

A photograph of a GPS satellite in orbit above the Earth. The satellite is a complex structure with a central body and two large, rectangular solar panel arrays extending outwards. The Earth's surface is visible below, showing a mix of land and ocean. The text is overlaid on this image.

# North American GPS Avionics Retrofit Markets

General and Business Aviation Markets

Executive Summary

September 2007

# Executive Briefing

## Market Findings

- Garmin maintains a dominant GPS retrofit market share position, with estimated 2007 market share between 75 and 85 percent
- Lowrance and AvMap and are the only two other players of note within portable and handheld markets
- This market is still essentially limited by the number of aircraft; even with 3,500 new airframes/year the total addressable market remains stable
- There is a shrinking addressable market for retrofits in both business and general aviation, due to market saturation, equipment and installation costs and economics of upgrading aging platforms
- The trend toward forward fit GPS and/or integrated avionics suites in new aircraft further decreases retrofit opportunities through 2018 and beyond
- Roughly 3,500 aircraft/year are produced within BA and GA in North America; nearly all will have GPS and/or integrated avionics capabilities

## Key Figures

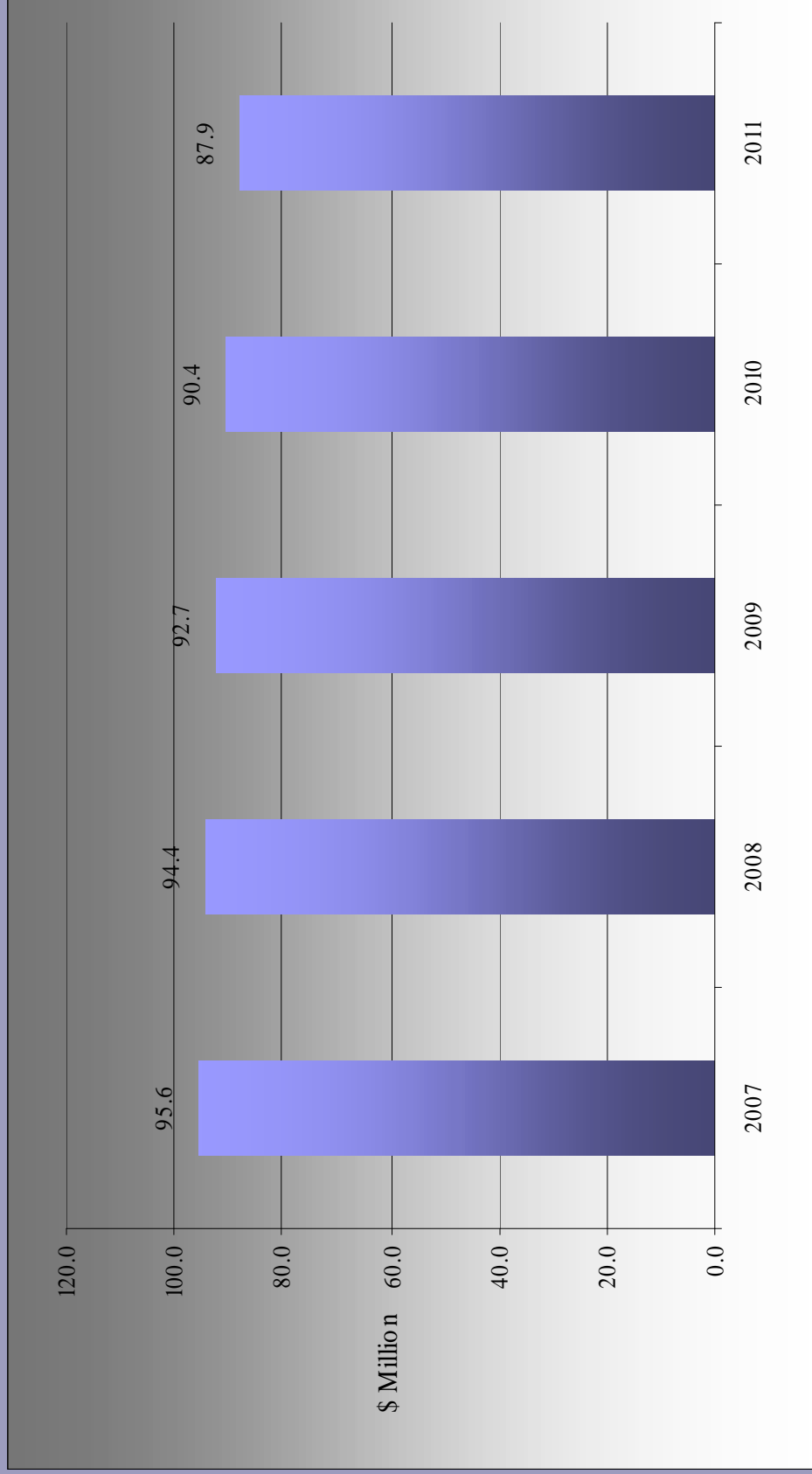
- Market will decrease from \$95.6 million in 2007 to 61.4 million in 2018
- Revenues will total \$980.5 million over the 2007-2018 forecast period
- Revenue Compound Annual Growth Rate for the forecast period is -6.0%
- 2007 average equipment value is \$6,165 per aircraft, although this number is heavily influenced by integrated systems
- On an installed base sample of 1,297 aircraft, G2 Solutions found a 92.5 percent GPS equipage rate among both GA and BA Aircraft
- Approximately 182,000 units will flow into this market between 2007-2018

## Near Term Outlook

- Opportunities for new sales and installations do exist within General Aviation, despite all the talk of this being a saturated market. At the end of the GA market equipment sales of portable and handheld units are forecast to achieve a CAGR of 2.2 percent through 2018
- G2 Solutions does not expect an equipment price decline in either integrated systems or panel mount GPS systems. Increased capabilities (e.g. WAAS, XM and others) will have equipment prices inching higher throughout the forecast period



# Total General and Business Aviation GPS Retrofit Market Revenues (USD million) 2007-2011



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**Current Events**

**New Research titles to be released in September:**

- General and Business Aviation GPS Retrofit Market
- US Department of Defense Aircraft Maintenance and Repair Analysis

G2 Analysts will be attending the annual NBAA Convention in Atlanta, GA. Please [contact us](#) if you would like to meet us there

G2 Solutions market analysis studies are now exclusively available from [AviationToday.com](#). Please visit the [Research Publications](#) section for more information or follow this link directly.

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Future research notes will include:

[This month's Industry Spotlight: Market Analysis:](#)

- General Aviation Avionics Market
- Autopilot Market Analysis
- Commercial Aircraft Market Forecast
- Airborne GPS Retrofit Markets



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