

Military Navigation Systems Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> **Industry:** Military Aircraft & Defense Electronics (Aerospace & Defense)
> **Source:** https://www.mordorintelligence.com/industry-reports/military-navigation-systems-market (https://www.mordorintelligence.com/industry-reports/military-navigation-systems-market)
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 12.97 billion
Projected Forecast (2031)	USD 12.97 billion
Growth Rate (CAGR)	6.79 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

! [Major players in Military Navigation Systems industry] (images/chart_2.png)

! [Military Navigation Systems Market Size] (images/chart_3.png)

! [Military Navigation Systems Market Share by Platform, 2025] (images/chart_4.png)

! [Military Navigation Systems Market Share by Component, 2025] (images/chart_5.png)

! [Military Navigation Systems Market CAGR (%), Growth Rate by Region] (images/chart_6.png)

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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market Overview	Study Period	2020 - 2031
Market Size (2026)		USD 12.97 Billion
Market Size (2031)		USD 18.01 Billion
Growth Rate (2026 - 2031)		6.79 %
Fastest Growing Market		Asia Pacific
Largest Market		North America
Market Concentration		Medium

Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

Military Navigation Systems Market Analysis by Mordor Intelligence
The military navigation systems market size in 2026 is estimated at USD 12.97 billion, growing from 2025 value of USD 12.15 billion with 2031 projections showing USD 18.01 billion, growing at 6.79% CAGR over 2026-2031. Defense ministries are steadily increasing their spending on assured positioning, navigation, and timing (PNT) as unmanned platforms proliferate, while persistent jamming incidents expose the limitations of legacy Global Positioning System (GPS) receivers. The market is shifting toward hybrid architectures that blend multi-constellation Global Navigation Satellite System (GNSS), inertial sensors, and terrestrial beacons, enabling continuity of operations in contested electromagnetic environments. Quantum and MEMS-based inertial units are maturing, commercial low-Earth-orbit (LEO) PNT constellations are entering service, and export-controlled anti-jam antennas are seeing wider adoption. Incumbent primes retain scale advantages, yet software-defined solutions from startups are resetting competitive benchmarks for accuracy, size, weight, power, and cost.

Key Report Takeaways* By platform, airborne systems led the military navigation systems market with a 40.85% share in 2025, while the space segment is expected to post a 7.44% CAGR through 2031.

* By application, command and control (C2) accounted for 29.02% of 2025 revenue; search and rescue (SAR) is the fastest-growing use case at a 7.29% CAGR through 2031.

* By component, hardware retained 69.15% of 2025 sales, yet software is expanding at an 7.78% CAGR as AI-enabled sensor fusion gains traction.

* By geography, North America captured 38.25% of the 2025 revenue, whereas the Asia-Pacific region is rising fastest at a 7.62% CAGR, driven by the integration of BeiDou, NavIC, and QZSS.

Key Market Trends

Market Trends and Insights
Drivers Impact Analysis of Military Navigation Systems
Market*Driver | (~) % Impact on CAGR Forecast | Geographic Relevance | Impact Timeline |

Growing deployment of autonomous and unmanned military platforms | +1.4% | Global, especially North America and Asia-Pacific | Medium term (2-4 years) |

Increasing adoption of anti-jam and anti-spoof GNSS navigation systems | +1.3% | Europe and the broader Indo-Pacific | Short term (≤2 years) |

Rising defense modernization spending across Asia and the Middle East and Africa | +1.5% | Asia-Pacific core, spillover to Middle East and Africa | Long term (≥4 years) |

Government mandates for assured PNT capabilities | +1.2% | North America, Europe, allied Indo-Pacific nations | Medium term (2-4 years) |

Advancements in quantum and MEMS-based inertial navigation technologies | +0.9% | North America and Europe, pilot programs in Asia-Pacific | Long term (≥4 years) |

Use of commercial LEO-based PNT constellations to enhance navigation resilience | +0.6% | Global, early uptake in North America and Europe | Medium term (2-4 years) |

Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

The top five vendors held a prominent market share in the global market in 2024, indicating moderate concentration within the military navigation systems market. Northrop Grumman's LN-251 fiber-optic gyroscope dominates submarine and strategic-missile niches with 0.001°/h drift. Honeywell International Inc. leverages in-house MEMS fabrication to supply cost-effective HGuide units across more than 30 aircraft types, undercutting European rivals. Safran SA, Thales Group, and Collins Aerospace anchor European programs, while their software-defined offerings increasingly accept third-party sensor feeds.

Startups are reshaping value pools. Vector Atomic's cold-atom sensor removes drift entirely, but it must fall below USD 50,000 to reach scale. BAE Systems' NAVSOP demonstrates how terrestrial signals of opportunity can supplement GNSS, although global mapping remains a challenge. Xona's forthcoming LEO constellation promises encrypted PNT with interior and dense-city reach, while Q-CTRL licenses quantum-control firmware to incumbents, accelerating the diffusion of technology.

System integrators are pivoting from proprietary hardware to open-architecture software. Collins Aerospace's TruNet accepts heterogeneous sensor inputs on commercial processors, letting platform builders swap suppliers without redesigning avionics racks. White-space opportunities persist in anti-jam antennas and radar-hard chip supply, where specialized firms command premium margins despite lower absolute volumes.

Military Navigation Systems Industry Leaders* Northrop Grumman Corporation

* Safran SA

* Honeywell International Inc.

* Thales Group

* RTX Corporation

* *Disclaimer: Major Players sorted in no particular order

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Scope Methodology P Space

This market covers the revenue generated from military navigation systems used to determine position, navigation, and timing across defense platforms and missions, including hardware, software, and related services that enable navigation in normal and contested environments.

Scope exclusions: We exclude general consumer navigation devices and purely civilian navigation infrastructure unless the product is procured and configured for military use.

Segmentation Container

* By Platform* Air

* Land

* Sea

* Space

* Munitions and Missiles

* By Application* Command and Control (C2)

* Intelligence, Surveillance and Reconnaissance (ISR)

* Targeting and Guidance

* Search and Rescue (SAR)

* Others

* By Component* Hardware

- * Software
- * Services

- * By Geography* North America* United States
- * Canada
- * Mexico

- * Europe* United Kingdom
- * France
- * Germany
- * Italy
- * Spain
- * Rest of Europe

- * Asia-Pacific* China
- * India
- * Japan
- * South Korea
- * Rest of Asia-Pacific

- * South America* Brazil
- * Argentina
- * Rest of South America

- * Middle East and Africa* Middle East* United Arab Emirates
- * Saudi Arabia
- * Rest of Middle East

- * Africa* South Africa
- * Rest of Africa

Frequently Asked Questions

How large is the military navigation systems market in 2026?

It is valued at USD 12.97 billion and is forecasted to climb to USD 18.01 billion by 2031, reflecting a 6.79% CAGR.

Which platform type is expanding fastest?

Space-based navigation payloads are growing at a 7.44% CAGR due to atomic-clock and quantum-sensor adoption in new GPS III and Galileo satellites.

Why is Asia-Pacific demand accelerating?

Regional defense budgets are funding BeiDou, NavIC, and QZSS integration to cut dependence on US GPS, propelling a 7.62% CAGR in the region.

What technology trend is reshaping future procurements?

AI-enabled sensor fusion software that combines GNSS, inertial, and signals of opportunity is moving value toward the software segment, which is growing at an 7.78% CAGR.

How are export controls affecting vendor strategies?

ITAR and Wassenaar rules force companies to maintain separate civilian and military product lines, raising compliance costs and narrowing the buyer pool.