

Navigation Satellite System (GNSS)-Independent Positioning, Navigation, And Timing Constellation Market Trends 2025-2029

Navigation Satellite System (GNSS)-Independent Positioning, Navigation, And Timing Constellation Market Report 2025 – Market Size, Trends, Forecast 2025-2034

LONDON, GREATER LONDON, UNITED KINGDOM, September 30, 2025
/EINPresswire.com/ -- Global

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The market size of the independent positioning, navigation, and timing (PNT) constellation, which operates without the global navigation satellite system (GNSS), has seen rapid expansion

in recent years. Predicted growth shows it increasing from \$2.54 billion in 2024 to \$2.90 billion in 2025, boasting a compound annual growth rate (CAGR) of 14.2%. The remarkable growth during the historic period is credited to factors such as a growing dependence on reliable and resilient navigation systems, mounting concerns of global navigation satellite system (GNSS) jamming and spoofing, an escalating demand for accurate timing within critical infrastructures, a rise in its adoption within the defense and aerospace sectors, and an increasing requirement for backup solutions within the realms of transportation and

communications.

In the coming years, the size of the global navigation satellite system (GNSS)-independent positioning, navigation, and timing (PNT) constellation market is anticipated to witness a significant surge. It's projected to reach a value of \$4.87 billion in 2029, with a compound annual growth rate (CAGR) of 13.9%. The expansion in the forecast period is due to factors such as rising



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deployment of LEO-based PNT satellites, increased adoption of drones and autonomous vehicles, escalating demand for durable navigation in maritime and urban environments, growing necessity for uninterrupted timing and synchronization solutions, and heightened investments in GNSS-independent systems by the government and defense sectors. The forecast period is expected to see key trends including advancements in MEO and LEO satellite technologies, innovation in inertial and quantum navigation systems, integration of GNSS-independent PNT with internet of things (IoT) and artificial intelligence (AI) platforms, progression in resilient timing and synchronization solutions, and advancements in pseudolite networks and eLORAN.

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What Are Key Factors Driving The Demand In The Global Navigation Satellite System (GNSS)-Independent Positioning, Navigation, And Timing (PNT) Constellation Market?

The growth of the global navigation satellite system (GNSS)-independent positioning, navigation, and timing (PNT) constellation market is projected to be driven by the escalating occurrences of cyber threats. Cyber threats entail harmful actions such as hacking, spoofing, data meddling, or denial-of-service (DoS) attacks, specifically targeting positioning, navigation, and timing systems. An increasing reliance on digital networks and key infrastructure has resulted in a rise in cyber threats, highlighting the necessity for secure and resistant positioning solutions. GNSS-independent PNT systems offer a solution to these cyber threats by providing dependable navigation and timing, even when conventional GNSS signals are interfered with or manipulated in any way. For example, as per the Australian Signals Directorate, a governmental agency in Australia, the country saw a significant increase in cyber threats during 2022–23, with approximately 94,000 reports of cybercrime filed, showing a 23% rise from the previous year. The cost of cybercrime to businesses also increased by 14% compared to the last financial year. Hence, the escalating occurrences of cyber threats are fueling the growth of the global navigation satellite system (GNSS)-independent positioning, navigation, and timing (PNT) constellation market.

Who Are The Leading Players In The Global Navigation Satellite System (GNSS)-Independent Positioning, Navigation, And Timing (PNT) Constellation Market?

Major players in the Global Navigation Satellite System (GNSS)-Independent Positioning, Navigation, And Timing (PNT) Constellation Global Market Report 2025 include:

- RTX Corporation
- General Dynamics Corporation
- Honeywell International Inc.
- BAE Systems Plc
- Safran S.A.
- Thales S.A.
- Equinix Inc.

- Trimble Inc.
- Adtran Inc.
- Iridium Communications Inc.

What Are The Key Trends Shaping The Global Navigation Satellite System (GNSS)-Independent Positioning, Navigation, And Timing (PNT) Constellation Industry?

Prominent corporations in the worldwide market for GNSS-independent positioning, navigation, and timing (PNT) constellation are directing their efforts towards the development of sophisticated solutions like positioning, navigation, and timing (PNT) microsatellites. These solutions aim to improve these capabilities for an extensive range of applications. PNT microsatellites offer compact and affordable satellites engineered to give precise location and timing specifics, particularly when conventional GNSS signals are feeble or unavailable. For instance, TrustPoint, an American company specializing in global positioning system (GPS) technology, launched its PNT Microsatellite Constellation in April 2023. These particular microsatellites have distinct features like high-accuracy positioning, rapid signal transmission, and resistance to signal interference, making them perfect for defense, autonomous vehicles, and monitoring of critical infrastructures. With a design carefully tailored for adaptability, the microsatellites can be swiftly deployed and incorporated with existing systems. They provide dependable, independent, and uninterrupted positioning, navigation, and timing (PNT) services in a variety of operational settings.

Analysis Of Major Segments Driving The Global Navigation Satellite System (GNSS)-Independent Positioning, Navigation, And Timing (PNT) Constellation Market Growth

The global navigation satellite system (GNSS)-independent positioning, navigation, and timing (PNT) constellation market covered in this report is segmented

- 1) By Technology: Terrestrial, Space-Based, Quantum, Inertial, Other Technologies
- 2) By Platform: Ground, Airborne, Naval, Space
- 3) By Application: Defense, Aviation, Maritime, Automotive, Critical Infrastructure, Other Applications
- 4) By End-User: Government, Commercial, Military, Other End-Users

Subsegments:

- 1) By Terrestrial: Long Range Navigation, Enhanced Long Range Navigation, Ground-Based Radio Navigation Systems, Pseudolite Systems
- 2) By Space-Based: Low Earth Orbit (LEO) Satellites, Medium Earth Orbit (MEO) Satellites, Geostationary Earth Orbit (GEO) Satellites, Hybrid Satellite Systems
- 3) By Quantum: Quantum Accelerometers, Quantum Gyroscopes, Quantum Gravimeters
- 4) By Inertial: Strapdown Inertial Navigation Systems (SINS), Ring Laser Gyroscope (RLG) Systems, Fiber Optic Gyroscope (FOG) Systems, Micro-Electro-Mechanical Systems (MEMS) Inertial Navigation System (INS)
- 5) By Other Technologies: Visual Odometry Systems, Magnetic-Based Navigation Systems, Acoustic-Based Navigation Systems, Hybrid Multi-Sensor Systems

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Which Region Is Expected To Lead The Global Navigation Satellite System (GNSS)-Independent Positioning, Navigation, And Timing (PNT) Constellation Market By 2025?

In the Global Navigation Satellite System (GNSS)-Independent Positioning, Navigation, And Timing (PNT) Constellation Global Market Report 2025, North America was recognized as the leading region for 2024. In the ensuing period, the region with the most rapid growth projection is Asia-Pacific. The regions detailed in the report include North America, Western Europe, Eastern Europe, Asia-Pacific, South America, Middle East, and Africa.

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