

South & Central America GNSS Chip Market Size and Forecast (2021 - 2031), Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Device (Smartphones, Tablets, Personal Navigation Devices, In-Vehicle Systems, and Other Devices), Application (Navigation & Location-Based Services, Mapping and Surveying, Telematics, Timing & Synchronization, and Other Applications), and Vertical (Consumer Electronics, Automotive & Transportation, Military and Defense, Marine, and Other Verticals)

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Abstracts

The South & Central America Global Navigation Satellite System (GNSS) chip market is projected to grow significantly, reaching an estimated US\$ 314.06 million by 2031, up from US\$ 222.17 million in 2024. This growth represents a compound annual growth rate (CAGR) of 5.1% from 2024 to 2031, indicating a robust expansion in the region's GNSS technology adoption.

Executive Summary and Market Analysis

The GNSS chip market in South & Central America (SAM) is primarily segmented into three key regions: Brazil, Argentina, and the Rest of South & Central America. Among these, Brazil is expected to dominate the market due to its increasing investment in GNSS services and technology. The consumer electronics sector is one of the fastest-growing industries in the region, driven by the emergence of innovative technologies that enhance the functionality and applications of GNSS chips.

A notable development in the market occurred in January 2024, when u-blox, a global leader in positioning and wireless communication technology, partnered with Nordion, a US-based precision location technology company. This collaboration aims to expand the PointPerfect GNSS correction service into Brazil, targeting high-precision applications across various sectors, including agriculture, robotics, automation, micro-mobility, and automotive navigation. The increasing adoption of GNSS chips is attributed to their versatility and application across multiple industries, such as consumer electronics, transportation, aviation, drones, maritime, emergency response, rail, agriculture, geomatics, and critical infrastructure.

Strategic Insights

Market Segmentation Analysis

The South & Central America GNSS chip market can be analyzed through several key segments: device type, application, and vertical industry.

1. **Device Segmentation:** The market is divided into smartphones, tablets, personal navigation devices, in-vehicle systems, and others. In 2024, smartphones are expected to hold the largest market share, reflecting the widespread use of GNSS technology in mobile devices.
2. **Application Segmentation:** The applications of GNSS chips include navigation and location-based services, mapping and surveying, telematics, timing and synchronization, among others. The navigation and location-based services segment is anticipated to dominate the market in 2024, driven by the increasing demand for accurate positioning and navigation solutions.
3. **Vertical Segmentation:** The market is also categorized by verticals such as consumer electronics, automotive and transportation, military and defense, marine, and others. The consumer electronics segment is projected to hold the largest share in 2024, reflecting the growing integration of GNSS technology in everyday devices.

Market Outlook

Technological advancements in unmanned aerial vehicles (UAVs) and unmanned ground vehicles (UGVs) are rapidly evolving, contributing to the growth of the GNSS chip market. The demand for these vehicles is expected to rise due to innovations such

as sense-and-avoid systems, artificial intelligence, and cloud computing. The integration of AI enhances the capabilities of UAVs and UGVs, allowing for improved navigation, data capture, and analysis without human intervention.

GNSS chips play a crucial role in providing precise real-time positioning information, which is essential for various applications, including surveying, search and rescue operations, autonomous delivery, mapping, and military missions. The increasing reliance on GNSS technology for tracking and navigation in UGVs and UAVs is anticipated to be a significant trend in the market during the forecast period. As these vehicles become more autonomous, the need for human oversight diminishes, enabling them to perform tasks more efficiently and safely. High-precision GNSS solutions are vital for the effective navigation of UAVs and UGVs, ensuring stability during flight, obstacle avoidance, and route optimization.

Country Insights

The South & Central America GNSS chip market is further analyzed by country, with Brazil leading the market share in 2024. The growing popularity of augmented reality (AR) in Brazil is a key driver for GNSS adoption, as GNSS technology facilitates the integration of digital objects with the physical environment. Companies are actively enhancing GNSS services in Brazil, exemplified by the collaboration between Nordian and u-blox to extend the PointPerfect GNSS correction service, which supports high-precision applications across various sectors.

Company Profiles

Key players in the South & Central America GNSS chip market include Qualcomm Inc, Broadcom Inc, Septentrio NV, Trimble Inc, Furuno Electric Co Ltd, MediaTek Inc, STMicroelectronics NV, Skyworks Solutions Inc, u-blox Holding AG, and Quectel Wireless Solutions Co Ltd. These companies are employing various strategies such as market expansion, product innovation, and mergers and acquisitions to enhance their offerings and increase their market presence.

In conclusion, the South & Central America GNSS chip market is poised for significant growth, driven by technological advancements, increasing demand across various sectors, and strategic collaborations among key industry players.

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