

# The Military GPS/GNSS Devices Market, 2009-2019

## 3.2 Steady Growth Across Military GPS/GNSS Devices Submarkets

Visiongain calculated that in 2008 the global GPS/GNSS devices market generated total sales of [REDACTED]. We expect that market to grow to [REDACTED] annually by the end of the forecast period in 2019 (Table 3.1, Figure 3.1). The compound annual growth rate (CAGR) in the period 2009-19 will be a moderate [REDACTED]%. CAGR will be highest in the period 2009-14, at [REDACTED]%, as countries move to equip their forces with those devices. Beyond 2014, CAGR will be low, at [REDACTED]%, as acquisitions taper off (Table 3.2). The total value of the market in 2008-19 is estimated to amount to [REDACTED].

The largest portion of the market in 2008 was taken up by the military GPS/GNSS devices for ground platforms, with [REDACTED]% ([REDACTED]) of the market. This was followed by GPS-aided guidance kits for munitions at [REDACTED]% ([REDACTED]). These in turn were followed by devices for aerial platforms at [REDACTED]% ([REDACTED]). Coming in last were those for naval platforms at only [REDACTED]% ([REDACTED]) (Table 3.3, Figures 3.3 to 3.5). Although there is demand across the board for GPS devices, those intended for ground platforms form the bulk, given the requirement for equipping soldiers deployed in overseas

**Table 3.3 Military GPS/GNSS Devices Sales Forecast by Submarket, 2009-19 (\$m, %)**

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
<b>Ground (\$m)</b>	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
Growth (%)		[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
<b>Aerial (\$m)</b>	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
Growth (%)		[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
<b>Naval (\$m)</b>	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
Growth (%)		[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
<b>Munitions (\$m)</b>	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
Growth (%)		[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
<b>Total (\$m)</b>	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
Growth (%)		[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

Source: visiongain 2009

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## 7 Key Companies Involved in Military GPS/GNSS Devices

This chapter profiles some of the major vendors in the military GPS/GNSS market. Given the complexity of the market, we offer the following profiles as a representative sample rather than an exhaustive one. In an emerging market, we have endeavoured to ensure that all information was accurate at the time when our research was undertaken.

### 7.1 BAE Systems Rokar

BAE Systems Rokar is a Jerusalem-based unit of BAE Systems that specialises in developing high-end GPS receivers for defence and commercial applications. The company offers GPS products for high dynamic platforms, satellite launchers, satellites, rolling platforms, INS-embedded boards, and integrated GPS and flight computer systems. It also provides custom GPS navigation solutions for unique customer requirements. BAE Systems Rokar's GPS products include SpaceNav, NavComp, Swift GPS Receiver, NAVPOD-NT, BP Rugged GPS, NT4RLG, and RBC-NT. Its GPS systems offer 12 to 48 channels along with one to four antenna inputs. It has customers in the US, Germany, India, Israel and other countries in Europe and Asia. The company, a fully-owned subsidiary of UK defence company BAE Systems, has approximately 100 employees.

### 7.2 Boeing

Boeing is leading the development of GPS IIF, an upgrade of the original GPS. GPS IIF will provide new capabilities such as full onboard encrypted military code, a new civil signal, crosslink enhancements and signal power increases. Boeing was contracted to build 12 GPS IIF satellites by the Navstar GPS Wing at the Space and Missile Systems Center, Los Angeles. The Boeing Weapons Enterprise Capability Center has, since 1998, produced more than 120,000 GPS-aided JDAM guidance kits for US and international customers.

Boeing is a US aerospace and defence company that reported revenues of ██████ in 2008. The company, whose corporate

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headquarters are located in Seattle, Washington, has more than 162,000 employees worldwide.

## 7.3 DRS Technologies

DRS Technologies is a company focused on defence technology. It supplies integrated products, services and support to military forces, intelligence agencies and related contractors worldwide. The company was bought by Finmeccanica in 2008 in a transaction reportedly valued at ██████████ DRS Technologies, headquartered in Parsippany, New Jersey, employs 5,800 people worldwide.

In May 2009, DRS acquired Soneticom, a digital and wireless communications system developer that provides global positioning technology for defence and homeland security programmes.

## 7.4 ITT Corporation

ITT Corporation is a major US defence contractor that provides communications, sensing and surveillance, space, and advanced engineering and integrated services for its government and commercial customers. According to ITT, it views the nature of the battlespace as having become more global, complex and increasingly asymmetrical and thus prioritises development of its defence products in such a context.

In the field of GPS, ITT describes itself as a "total GPS navigation systems provider". ITT's payloads have been part of every GPS satellite ever launched. The company has been designing, developing, integrating and manufacturing payloads for the US Air Force's Navstar GPS since 1974.

Its payloads have enabled the operational Block I, II, IIA and IIR satellites, and continues with the launch of the Block IIR-M satellites. ITT is also a major provider of subsystems for the upcoming GPS Block IIF payloads. ITT has partnered with fellow US defence company Lockheed Martin to develop a new generation of payloads with increased capabilities and security.