The Global Military GPS/GNSS Market 2013-2023

Description: This report is the result of extensive market and company research covering the global military GPS/GNSS industry. It provides detailed analysis of both historic and forecast global industry values, factors influencing demand, the challenges faced by industry participants, analysis of the leading companies in the industry, and key news.

Why was the report written?

'The Global Military GPS/GNSS Market 2013-2023' offers the reader detailed analysis of the global military GPS/GNSS market over the next ten years, alongside potential market opportunities to enter the industry, using detailed market size forecasts.

What are the key drivers behind recent market changes?

A satellite navigation system provides GPS positioning from a global perspective, and is therefore of utmost importance for modern day military operations which rely on accurate real time data on hostile forces in order to carry out precision attacks. It is here that GPS/GNSS devices assume an important role, as they are imperative to transfer signals from these satellites back to earth. Several major defense spenders across the world have now launched, or initiated the development of indigenous satellite navigation systems.

In July 2013, India launched the IRNSS-1A, the first of seven satellite constellation to be deployed under the Indian Regional Navigation Satellite System (IRNSS) program to be completed between 2015-2016. China is also developing its indigenous BeiDou satellite navigation system, which is scheduled to be operational by 2020. Another factor driving the market is the integration of satellite navigation technology with other navigation systems, such as the Inertial Navigation System (INS) and Gyro, as GPS devices are to be used in order to decipher data correctly. The US is the highest spender on military GPS/GNSS navigation, and is responsible for 42.9% of the global military GNSS devices market. Others major spenders in this sector include Russia, the UK, China and India.

The increasing demand for satellite navigation and communications is driven primarily by the desire of militaries to monitor more areas and derive accurate information by a range of GNSS receivers/sensors in the shortest time possible. Major military aircraft and helicopters are dependent on GPS embedded INS systems for effective navigation. Similarly, naval vessels and guided munitions are increasingly relying on the collaboration of Laser, Gyro, INS and satellite navigation technologies to derive accurate real time data. Furthermore, it has been observed that the usage of Standard Positioning Services/Open Service receivers which use unencrypted signal for non-combat purposes has increased, and is expected to drive demand and encourage expenditure.

What makes this report unique and essential to read?

'The Global Military GPS/GNSS Market 2013-2023' provides detailed analysis of the current industry size and growth expectations from 2013 to 2023, including highlights of key growth stimulators. It also benchmarks the industry against key global markets and provides detailed understanding of emerging opportunities in specific areas.

Key Features and Benefits

The report provides detailed analysis of the market for military GPS/GNSS during 2013-2023, including the factors that influence why countries are investing or cutting expenditure on military GPS/GNSS. It provides detailed expectations of growth rates and projected total expenditure.

The defense ministries of major countries in the satellite navigation market, such as the US, China, Russia, and some countries in Europe, are increasingly allocating resources to develop GNSS infrastructure that is compatible and interoperable. With the number of satellites launched into orbit expected to reach 90 platforms in the next five years, and manufacturers are expected to face a challenge to design interoperable GNSS hardware and software.
This opportunity is expected to prompt manufacturers to form joint ventures and partnerships, which will not only reduce development costs, but also leverage each other's strengths. Additionally this would enhance the indigenous capabilities of domestic firms, with an option to cater to new markets in the same segment. Some notable joint ventures are listed below:

- In 2013, Locata Corporation and The Air Force Institute of Technology (AFIT) have partnered to build a new Locata multipath mitigation technology for use in GPS receivers. The company is expected to transfer technology to help AFIT to develop an initial multi-element GPS-based switching antenna prototype. It is expected to test the several GPS-based versions of antenna array and its feasibility of being used in the military operations.

- In August 2012, Boeing, Harris Corp. and Raytheon partnered to work with the U.S. Air Force for GPS tracking and GPS ground hardware for a number of space vehicles. The team is known as the GPS Control Segment Sustainment Contract (GCSS) which is to bring in smooth transition including develop, test, and source software and hardware for the GPS OCX.

- Another major development took place in 2013, where VectorNav Technologies, formed a strategic partnership with Navtech GPS to market and include the VN-200 GPS/INS and the VN-100 IMU/AHRS into their GNSS-related products.

Key Market Issues

Using a GNSS/GPS receiver in mountainous or canyon areas, underground, steep terrains, tunnels, clothing, or any satellite denied environment, has proved to be problematic in military operations. Furthermore, armed forces are posed with the challenges of accurate positioning using the GPS/GNSS systems, when the receivers are unable to connect directly to the network due to lower penetration. This is a strong driver for various militaries who are now trying to reduce dependency on GPS/GNSS technology by creating a solution which works to collaborate between various technologies for better results. Companies are now trying to create synergy by combining both, terrestrial and satellite navigation to facilitate the creation of better positioning and navigation systems. To cite an example, Locata, a ground-based local positioning system, uses radio transmitters to provide positioning, navigation and timing (PNT) data where GPS signal is unavailable.

The US DoD has deployed the navigation system at White Sands Missile Range in New Mexico where GPS navigation failed to prove its ability. Furthermore, the US Air Force Institute of Technology (AFIT) and Locata Corporation have signed a co-operative research and development agreement (CRADA) to design and build a Locata multipath mitigation technology to be equipped in the GPS receivers. The initiative is directed to evaluate Locata's patented Vray switching antenna, and produce prototypes which will observe utility in military operations. Such developments are at a beginning phase and execution of these enhancements across countries will consume a larger time frame and greater fund allocation, thus remaining a challenge in the global GNSS devices market.

The magnetic storms and solar radio emissions have the capacity to destruct the satellite technical infrastructure posing a potential threat to the performance of GNSS/GPS navigation. Space weather events, such as solar storms can disturb GPS signals, interrupting navigation and creating difficult situations for nations to successfully carry out surveillance, or attack activities. Moreover, the damage would largely depend on the magnitude of the Solar flare where a large amount of energy is released and this may break the satellite communication completely. Additionally the larger flares that belong to 'X' category can create radio blackouts resulting in a malfunction in technology. In case of damage, armed forces which largely depend on GPS technology for either launching missiles or any munitions like GPS guided bombs will be required to halt the activity on temporary basis. Further, Ionospheric irregularities cause diffraction in which the GPS signals scatter and pose significant challenge for receivers at high latitudes.
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