European
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European GNSS Agency (GSA) Releases New GNSS Market Report

The 2015 edition of the GSA's GNSS Market Report takes an in-depth look at market opportunities, technology trends and future developments for eight key market segments: Location-Based Services (LBS), Road Transportation, Aviation, Maritime, Rail, Agriculture, Surveying and, for the first time, Timing & Synchronisation.

With nearly 4 billion Global Navigation Satellite System (GNSS) enabled devices in use worldwide, and an estimated 7 billion by 2020 – or one device for every person on the planet – GNSS presents an unprecedented business opportunity for Europe. According to the 4th edition of the GSA GNSS Market Report, European GNSS – Galileo and EGNOS – is positioned to play a substantial role in boosting business, creating jobs and promoting innovation in Europe.

Six percent of European GDP depends on GNSS. In Europe, the GNSS market currently supports nearly 50,000 jobs in the downstream industry and 3,000 in the upstream. With the GNSS market expected to grow by 8.3% per year until 2019, these figures will only increase.

According to the report, smartphones are the most popular platform for accessing such Location-Based Services as point-of-interest search, location-based advertising, personal navigation and location-based social networking.

In terms of market performance, the report shows European industry being strongest in components manufacturing in the Road, Rail and Aviation segments. European companies are the global leader in Rail system integration and have a strong position in Maritime and Road.

GSA Executive Director Carlo des Dorides says: "With the volume of global data doubling every two years, we are living in exciting times and, as our Market Report demonstrates, location information matters now more than ever."

The full expanded 80-page report is available for download free of charge here:
http://www.gsa.europa.eu/market/market-report

About the European GNSS Agency

As an official European Union Regulatory Agency, the European GNSS Agency (GSA) manages public interests related to European GNSS programmes. The GSA's mission is to support European Union objectives and achieve the highest return on European GNSS investment, in terms of benefits to users and economic growth and competitiveness.

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Background & Key Findings

The 4th edition of the **GSA GNSS Market Report** provides a comprehensive source of knowledge on this dynamic global market. Considering that the Report has become a key reference for organisations building their GNSS market strategies, *this new edition provides:*

- Comprehensive updates on previous analyses
- New statistics of the GNSS receiver capabilities of the 31 top global manufacturers, offering in total more than 300 models
- Insights on the GNSS industry and regional shares of the GNSS market
- A more granular segmentation of the global GNSS market, namely: European Union (EU28); North America (incl. USA, Canada, Mexico); Asia-Pacific (incl. China, Japan, Australia, India, Republic of Korea); Non-EU28 Europe (incl. Norway, Switzerland, Russia, Ukraine); Middle-East and Africa (incl. Turkey, Israel, South Africa, UAE, Saudi Arabia); South America and Caribbean (incl. Brazil, Argentina, Colombia, Guatemala)
- Information on a new market segment: Timing and Synchronisation
- Plus, additional applications within existing segments (recreational navigation, fishing vessels, personal locator beacons, emergency locator transmitters, and digital tachograph)

Some top line insights from the 4th GSA GNSS Market Report:

- The global GNSS downstream market is forecasted to increase by 8.3% annually from 2013-2019, then slow down to 4.6% around 2023, growing on average faster (7%) than the forecasted global GDP in this period (6.6%).
- The installed base in the mature regions of EU28 and North America will grow steadily (8% p.a.) to 2023. The primary region of growth will be Asia-Pacific, which is forecasted to grow 11% p.a. from 1.7 bln in 2014 to 4.2 bln devices in 2023 – more than the EU and North America together. The Middle East and Africa will grow at the fastest rate (19% p.a.), but starting from a lower base.
- LBS and Road dominate cumulative GNSS revenues, driven by booming sales of smartphones and in-vehicle devices, location-aware applications and data services.
- With emerging economies catching up in terms of GNSS devices per capita, the ‘Digital Divide’ will narrow, driven by the take-up of smartphones. The growing dominance of Smartphones is foreseen (3.08 bln in 2014) as the most popular platform to access LBS.
- In the analysis of the capabilities of GNSS receivers and chipsets, it is reported that more than 60% of currently available receivers and chipsets supports as minimum 2 constellations with more than 20% supporting all 4 of them.

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The Report includes new infographics presenting:

- Global GNSS downstream market size – core and enabled (2013 to 2023)
- GNSS industry share by region (2012)
- The global shares of companies among components manufacturers, systems integrators and value-added service providers (2012)
- Capability of GNSS receivers and chipsets – all segments (2015)
- Supported constellation by receivers and chipsets – all segments (2015)
- Detailed analysis of key GNSS segments: LBS, Road, Aviation, Rail, Maritime, Agriculture, Surveying, Timing and Synchronisation, quantified in terms of:
  - Shipments of GNSS devices by application and region (2013 to 2023)
  - Installed base of GNSS devices by application and region (2013 to 2023)
  - Core revenues from GNSS device sales by application and region (2013 to 2023)
  - Capability of GNSS receivers and chipsets (2015)
  - Supported constellation by receivers and chipsets (2015)

Methodology

The GSA GNSS Market Report is compiled by the GSA and the European Commission and was produced using the GSA's systematic Marketing Monitoring and Forecasting Process.

The underlying market model uses advanced forecasting techniques applied to a wide range of input data, assumptions, and scenarios to forecast the size of the GNSS market in terms of shipments, revenue, and installed base of receivers.

Historical values are anchored to actual data in order to ensure a high level of accuracy. Assumptions are provided by expert opinions and model results are cross-checked against the most recent market research reports from independent sources, before being validated through an iterative consultation process with sector experts and stakeholders.

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