

CHAPTER ONE: INTRODUCTION.....	1
STUDY BACKGROUND	1
STUDY GOALS AND OBJECTIVES.....	1
INTENDED AUDIENCE.....	2
SCOPE AND FORMAT	2
METHODOLOGY AND INFORMATION SOURCES.....	3
ANALYST CREDENTIALS.....	3
RELATED BCC RESEARCH REPORTS.....	3
BCC ONLINE SERVICES.....	4
DISCLAIMER	4
 CHAPTER TWO: EXECUTIVE SUMMARY.....	 5
<i>SUMMARY TABLE GLOBAL MARKET PROJECTIONS FOR MOBILE LOCATION TECHNOLOGIES BY APPLICATION, THROUGH 2016 (\$ MILLIONS)</i>	 5
<i>SUMMARY FIGURE GLOBAL MARKET SHARE PROJECTIONS FOR MOBILE LOCATION TECHNOLOGIES BY APPLICATION, 2010- 2016 (%)</i>	 6
EXECUTIVE SUMMARY (CONTINUED).....	7
 CHAPTER THREE: OVERVIEW	 8
GENERAL INTRODUCTION TO MOBILE LOCATION TECHNOLOGIES.....	 8
SYSTEM COMPONENTS	8
INFRASTRUCTURE COMPONENT.....	9
CONTROL COMPONENT.....	9
END-USER COMPONENT	9
HISTORY	9
HISTORY (CONTINUED)	10
MOBILE LOCATION TECHNOLOGIES.....	11
<i>TABLE 1 MAJOR MOBILE LOCATION TECHNOLOGY TYPES</i>	11
SATELLITE-ONLY LOCATION TECHNOLOGIES.....	12
<i>TABLE 2 SATELLITE-BASED POSITIONING SYSTEM COMPARISON</i>	12
GLOBAL POSITIONING SYSTEM (GPS).....	12
Global Positioning System ... (Continued)	13
GLONASS.....	14
GALILEO.....	14
HYBRID/AUGMENTED SATELLITE TECHNOLOGIES.....	15
<i>TABLE 3 HYBRID/AUGMENTED SATELLITE LOCATION-FINDING TECHNOLOGIES</i>	 15
<i>TABLE 3 (CONTINUED)</i>	16
DIFFERENTIAL GPS (DGPS)	17
WIDE AREA AUGMENTATION SYSTEM (WAAS).....	17
LOCAL AREA AUGMENTATION SYSTEM (LAAS).....	18

NATIONWIDE DIFFERENTIAL GLOBAL POSITIONING SYSTEM (NDGPS)	19
HIGH ACCURACY-NATIONWIDE DIFFERENTIAL GLOBAL POSITIONING SYSTEM (HA-NDGPS)	20
CONTINUOUSLY OPERATING REFERENCE STATIONS (CORS).....	21
ONLINE POSITIONING USER SERVICE (OPUS).....	22
GPS/INERTIAL NAVIGATION SYSTEM (GPS/INS).....	22
GPS/PSEUDOLITES (GPS/PL)	23
WIRELESS-ASSISTED GPS (WA-GPS).....	23
NETWORK-BASED LOCATION TECHNOLOGIES.....	24
<i>TABLE 4 NETWORK-BASED MOBILE LOCATION TECHNOLOGIES</i>	<i>24</i>
Cell-ID (CID).....	25
Angle of Arrival (AOA)	25
Location Pattern Matching (LPM).....	25
Time Difference of Arrival (TDOA).....	26
SIM Application Toolkit (SAT).....	26
Radio Frequency (RF) Indoor Positioning Systems	26
WLAN Indoor Positioning Systems.....	26
Other Radio Frequency Indoor Location Systems.....	27
APPLICATION SEGMENTS	28
<i>TABLE 5 MOBILE LOCATION TECHNOLOGY APPLICATIONS.....</i>	<i>28</i>
AVIATION	28
Requirements and Challenges	29
Accuracy	29
<i>TABLE 6 FAA TRANSITION STRATEGY NAVIGATION PERFORMANCE REQUIREMENTS (REQUIRED ACCURACY IN 95% OF ALL OPERATIONS).....</i>	<i>30</i>
Airworthiness	30
Solutions and Technologies	31
<i>TABLE 7 AVIATION-RELATED MOBILE LOCATION SOLUTIONS</i>	<i>32</i>
Solution Providers	32
<i>TABLE 8 AVIATION-RELATED POSITIONING SOLUTION PROVIDERS</i>	<i>32</i>
<i>FIGURE 1 COMPANY SHARES OF GLOBAL AVIATION GPS MARKET, 2010 (%).....</i>	<i>33</i>
VEHICLE NAVIGATION AND LOCATION	34
Requirements and Challenges	34
Accuracy	34
Low Cost.....	34
Terrain and Building Obstructions.....	35
Usability	35
Solutions and Technologies	35
Integrated GPS and INS	35

Solution Providers	35
<i>TABLE 9 VEHICLE NAVIGATION SOLUTION PROVIDERS</i>	36
<i>FIGURE 2 COMPANY SHARES OF GLOBAL VEHICLE NAVIGATION</i>	
<i>SYSTEMS MARKET, 2010 (%)</i>	36
<i>FIGURE 2 (CONTINNUED)</i>	37
MACHINE CONTROL.....	37
Requirements and Challenges	37
Technologies and Solutions	38
GPS Base Stations for Maximum Accuracy.....	38
Combined GPS/Laser Guidance	38
Solution Providers	38
<i>TABLE 10 MACHINE-CONTROLLED SOLUTION PROVIDERS</i>	38
<i>FIGURE 3 COMPANY SHARES OF MACHINE-CONTROLLED GPS</i>	
<i>MARKET, 2010 (%)</i>	39
<i>FIGURE 3 (CONTINUED)</i>	40
MARINE	40
Requirements and Challenges	40
Technologies and Solutions	40
Solution Providers	40
<i>TABLE 11 MARINE GPS SOLUTION PROVIDERS</i>	41
<i>FIGURE 4 COMPANY MARKET SHARES OF GLOBAL MARINE GPS</i>	
<i>NAVIGATION MARKET, 2010 (%)</i>	42
MILITARY	42
Requirements and Challenges	43
Flexible Targeting.....	44
Spoofing and Jamming	44
Electromagnetic Pulse (EMP)	44
Technologies and Solutions	45
Flexible Targeting Systems.....	45
Antispoofing/Antijamming Technology.....	45
New Handheld GPS Receiver	46
Solution Providers	46
<i>TABLE 12 MILITARY SOLUTION PROVIDERS</i>	46
PEOPLE AND ANIMAL TRACKING	46
Location-Based Commerce	47
Requirements and Challenges	47
Coverage Area	48
Compliance.....	48
Privacy Issues	48
Technologies and Solutions	49
Continuous Coverage.....	49
Small Size.....	50
Features Designed to Encourage Compliance and	
Discourage Abuse	50

Passive Tracking Capability.....	51
Geofencing.....	51
Web Functionality.....	51
Technologies to Protect Users' Privacy Rights	51
Solution Providers	52
<i>TABLE 13 PEOPLE AND ANIMAL TRACKING SOLUTION PROVIDERS</i>	<i>52</i>
<i>FIGURE 5 COMPANY MARKET SHARES OF GLOBAL NON-MOBILE PHONE-BASED PERSONNEL AND ANIMAL TRACKING DEVICE MARKET, 2010 (%).....</i>	<i>53</i>
RECREATION.....	54
Requirements and Challenges	54
Technologies and Solutions	54
Solution Providers	55
<i>TABLE 14 RECREATIONAL GPS SOLUTION PROVIDERS.....</i>	<i>55</i>
<i>FIGURE 6 COMPANY MARKET SHARES OF GLOBAL RECREATIONAL GPS DEVICE MARKET, 2010 (%).....</i>	<i>56</i>
SURVEYING/MAPPING	56
Requirements and Challenges	56
Technologies and Solutions	57
Ergonomics.....	57
Operations in Forested and Urban Areas.....	58
Mobile Mapping Software.....	58
Other Developments	58
Solution Providers	58
<i>TABLE 15 MAPPING AND SURVEYING SOLUTION PROVIDERS.....</i>	<i>59</i>
<i>FIGURE 7 COMPANY SHARES OF GLOBAL MAPPING AND SURVEYING GPS DEVICE MARKET, 2010 (%)</i>	<i>59</i>
<i>FIGURE 7 (CONTINUED)</i>	<i>60</i>
ASSET MANAGEMENT.....	60
Requirements and Challenges	61
Technologies and Solutions	61
Multiple Functions.....	61
Assisted GPS.....	62
Satellite Communications Uplink.....	62
Advanced Batteries.....	62
Solution Providers	62
<i>TABLE 16 ASSET MANAGEMENT SOLUTION PROVIDERS.....</i>	<i>62</i>
<i>TABLE 16 (CONTINUED).....</i>	<i>63</i>
<i>FIGURE 8 COMPANY SHARES OF THE GLOBAL GPS-BASED ASSET MANAGEMENT MARKET, 2010 (%).....</i>	<i>64</i>
PATENT ANALYSIS	64
INFRASTRUCTURE AND CONTROL VERSUS END-USER APPLICATIONS	65

<i>FIGURE 9 U.S. PATENTS FOR MOBILE LOCATION TECHNOLOGIES ISSUED SINCE 1976 (PERCENTAGE OF TOTAL PATENTS)</i>	65
TREND IN ANNUAL NUMBER OF PATENTS ISSUED	66
<i>FIGURE 10 U.S. PATENTS ISSUED ANNUALLY FOR MOBILE POSITIONING END-USER TECHNOLOGIES, 2000–2010 (NO. OF PATENTS)</i>	66
PATENTS BY TECHNOLOGY TYPE.....	66
<i>FIGURE 11 U.S. PATENTS ISSUED SINCE 1976 FOR MOBILE LOCATION END-USER TECHNOLOGIES BY TECHNOLOGY TYPE (% OF TOTAL PATENTS)</i>	67
PATENTS BY APPLICATION AREA	68
<i>FIGURE 12 U.S. PATENTS ISSUED SINCE 1976 FOR MOBILE LOCATION END-USER SOLUTIONS BY APPLICATION TYPE (% OF TOTAL PATENTS)</i>	68
MAJOR PATENT HOLDERS.....	68
<i>FIGURE 13 MAJOR PATENT HOLDERS/ASSIGNEES' SHARES OF TOTAL U.S. POSITIONING PATENTS ISSUED, SINCE 1976 (% OF TOTAL PATENTS)</i>	69
 CHAPTER FOUR: GLOBAL MARKETS FOR MOBILE LOCATION	
APPLICATIONS.....	70
SUMMARY.....	70
TOTAL SALES OF MOBILE POSITIONING SYSTEMS.....	70
<i>TABLE 17 GLOBAL MARKET PROJECTIONS FOR MOBILE LOCATION TECHNOLOGY BY APPLICATION, THROUGH 2016 (\$ MILLIONS)</i>	70
<i>FIGURE 14 PROJECTED GLOBAL MARKET TRENDS IN MOBILE-LOCATION TECHNOLOGIES, 2010-2016 (\$ MILLIONS)</i>	71
Sales of Mobile Location Technologies by Application Segment	71
<i>FIGURE 15 GLOBAL MOBILE LOCATION TECHNOLOGY MARKET SHARES BY APPLICATION, 2010 VS. 2016 (%)</i>	72
<i>FIGURE 15 (CONTINUED)</i>	73
Sales by Form of Product Purchased	73
<i>FIGURE 16 GLOBAL MOBILE LOCATION TECHNOLOGIES MARKET SHARES BY DISCRETE COMPONENT AND COMPLETE SOLUTION, 2010 (%)</i>	74
Sales by Region.....	74
<i>TABLE 18 GLOBAL MARKET PROJECTIONS FOR MOBILE LOCATION TECHNOLOGY BY GEOGRAPHICAL MARKET, THROUGH 2016 (\$ MILLIONS)</i>	75
<i>FIGURE 17 GLOBAL MARKET SHARES OF MOBILE LOCATION TECHNOLOGIES BY REGION, 2010 VS. 2016 (%)</i>	75
<i>FIGURE 17 CONTINUED</i>	76
AVIATION (EXCLUDING MILITARY AIRCRAFT).....	77

<i>FIGURE 18 GLOBAL MARKET SHARES OF GENERAL VS COMMERCIAL CIVIL AVIATION GPS DEVICES, 2010 (\$ MILLIONS/%)</i>	77
<i>FIGURE 19 GLOBAL MARKET FOR OEM VS RETROFIT CIVIL AVIATION GPS DEVICES, 2010 (\$ MILLIONS)</i>	78
<i>MARKET DRIVERS</i>	79
General Aviation.....	79
General Aviation Aircraft Shipments	79
<i>TABLE 19 GLOBAL SHIPMENTS OF GENERAL AVIATION AIRCRAFT, 1996–2006 (UNITS)</i>	79
<i>FIGURE 20 TRENDS IN GLOBAL SHIPMENTS OF GENERAL AVIATION AIRCRAFT, 2001–2010 (UNITS)</i>	80
<i>FIGURE 21 PROJECTED GLOBAL SHIPMENTS OF GENERAL AVIATION AIRCRAFT, 2010-2016 (UNITS)</i>	81
General Aviation GPS Retrofits	81
<i>FIGURE 22 PROJECTED SIZE OF GLOBAL GENERAL AVIATION AIRCRAFT FLEET, 2010 2016 (UNITS AT YEAR-END)</i>	82
<i>TABLE 20 GLOBAL MARKET PROJECTIONS FOR GENERAL AVIATION FLEET GPS RETROFITS, THROUGH 2016 (UNITS)</i>	83
<i>FIGURE 23 PROJECTED TRENDS IN GLOBAL GENERAL AVIATION FLEET GPS RETROFITS, 2011-2016 (UNITS)</i>	83
Commercial Air Transport	83
Commercial Aircraft Shipments.....	83
<i>TABLE 21 PROJECTED GLOBAL SHIPMENTS OF COMMERCIAL AIRCRAFT, 2011-2016 (UNITS)</i>	84
<i>FIGURE 24 PROJECTED TRENDS IN GLOBAL SHIPMENTS OF COMMERCIAL AIRCRAFT, 2010-2016 (UNITS)</i>	84
Commercial Avionics Retrofits	84
Projected Sales.....	85
<i>TABLE 22 GLOBAL MARKET PROJECTIONS OF OEM AND RETROFIT GPS DEVICES FOR COMMERCIAL AND GENERAL CIVIL AVIATION, THROUGH 2016 (\$ MILLIONS)</i>	85
VEHICLE NAVIGATION AND LOCATION	86
<i>FIGURE 25 GLOBAL MARKET SHARES OF IN-DASHBOARD VS PORTABLE GPS VEHICLE NAVIGATION SYSTEMS, 2010 (%)</i>	86
Market Drivers	87
New Vehicle Sales.....	87
<i>TABLE 23 GLOBAL SALES OF NEW PASSENGER CARS, THROUGH 2016 (MILLION UNITS)</i>	87
Market Penetration of In-Dashboard Navigation Systems	87
<i>TABLE 24 GLOBAL PENETRATION OF IN-DASH GPS NAVIGATION SYSTEMS, THROUGH 2016 (UNITS PER THOUSAND PASSENGER CARS SOLD)</i>	88

Sales of Portable Vehicle Navigation Systems	88
<i>TABLE 25 GLOBAL MARKET PROJECTIONS FOR STAND-ALONE VEHICLE NAVIGATION SYSTEMS, THROUGH 2016 (MILLION UNITS)</i>	88
Growing Use of Mobile Phones for Vehicle Navigation.....	88
Price Trends	89
<i>FIGURE 26 PROJECTED AVERAGE PRICE TRENDS FOR IN-DASHBOARD VS STAND-ALONE GPS NAVIGATION SYSTEMS, THROUGH 2016 (\$/UNIT)</i>	89
Projected Sales.....	90
<i>TABLE 26 SUMMARY OF GLOBAL MARKET FOR GPS VEHICLE NAVIGATION SYSTEMS, THROUGH 2016</i>	90
PEOPLE AND ANIMAL TRACKING	90
<i>FIGURE 27 GLOBAL MOBILE LOCATION TECHNOLOGY-ENABLED PEOPLE AND ANIMAL TRACKING DEVICES MARKET SHARES BY TYPE, 2010 (%)</i>	91
<i>FIGURE 28 GLOBAL MOBILE LOCATION TECHNOLOGY-ENABLED NON-MOBILE PHONE PERSONNEL AND ANIMAL TRACKING MARKET SHARES, 2010 (%)</i>	92
Market Drivers	93
Mobile Handset Shipments	93
Mobile Location Enabled Handset Market Penetration	93
Cost of Mobile Phone GPS Chipsets.....	93
<i>TABLE 27 GLOBAL MARKET PROJECTION OF AVERAGE COST OF MOBILE PHONE GPS CHIPSETS, THROUGH 2016 (\$ PER UNIT)</i>	93
People/Animals with Tracking Requirements	93
Projected Sales.....	94
<i>TABLE 28 GLOBAL MARKET PROJECTIONS FOR MOBILE LOCATION TECHNOLOGY-ENABLED PEOPLE AND ANIMAL TRACKING DEVICE BY REGION, THROUGH 2016 (\$ MILLIONS)</i>	95
MACHINE CONTROL.....	95
<i>FIGURE 29 GLOBAL MARKET SHARES OF GPS MACHINE CONTROL SYSTEMS BY END-USER SEGMENT, 2010 (%)</i>	96
Market Drivers	96
Earthmoving Equipment Sales	97
<i>FIGURE 30 GLOBAL SHIPMENTS OF EARTHMOVING EQUIPMENT, PROJECTED 2010-2016 (UNITS)</i>	97
Growing Penetration of the Earthmoving Equipment Market	98
Growth of Other Markets for GPS Machine Control Systems	98
Projected Sales.....	98

<i>TABLE 29 GLOBAL MARKET PROJECTIONS FOR GPS MACHINE CONTROL SYSTEMS, THROUGH 2016 (\$ MILLIONS)</i>	98
MARINE	99
<i>FIGURE 31 COMMERCIAL VS RECREATIONAL GPS MARINE NAVIGATION SYSTEM MARKET SHARES, 2010 (%)</i>	99
Market Drivers	100
Shipments of New Vessels.....	100
Commercial Vessels	100
<i>TABLE 30 WORLDWIDE COMMERCIAL SHIPBUILDING, THROUGH 2009 (NUMBER OF SHIPS COMPLETED)</i>	100
<i>FIGURE 32 WORLDWIDE COMMERCIAL SHIPBUILDING TRENDS, 2000–2009 (NUMBER OF SHIPS COMPLETED)</i>	101
Recreational Vessels	101
<i>TABLE 31 U.S. POWERED RECREATIONAL BOATS: NUMBER OF BOATS COMPLETED, THROUGH 2010 (THOUSANDS)</i>	102
<i>FIGURE 33 TRENDS IN U.S. POWERED RECREATIONAL BOAT SALES, 2000–2010 (NO. OF BOATS SOLD)</i>	102
Retrofits.....	103
Projected Sales.....	103
<i>TABLE 32 GLOBAL MARKET PROJECTION FOR MARINE GPS MARINE NAVIGATION SYSTEMS, THROUGH 2016 (\$ MILLIONS)</i>	103
MILITARY	103
<i>TABLE 33 GLOBAL MILITARY EXPENDITURES ON MOBILE LOCATION DEVICES, THROUGH 2010 (\$ MILLIONS)</i>	104
<i>FIGURE 34 HISTORICAL TRENDS IN MILITARY EXPENDITURES ON MOBILE LOCATION DEVICES, 1998–2010 (\$ MILLIONS)</i>	104
Market Drivers	104
U.S. Military Procurement Budgets.....	104
<i>FIGURE 35 PROJECTED U.S. MILITARY PROCUREMENT BUDGET TRENDS, 2010-2016 (\$ BILLIONS)</i>	105
Projected Market	106
<i>TABLE 34 GLOBAL MARKET PROJECTION FOR MILITARY GPS RECEIVERS, THROUGH 2016 (\$ MILLIONS)</i>	106
RECREATION.....	106
Market Drivers	106
Number of People Participating in Outdoor Recreation Activities	106
<i>FIGURE 36 TRENDS IN U.S. OUTDOOR RECREATION PARTICIPATION: TOTAL AND ENTHUSIAST, 2000–2010 (MILLION PEOPLE)</i>	107
Recreational GPS Market Penetration	107
Projected Sales.....	108
<i>TABLE 35 GLOBAL MARKET PROJECTION FOR RECREATIONAL GPS RECEIVERS, THROUGH 2016 (\$ MILLIONS)</i>	108

SURVEYING/MAPPING	108
Market Drivers	108
User Base	109
Market Saturation	109
Projected Sales.....	109
<i>TABLE 36 GLOBAL MARKET PROJECTION FOR SURVEYING AND</i>	
<i>MAPPING GPS RECEIVERS, THROUGH 2016 (\$ MILLIONS)</i>	110
ASSET MANAGEMENT.....	110
<i>FIGURE 37 GLOBAL MARKET SHARES OF MOBILE ASSET</i>	
<i>MANAGEMENT SYSTEMS BY END-USER SEGMENT, 2010 (%)</i>	110
<i>FIGURE 37 (CONTINUED)</i>	111
Market Drivers	111
Automatic Vehicle Location (AVL) Systems.....	111
Unpowered Mobile Asset Management Devices.....	112
Projected Sales.....	112
<i>TABLE 37 GLOBAL MARKET PROJECTIONS FOR GPS ASSET</i>	
<i>TRACKING DEVICES BY SEGMENT, THROUGH 2016 (\$</i>	
<i>MILLIONS)</i>	113
CHAPTER FIVE: U.S. AND CANADIAN MARKETS.....	114
SUMMARY.....	114
<i>TABLE 38 U.S. /CANADIAN MARKET FOR MOBILE LOCATION</i>	
<i>TECHNOLOGY BY APPLICATION, THROUGH 2016 (\$ MILLIONS)</i>	114
<i>TABLE 39 U.S. /CANADIAN MARKET FOR MOBILE LOCATION</i>	
<i>TECHNOLOGY BY COUNTRY, THROUGH 2016 (\$ MILLIONS)</i>	115
AVIATION.....	115
<i>TABLE 40 U.S. AND CANADIAN MARKETS FOR CIVIL AVIATION</i>	
<i>GPS DEVICES, THROUGH 2016 (\$ MILLIONS)</i>	115
<i>FIGURE 38 U.S. AND CANADIAN PRODUCTION OF NON-MILITARY</i>	
<i>AIRCRAFT, 2010 (%)</i>	116
<i>TABLE 41 U.S. AND CANADIAN MARKETS FOR CIVIL AVIATION</i>	
<i>GPS DEVICES THROUGH 2016 (\$ MILLIONS)</i>	117
<i>FIGURE 39 U.S. AND CANADIAN NON-MILITARY AIRCRAFT</i>	
<i>FLEETS, 2010 (%)</i>	117
<i>FIGURE 39 (CONTINUED)</i>	118
<i>TABLE 42 US AND CANADIAN RETROFIT MARKETS FOR CIVIL</i>	
<i>AVIATION GPS DEVICES, THROUGH 2016 (\$ MILLIONS)</i>	119
MOTOR VEHICLES	119
<i>TABLE 43 U.S. AND CANADIAN MARKETS FOR MOTOR VEHICLE</i>	
<i>NAVIGATION DEVICES, THROUGH 2016 (\$ MILLIONS)</i>	119
<i>TABLE 44 U.S. AND CANADIAN AUTOMOBILE PRODUCTION, 2010–</i>	
<i>2016 (%)</i>	120
<i>TABLE 45 U.S. AND CANADIAN MARKET, THROUGH 2016 (\$</i>	
<i>MILLIONS)</i>	120
<i>TABLE 45 (CONTINUED)</i>	121

PEOPLE AND ANIMAL TRACKING.....	121
TABLE 46 U.S./CANADIAN MARKET FOR MOBILE LOCATION TECHNOLOGY-ENABLED PEOPLE AND ANIMAL TRACKING DEVICE BY REGION, THROUGH 2016 (\$ MILLIONS).....	122
MACHINE CONTROL.....	122
TABLE 47 U.S./CANADIAN EXPENDITURES ON GPS MACHINE CONTROL SYSTEMS, THROUGH 2016 (\$ MILLIONS).....	123
MARINE.....	123
TABLE 48 U.S. AND CANADIAN MARKETS FOR MARINE GPS DEVICES, THROUGH 2016 (\$ MILLIONS).....	124
MILITARY.....	124
TABLE 49 U.S./CANADIAN EXPENDITURES ON MILITARY APPLICATIONS OF MOBILE LOCATION TECHNOLOGY, THROUGH 2016 (\$ MILLIONS).....	125
RECREATION	125
TABLE 50 U.S./CANADIAN EXPENDITURES ON RECREATIONAL GPS RECEIVERS, THROUGH 2016 (\$ MILLIONS).....	125
SURVEYING AND MAPPING.....	125
TABLE 51 U.S./CANADIAN EXPENDITURES ON GPS SURVEYING AND MAPPING EQUIPMENT, THROUGH 2016 (\$ MILLIONS).....	126
ASSET MANAGEMENT	126
TABLE 52 U.S./CANADIAN PROJECTIONS FOR GPS ASSET TRACKING DEVICES BY SEGMENT, THROUGH 2016 (\$ MILLIONS).....	126
CHAPTER SIX: EUROPEAN MARKETS	127
SUMMARY.....	127
TABLE 53 EUROPEAN MARKET FOR MOBILE LOCATION TECHNOLOGIES BY APPLICATION, THROUGH 2016 (\$ MILLIONS).....	127
TABLE 54 EUROPEAN MARKET FOR MOBILE LOCATION TECHNOLOGIES BY COUNTRY, THROUGH 2016 (\$ MILLIONS).....	128
AVIATION SEGMENT.....	128
TABLE 55 EUROPEAN MARKETS FOR CIVIL AVIATION GPS DEVICES, THROUGH 2016 (\$ MILLIONS).....	128
FIGURE 40 EUROPEAN CIVIL AVIATION GPS MARKET COUNTRY SHARES, 2010 VS. 2016 (%).....	129
FIGURE 41 EUROPEAN PRODUCTION OF NON-MILITARY AIRCRAFT, 2010 (%).....	130
TABLE 56 EUROPEAN OEM MARKETS FOR CIVIL AVIATION GPS DEVICES, THROUGH 2016 (\$ MILLIONS).....	131
FIGURE 42 EUROPEAN NON-MILITARY AIRCRAFT FLEETS, 2010 (%).....	132
TABLE 57 EUROPEAN RETROFIT MARKETS FOR CIVIL AVIATION GPS DEVICES, THROUGH 2016 (\$ MILLIONS).....	133

MOTOR VEHICLES	133
TABLE 58 EUROPEAN MARKETS FOR MOTOR VEHICLE NAVIGATION DEVICES, THROUGH 2016 (\$ MILLIONS)	134
FIGURE 43 EUROPEAN MARKETS FOR MOTOR VEHICLE NAVIGATION DEVICES, COUNTRY SHARES, 2010-2016 (%).....	134
FIGURE 43 (CONTINUED)	135
TABLE 59 EUROPEAN AUTOMOBILE PRODUCTION, 2010–2016 (MILLION UNITS/% OF TOTAL GLOBAL PRODUCTION)	135
TABLE 60 EUROPEAN SHARES OF GLOBAL MARKET FOR PORTABLE GPS VEHICLE NAVIGATION SYSTEMS, 2010 (%).....	136
TABLE 61 EUROPEAN MARKET FOR GPS VEHICLE NAVIGATION SYSTEMS, THROUGH 2016	136
TABLE 61 (CONTINUED).....	137
PEOPLE AND ANIMAL TRACKING.....	137
TABLE 62 EUROPEAN MARKET FOR MOBILE LOCATION TECHNOLOGY-ENABLED PEOPLE AND ANIMAL TRACKING DEVICE BY REGION, THROUGH 2016 (\$ MILLIONS).....	138
MACHINE CONTROL.....	139
FIGURE 44 (%) EUROPEAN MARKET FOR CONSTRUCTION EQUIPMENT, 2010 (% OF TOTAL GLOBAL EXPENDITURES)	139
TABLE 63 EUROPEAN EXPENDITURES ON GPS MACHINE CONTROL, THROUGH 2016 (\$ MILLIONS).....	140
MARINE	140
TABLE 64 EUROPEAN MARKETS FOR MARINE GPS DEVICES, THROUGH 2016 (\$ MILLIONS).....	141
MILITARY.....	141
TABLE 65 EUROPEAN EXPENDITURES ON MILITARY APPLICATIONS OF MOBILE LOCATION TECHNOLOGY, THROUGH 2016 (\$ MILLIONS).....	142
RECREATION	142
FIGURE 45 EUROPEAN EXPENDITURES ON SPORTS AND RECREATION EQUIPMENT, 2010 (% OF TOTAL GLOBAL EXPENDITURES).....	143
TABLE 66 EUROPEAN EXPENDITURES ON RECREATIONAL GPS RECEIVERS, THROUGH 2016 (\$ MILLIONS).....	144
SURVEYING AND MAPPING.....	144
TABLE 67 EUROPEAN EXPENDITURES ON GPS SURVEYING AND MAPPING EQUIPMENT, THROUGH 2016 (\$ MILLIONS)	144
ASSET MANAGEMENT	145
TABLE 68 EUROPEAN EXPENDITURES ON GPS ASSET MANAGEMENT APPLICATIONS, THROUGH 2016 (\$ MILLIONS)	145
CHAPTER SEVEN: ASIA-PACIFIC MARKETS	146
SUMMARY.....	146

<i>TABLE 69 ASIA-PACIFIC MARKET FOR MOBILE LOCATION TECHNOLOGIES BY APPLICATION, THROUGH 2016 (\$ MILLIONS)</i>	146
<i>TABLE 70 ASIA-PACIFIC MARKET FOR MOBILE LOCATION TECHNOLOGIES BY COUNTRY, THROUGH 2016 (\$ MILLIONS)</i>	147
<i>AVIATION SEGMENT</i>	147
<i>TABLE 71 ASIA-PACIFIC MARKETS FOR CIVIL AVIATION GPS DEVICES, THROUGH 2016 (\$ MILLIONS)</i>	147
<i>FIGURE 46 ASIA-PACIFIC CIVIL AVIATION GPS MARKET COUNTRY SHARES, 2010 VS. 2016 (%)</i>	148
<i>FIGURE 47 ASIA-PACIFIC NON-MILITARY AIRCRAFT FLEETS, 2010 (%)</i>	149
<i>FIGURE 47 (CONTINUED)</i>	150
<i>TABLE 72 ASIA-PACIFIC RETROFIT MARKETS FOR CIVIL AVIATION GPS DEVICES, THROUGH 2016 (\$ MILLIONS)</i>	150
<i>TABLE 72 (CONTINUED)</i>	151
<i>MOTOR VEHICLES</i>	151
<i>TABLE 73 ASIA-PACIFIC MARKETS FOR MOTOR VEHICLE NAVIGATION DEVICES, THROUGH 2016 (\$ MILLIONS)</i>	151
<i>FIGURE 48 ASIA-PACIFIC MARKETS FOR MOTOR VEHICLE NAVIGATION DEVICES, COUNTRY SHARES, 2010-2016 (%)</i>	152
<i>TABLE 74 ASIA-PACIFIC AUTOMOBILE PRODUCTION, 2010–2016 (MILLION UNITS/% OF TOTAL GLOBAL PRODUCTION)</i>	153
<i>TABLE 75 ASIA PACIFIC SHARES OF GLOBAL MARKET FOR PORTABLE GPS VEHICLE NAVIGATION SYSTEMS, 2010 (%)</i>	154
<i>TABLE 76 ASIA-PACIFIC MARKET FOR GPS VEHICLE NAVIGATION SYSTEMS</i>	154
<i>TABLE 76 (CONTINUED)</i>	155
<i>PEOPLE AND ANIMAL TRACKING</i>	155
<i>TABLE 77 ASIA-PACIFIC MARKET FOR MOBILE LOCATION TECHNOLOGY-ENABLED PEOPLE AND ANIMAL TRACKING DEVICE BY REGION, THROUGH 2016 (\$ MILLIONS)</i>	156
<i>MACHINE CONTROL</i>	157
<i>FIGURE 49 ASIA-PACIFIC MARKET FOR CONSTRUCTION EQUIPMENT, 2010 (% OF TOTAL GLOBAL EXPENDITURES)</i>	157
<i>TABLE 78 ASIA-PACIFIC EXPENDITURES ON GPS MACHINE CONTROL, THROUGH 2016 (\$ MILLIONS)</i>	158
<i>MARINE</i>	158
<i>TABLE 79 ASIA-PACIFIC MARKETS FOR MARINE GPS DEVICES, THROUGH 2016 (\$ MILLIONS)</i>	158
<i>TABLE 79 (CONTINUED)</i>	159
<i>MILITARY</i>	159

<i>TABLE 80 ASIA-PACIFIC COUNTRIES' EXPENDITURES ON MILITARY APPLICATIONS OF MOBILE LOCATION TECHNOLOGY, THROUGH 2016 (\$ MILLIONS)</i>	160
RECREATION	160
<i>FIGURE 50 ASIA-PACIFIC EXPENDITURES ON SPORTS AND RECREATION EQUIPMENT, 2010 (% OF TOTAL GLOBAL EXPENDITURES)</i>	160
<i>FIGURE 50 (CONTINUED)</i>	161
<i>TABLE 81 ASIA-PACIFIC EXPENDITURES ON RECREATIONAL GPS RECEIVERS, THROUGH 2016 (\$ MILLIONS)</i>	161
SURVEYING AND MAPPING.....	161
<i>TABLE 82 ASIA-PACIFIC EXPENDITURES ON GPS SURVEYING AND MAPPING EQUIPMENT, THROUGH 2016 (\$ MILLIONS)</i>	162
ASSET MANAGEMENT	162
<i>TABLE 83 ASIA-PACIFIC EXPENDITURES ON GPS ASSET MANAGEMENT APPLICATIONS, THROUGH 2016 (\$ MILLIONS)</i>	162
CHAPTER EIGHT: EMERGING MARKETS	163
SUMMARY.....	163
<i>TABLE 84 EMERGING MARKETS FOR MOBILE LOCATION TECHNOLOGY BY APPLICATION, THROUGH 2016 (\$ MILLIONS)</i>	163
AVIATION SEGMENT.....	163
<i>TABLE 85 OTHER MARKETS FOR CIVIL AVIATION GPS DEVICES, THROUGH 2016 (\$ MILLIONS)</i>	164
MOTOR VEHICLES	164
<i>TABLE 86 EMERGING MARKETS FOR MOTOR VEHICLE NAVIGATION DEVICES, THROUGH 2016 (\$ MILLIONS)</i>	164
PEOPLE AND ANIMAL TRACKING.....	165
<i>TABLE 87 OTHER COUNTRIES MARKET FOR MOBILE LOCATION TECHNOLOGY-ENABLED PEOPLE AND ANIMAL TRACKING DEVICES, THROUGH 2016 (\$ MILLIONS)</i>	165
MACHINE CONTROL.....	165
<i>TABLE 88 OTHER COUNTRIES' EXPENDITURES ON GPS MACHINE CONTROLS, THROUGH 2016 (\$ MILLIONS)</i>	165
MARINE.....	166
<i>TABLE 89 OTHER COUNTRY MARKETS FOR MARINE GPS DEVICES, THROUGH 2016 (\$ MILLIONS)</i>	166
MILITARY.....	166
<i>TABLE 90 OTHER COUNTRIES' EXPENDITURES ON MILITARY APPLICATIONS OF MOBILE LOCATION TECHNOLOGY, THROUGH 2016 (\$ MILLIONS)</i>	166
RECREATION	167
<i>TABLE 91 OTHER COUNTRIES' EXPENDITURES ON RECREATIONAL GPS RECEIVERS, THROUGH 2016 (\$ MILLIONS)</i>	167
SURVEYING AND MAPPING.....	167

<i>TABLE 92 OTHER COUNTRIES' EXPENDITURES ON GPS SURVEYING AND MAPPING EQUIPMENT, THROUGH 2016 (\$ MILLIONS)</i>	167
--	-----

ASSET MANAGEMENT	167
------------------------	-----

<i>TABLE 93 OTHER COUNTRIES' EXPENDITURES ON GPS ASSET MANAGEMENT APPLICATIONS, THROUGH 2016 (\$ MILLIONS)</i>	168
--	-----

CHAPTER NINE: COMPANY PROFILES	169
--------------------------------------	-----

AISIN SEIKI CO., LTD.	169
----------------------------	-----

ALLEN OSBORNE ASSOCIATES, INC.	169
-------------------------------------	-----

AXONN, LLC	169
------------------	-----

BENEFON OYJ	170
-------------------	-----

CELL-LOC LOCATION TECHNOLOGIES, INC.	170
---	-----

CMT, INC.	170
----------------	-----

COBRA ELECTRONICS CORP.	171
------------------------------	-----

COMPASSCOM SOFTWARE CORP.	171
--------------------------------	-----

DELORME PUBLISHING CO.	171
-----------------------------	-----

DENSO CORP.	172
------------------	-----

DIGITAL ANGEL CORP.	172
--------------------------	-----

EKAHAU, INC.	173
-------------------	-----

ESRI.....	173
-----------	-----

FEI-ZYFER, INC.	173
----------------------	-----

FREEFLIGHT SYSTEMS, INC.	174
-------------------------------	-----

GARMIN, LTD.	174
-------------------	-----

<i>FIGURE 51 GARMIN, LTD. GPS SALES BY TYPE OF APPLICATION, 2010 (%)</i>	175
--	-----

GPS TRACKS.....	175
-----------------	-----

GUARDIAN MOBILITY CORP.	176
------------------------------	-----

HEMISPHERE GPS	176
----------------------	-----

HONEYWELL AEROSPACE.....	176
--------------------------	-----

ISECURETRAC	177
-------------------	-----

ITRAK CORP.	177
------------------	-----

L-3 INTERSTATE ELECTRONICS CORP.	178
---------------------------------------	-----

LEICA GEOSYSTEMS AG.....	178
--------------------------	-----

LINKSPOINT.....	178
-----------------	-----

LOCKHEED MARTIN CORP.	179
----------------------------	-----

MAGELLAN NAVIGATION, INC.	179
--------------------------------	-----

NAVCOM TECHNOLOGY, INC.	179
------------------------------	-----

NAVICO, INC.....	180
------------------	-----

NAVMAN, LTD.	180
-------------------	-----

NOVATEL, INC.	181
--------------------	-----

PANASONIC CORP. OF NORTH AMERICA	181
--	-----

PRO TECH	181
----------------	-----

RAYMARINE, PLC.....	182
---------------------	-----

RAYTHEON CO.....	182
------------------	-----

ROCKWELL COLLINS, INC.	183
SIRF TECHNOLOGY, INC./CSR.....	183
SOKKIA CO., LTD.....	184
SPERRY MARINE.....	184
SUUNTO OY.....	184
TELEMETRY SOLUTIONS.....	185
TIMEX CORP.....	185
TOMTOM NV.....	185
TOPCON POSITIONING SYSTEMS, INC.....	185
TRIMBLE NAVIGATION, LTD.....	186
<i>FIGURE 52 TRIMBLE NAVIGATION SALES BY APPLICATION, 2010</i>	
<i>(%).....</i>	<i>186</i>
TRIPOD DATA SYSTEMS.....	187
TRUE POSITION.....	187
VECTRONIC AEROSPACE GMBH.....	187
WHERE, INC.....	188
ZEBRA TECHNOLOGIES CORP.....	188
XANAVI INFORMATICS CO., LTD.....	188
XATA CORP.....	189