

ANMD-MRS29-286 · Smart Farming & Precision Agriculture

# GPS Guidance and Auto-Steering Systems

*A Global Sustainability Due Diligence & Market Research Study*

History 2020–2024 · Base Year 2025 · Forecast 2025–2032 · Outlooks 2035 / 2040 / 2050 · Currency US\$

## WHY THIS REPORT

GPS guidance and auto-steering systems deliver centimetre-accurate machine control, eliminating overlap and skips across every pass and forming the backbone of precision agriculture. This decision-grade study sizes the global market three ways — value, volume and guided hectares — across the report’s segmentation axes, seven regions and four scenarios to 2032, with outlooks to 2050.

## SUSTAINABILITY & SDG IMPACT — THE ANMD LENS

Sustainability is this report’s backbone, not an afterthought. Beyond productivity, gps guidance and auto-steering systems deliver measurable input savings, resource efficiency and lower environmental footprint, while data-driven precision strengthens the natural-capital story.

### Mapped Sustainable Development Goals:

<b>SDG 2</b> Zero Hunger	<b>SDG 6</b> Clean Water	<b>SDG 7</b> Affordable & Clean Energy	<b>SDG 13</b> Climate Action	<b>SDG 15</b> Life on Land
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### Measurable sustainability outcomes assessed:

- Fuel and input savings from eliminated overlap
- Reduced soil compaction through controlled traffic
- Higher field efficiency and operator productivity
- Electronics embodied carbon and end-of-life as material risks

**Framework alignment:** Double materiality mapped to GRI, SASB, ISSB, TCFD, TNFD, CSRD and the EU Taxonomy, with greenwashing and SDG-washing screens applied throughout.

## WHAT'S INSIDE AT A GLANCE

<b>53</b> Chapters	<b>9</b> Report Parts	<b>7</b> Regions Covered	<b>40+</b> Country Markets
<b>2025–32</b> Forecast Horizon	<b>4</b> Forward Scenarios	<b>25+</b> Companies Profiled	<b>5</b> SDGs Mapped

## REPORT COVERAGE

Geographic scope: North America, Europe, Asia Pacific, Latin America, Africa, Middle East and Rest of World — with named country intelligence. North America commercial leader ; Europe scaling on regulation ; Asia Pacific scale engine.

## MARKET OVERVIEW

### From manual steering to centimetre-accurate autonomy — where every pass lines up perfectly.

GPS guidance is moving from premium feature to baseline precision infrastructure. Demand is driven by the convergence of input-saving pressure, labour scarcity and the broader precision-agriculture stack, supported by maturing RTK and correction networks across North America, Europe and Asia Pacific. The market is read three ways — value, units shipped and guided hectares — and forecast under conservative, base, accelerated and disruption scenarios, with every projection resolved to the 2025 base year and each region reported separately rather than folded into Rest of World.

- North America leads early commercialisation, anchored by the United States and Canada, where high auto-steer penetration, large acreage and correction networks are most advanced.
- Europe is scaling, with Germany, France and the Netherlands combining precision adoption with strong equipment and dealer supply.
- Asia Pacific is accelerating, supported by Australia, China, India and Japan, where broadacre and labour-saving drivers are strongest.
- System type and component segment the value, across RTK auto-steer, guidance displays and steering kits, and across receivers, controllers and displays, each with distinct economics.
- Overlap reduction is the differentiator, input and fuel savings plus longer hours — and increasingly precision-stack enablement — underpin returns that manual driving cannot match.

## REGIONAL OUTLOOK

Across the seven reporting regions, the report separates early commercialisation leaders from high-growth and emerging markets, profiling named country sub-markets, policy regimes and project pipelines in each. North America and Europe anchor near-term adoption; Asia Pacific scales on food security and labour drivers; while Latin America, Africa and the Middle East are assessed on their own merits — for productivity, water security and rural development — rather than aggregated away.

Region	Stage	Lead Markets & Drivers
North America	Commercial leader	United States, Canada — large acreage, precision-ag adoption, dealer & agronomy networks
Europe	Scaling on regulation	Germany, France, Netherlands — input-reduction rules, CAP linkage, equipment supply
Asia Pacific	Scale engine	China, India, Japan, Australia — food security, labour decline, broadacre & drone adoption
Latin America	Emerging	Brazil, Argentina — large-scale row crops, agribusiness integration
Africa	Frontier	South Africa, Kenya, Morocco — food security, smallholder digitisation, blended finance
Middle East	Frontier	Saudi Arabia, UAE, Israel — water security, controlled-environment & agtech investment

## KEY MARKET DRIVERS & RESTRAINTS

Drivers	Restraints
<ul style="list-style-type: none"> <li>• Input, fuel &amp; overlap-reduction savings</li> <li>• Labour scarcity &amp; operator-fatigue relief</li> <li>• Precision-agriculture stack foundation</li> <li>• Extended working hours &amp; throughput</li> <li>• RTK, correction-service &amp; GNSS advances</li> </ul>	<ul style="list-style-type: none"> <li>• RTK-coverage &amp; correction-service gaps</li> <li>• Upfront receiver &amp; steering-kit cost</li> <li>• Brand-lock-in &amp; interoperability limits</li> <li>• Signal reliability &amp; multipath in terrain</li> <li>• Subscription &amp; support-cost barriers</li> </ul>

## SEGMENTATION SNAPSHOT

<b>By System Type</b>	RTK auto-steer · guidance displays · steering hardware kits · correction / GNSS services · implement-guidance
<b>By Component</b>	GNSS receivers · steering controllers · wheel-angle sensors · displays · antennas
<b>By Application</b>	Farms & growers · custom operators · cooperatives · dealers
<b>By End User</b>	Farms & growers · custom operators · cooperatives · dealers
<b>By Business Model</b>	Equipment purchase · SaaS · lease · managed-service
<b>By Deployment</b>	Row crops · specialty · broadacre · orchard

## TABLE OF CONTENTS — PARTS & CHAPTERS

The full report is organised into nine parts across 53 chapters, listed below. Detailed sub-headings, country tables and directories are provided in the full report.

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- › Chapter 2. Industry Discovery Summary — GPS Guidance and Auto-Steering Systems
- › Chapter 3. Executive Intelligence and Decision Dashboard
- › Chapter 4. Strategic Findings, Materiality and Investment Verdict Preview

### Part II — Market Intelligence, Sizing, Forecasting and Segmentation

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## Part VIII — Scenario, Future Intelligence and Final Due Diligence Verdict

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## Part IX — Annexes, Directories and Reference Material

- › Chapter 47. Methodology Annex
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- › Chapter 53. Reference Annexes

## COMPETITIVE & INVESTMENT SNAPSHOT

The competitive field spans established OEM guidance divisions, precision-GNSS specialists, and aftermarket innovators. Profiled players include John Deere, Trimble Ag, Topcon Agriculture, CNH / Raven and Hexagon Ag. Deal activity — partnerships, technology licensing and demonstration programmes — signals a market consolidating around bankable, repeatable designs.

### Representative players profiled in the full report:

Deere & Company · Trimble Inc. · Topcon Positioning Systems, Inc. · CNH Industrial N.V. / Raven Industries, Inc. · Hexagon AB · and 20+ further profiled players across the value chain.

**Investment intelligence:** venture, growth, infrastructure, development, climate and blended finance, green bonds and sustainability-linked instruments — culminating in a bankability assessment and a Go / No-Go / Conditional-Go investment verdict.

## KEY QUESTIONS THIS REPORT ANSWERS

- ? How large is the global gps guidance and auto-steering systems market, and how fast will it grow to 2032?
- ? Which regions, countries and segments offer the strongest risk-adjusted opportunity?
- ? How do precision-agriculture economics change returns versus conventional methods?
- ? Who leads, and where is the competitive and patent white space?
- ? Is the investment case bankable — and under what conditions?
- ? How does the technology align with the SDGs and emerging disclosure regulation?

## WHY ANMD — THE DIFFERENCE

*Most market studies stop at units and revenue. This report is built as a sustainability due diligence instrument — fusing market sizing with ESG, SDG, climate, water and natural-capital intelligence and a decision-ready bankability verdict in a single architecture.*

- **Triangulated sizing** — every market read three ways so value, volume and area views reconcile rather than conflict.
- **Region-honest forecasting** — Latin America, Africa and the Middle East reported in full, never hidden inside Rest of World, every forecast resolved to the 2025 base year.
- **Integrated evidence base** — company, patent and project databases linked to the analysis, with published-filing patents and FTO treated as an indicator, not a legal conclusion.
- **No-fabrication discipline** — every estimate carries a data-confidence rating and disclosed sources; gaps are flagged for further diligence, never filled with invented numbers.
- **Anti-greenwashing rigour** — SDG-washing and greenwashing screens plus claim-substantiation checks built into the ESG and project analysis.
- **Decision-first structure** — 9 Parts and 53 Chapters culminating in stakeholder playbooks and a clear Go / No-Go / Conditional-Go investment verdict.

## WHO SHOULD BUY THIS REPORT

Investors, manufacturers, growers, agronomists, cooperatives, policymakers, lenders, and corporate strategy and ESG teams — alongside strategic corporate planners and decision-makers.

### Access the Full Report

The complete report delivers all 53 chapters in full, with every sub-heading, country table, company and patent directory, forecast model and due diligence checklist.

Purchase at [www.anewmarketdynamics.com](http://www.anewmarketdynamics.com) · Standard & Premium licences · Single-Site (SSL) and Global-Site (GSL) options at checkout.

### Want the Complete Detailed Table of Contents?

This prospectus lists the nine parts and 53 chapters. The complete detailed table of contents — every sub-heading, country table, exhibit, company and patent directory and annex — is available on request to registered users. To receive it, register with your official company email at [www.anewmarketdynamics.com](http://www.anewmarketdynamics.com). The full detailed table of contents will be sent directly to your registered company email address.