaska LNG Liquefaction Plant and the Cameron LNG

Liquefaction Plant, among others.

According to the International Trade Administration (ITA), the US will continue to lead the GIS market due to its large consumer base, robust infrastructure, favorable investment policies, strong R&D capabilities, and incentives from local and state governments. GIS technology is also instrumental in traffic management across the extensive road networks in the US. Furthermore, the construction industry is booming, with residential construction spending reaching approximately USD 911.43 billion and non-residential spending at USD 1.22 trillion as of August 2024. GIS is widely applied in site analysis, infrastructure planning, and project management, contributing to the growth of the GIS market in the US.

Company Profiles

Key players in the North American GIS market include Autodesk Inc, Topcon Corp, Caliper Corp, SuperMap Software Co Ltd, Hi-Target, Precisely, Maxar Technologies Inc, Trimble Inc, AmigoCloud Inc, Bentley Systems Inc, Hexagon AB, Cadcorp Limited, Spatialworks Sdn Bhd, Environmental Systems Research Institute, Inc., Blue Marble Geographics, TomTom International B.V., FARO Technologies Inc, L3Harris Technologies Inc, Basarsoft Bilgi Teknolojileri A.S., and Carto. These companies are pursuing various strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence and offer innovative solutions to consumers.

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