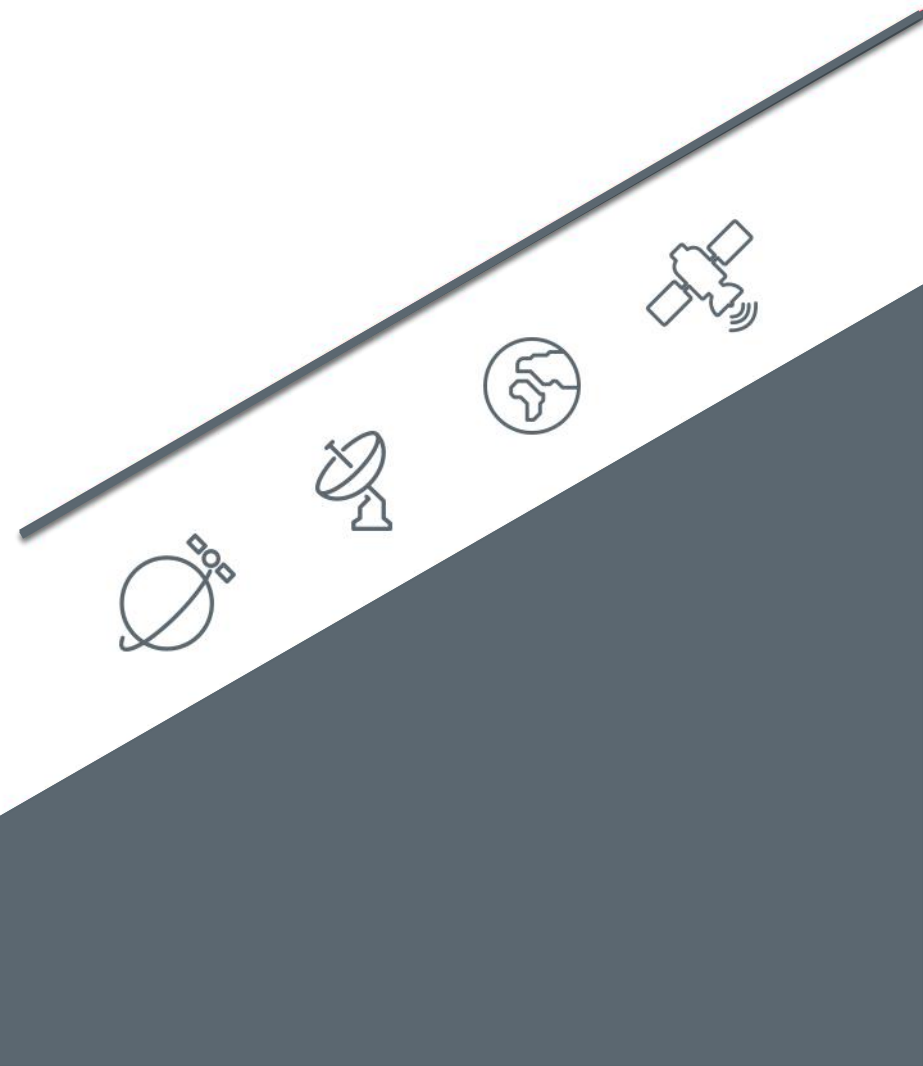




Market study on key GNSS segments in Mexico and the region

Conclusions

Galileo Information Centre for Mexico, Central America and the Caribbean



GIC objective countries



The analysis presented in the following sections will address the different GNSS markets for the countries listed below.

Objective countries

- **Mexico**
- **Central America:** Belize, Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua, Panamá.
- **The Caribbean:** Antigua and Barbuda, Bahamas, Barbados, Cuba, Dominica, Dominican Republic, Grenada, Guyana, Haiti, Jamaica, St Kitts and Nevis, St Lucia, St Vincent and the Grenadines, Suriname, Trinidad and Tobago and Venezuela.

GNSS market analysis

According to the 2019 EUSPA GNSS market report the global GNSS market is expected to continue growing, in terms of devices and services. South-America and the Caribbean are still a bit behind. This scenario can be improved with the appropriate actions in the region.

- Analysis of the GNSS markets



To identify the market segments with the greatest potential and benefit the most from the use of EGNSS technologies.

- Market segments analysed



Evaluation methodology

- Importance & market growth
- Innovation & GNSS initiatives
- Previous experience
- Other barriers: regulatory, political barriers, social, economic

Market segments evaluation

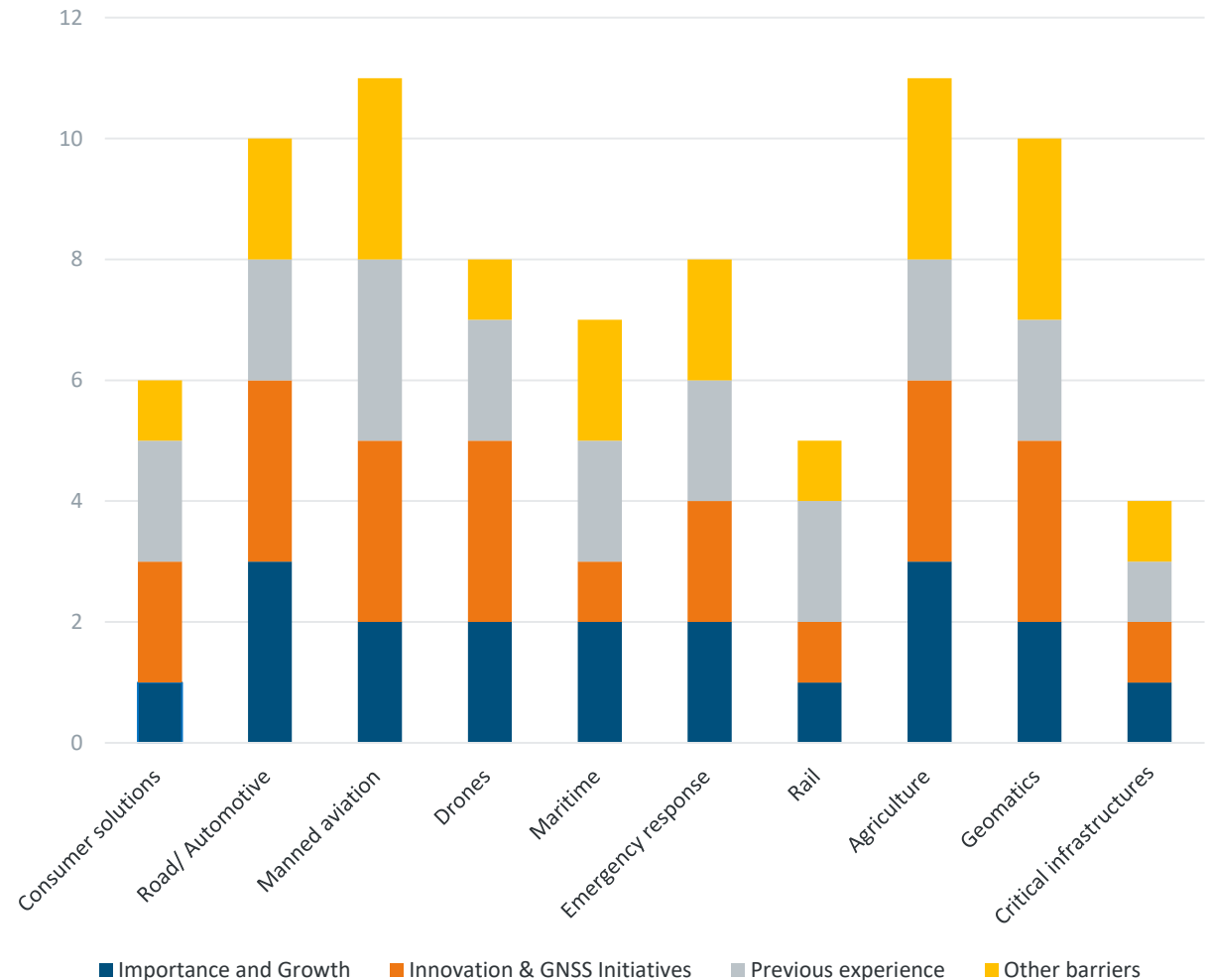
Selected market segments

Evaluation methodology

Feature	Value		
	1	2	3
1.Importance & market growth	The market segment does not present a significant role within the region's economy	The market segment presents medium importance or slow expected growth in the near future	The market segment presents high importance, contributing to the countries' GDP, generating jobs and with expected growth in the future
2. Innovation & GNSS initiatives	Market segment very traditional, with low or none innovation. No GNSS solutions in place. Little room for EGNSS solutions (for example, if further investments at infrastructure level are needed).	Market segments recently started to include innovative/GNSS solutions. Market segment that will benefit from the added value provided by EGNSS (although GNSS could be less known if no previous GNSS solutions in place).	Highly innovative market segment, in which new technologies and developments are deployed for the benefit of users. Market segment with implemented GNSS solutions. Market segment that will benefit the most from the added value provided by EGNSS.
3. Previous experience	Little experience among the project team.	Less experience among the project team and some European developments that can be taken as references to cover the gaps.	Relevant experience among the project team and many reference cases to be taken as examples
4. Other barriers: Regulatory, political barriers, social, economic	Many barriers found that will limit the development of GNSS solutions	A few barriers found to be overcome	No significant barriers found

Market segments evaluation in the countries covered by the GIC

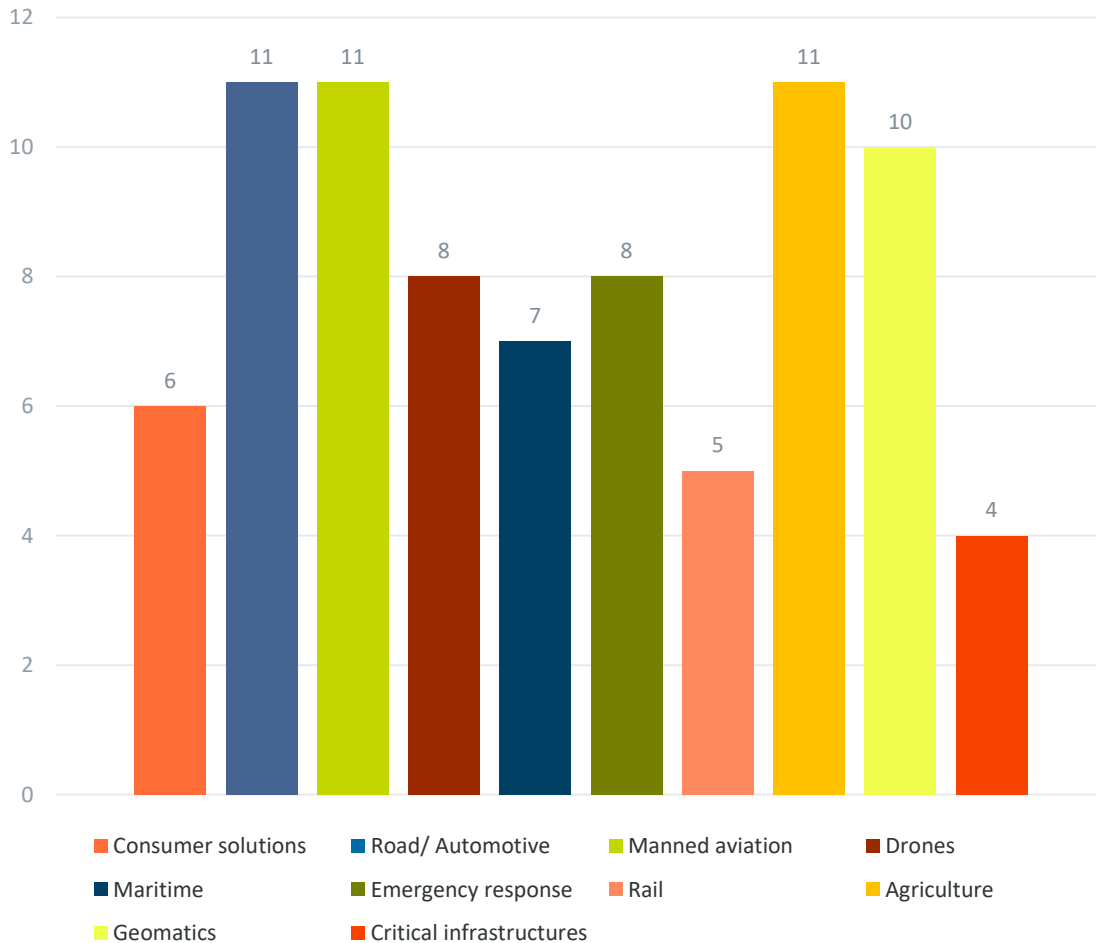
	Importance and Growth	Innovation & GNSS Initiatives	Previous experience	Other barriers	TOTAL
Consumer solutions	1	2	2	1	6
Road/ Automotive	3	3	2	2	11
Manned aviation	2	3	3	3	11
Drones	2	3	2	1	8
Maritime	2	1	2	2	7
Emergency response	2	2	2	2	8
Rail	1	1	2	1	5
Agriculture	3	3	2	3	11
Geomatics	2	3	2	3	10
Critical infrastructures	1	1	1	1	4



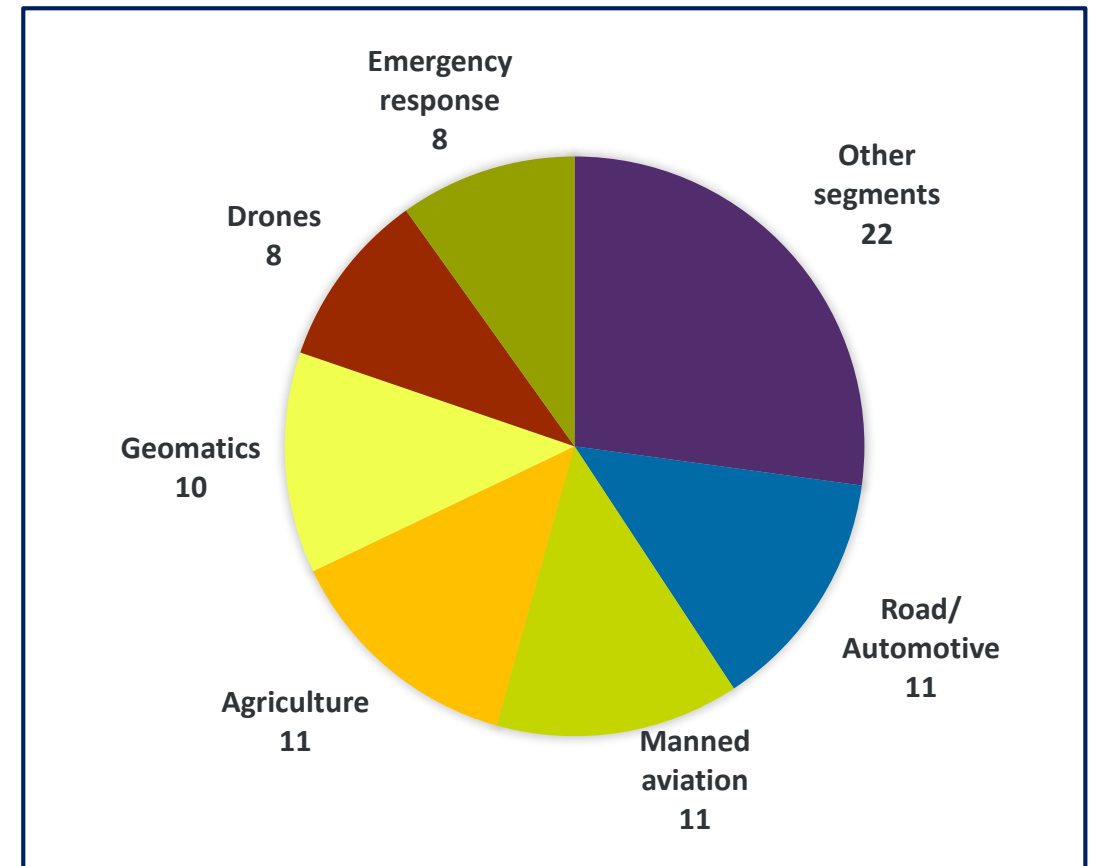
Date of analysis: January 2022

Source: Own elaboration

Ranking of each market segment



Selected market segments with the greatest potential for the adoption of EGNSS solutions



Date of analysis: January 2022

Source: Own elaboration