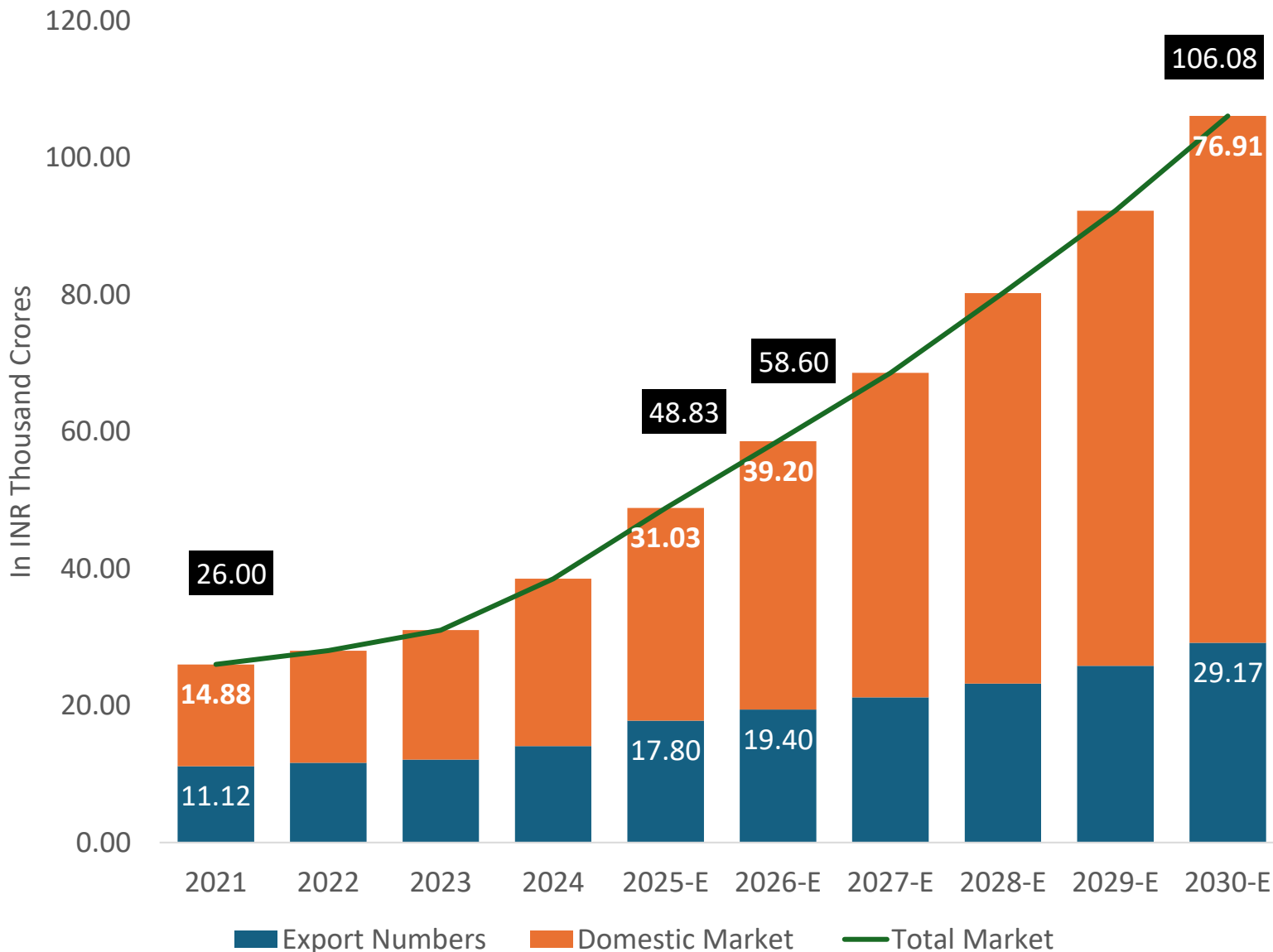


# **INDIAN GEOSPATIAL INDUSTRY MARKET OUTLOOK 2025–2030**

**A Strategic Assessment of India's Evolving Geospatial  
Ecosystem**

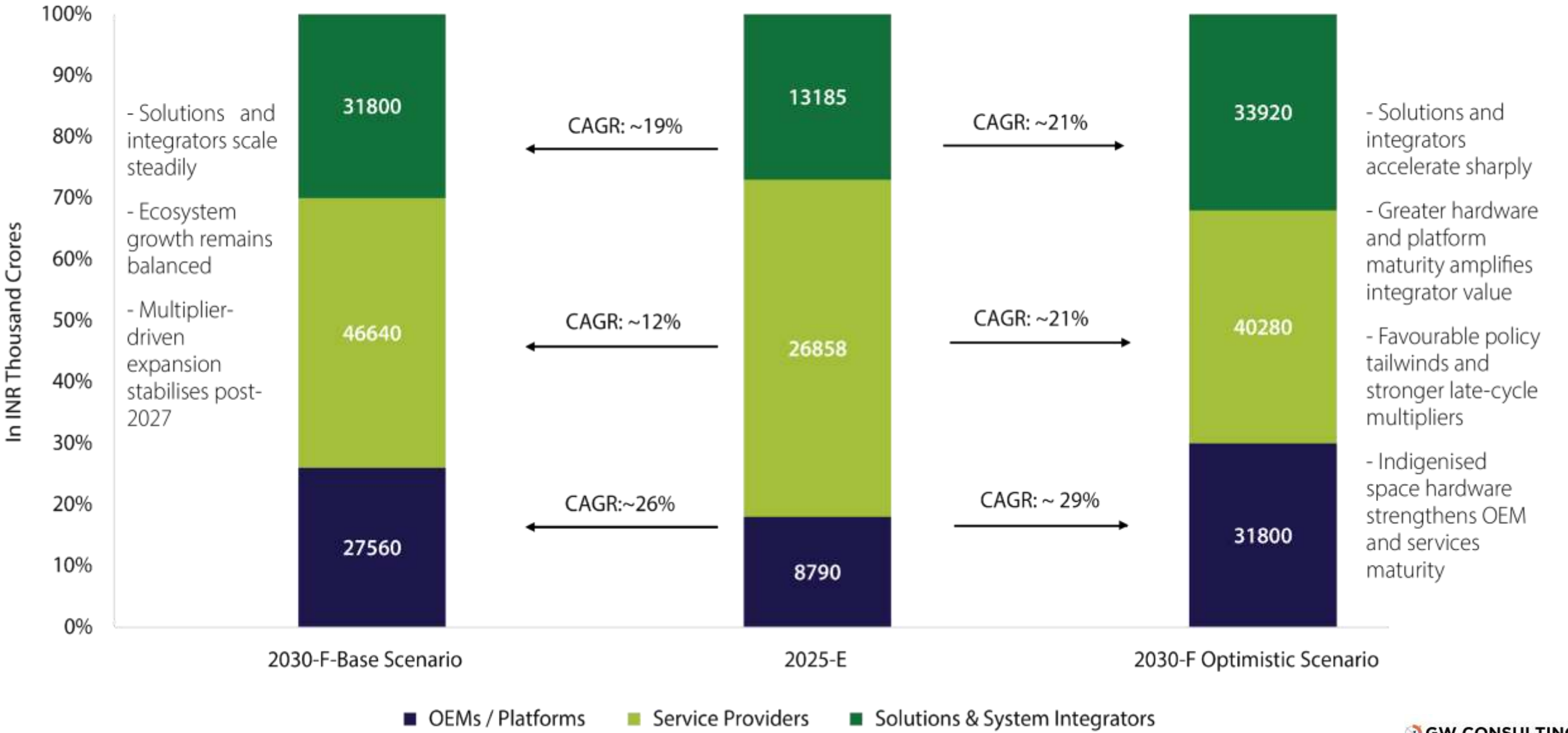
**Ananyaa Narain  
Vice President- Consulting  
Geospatial World**

## Indian Geospatial Market [Domestic and Export] Market Size and Forecast: 2021-2030

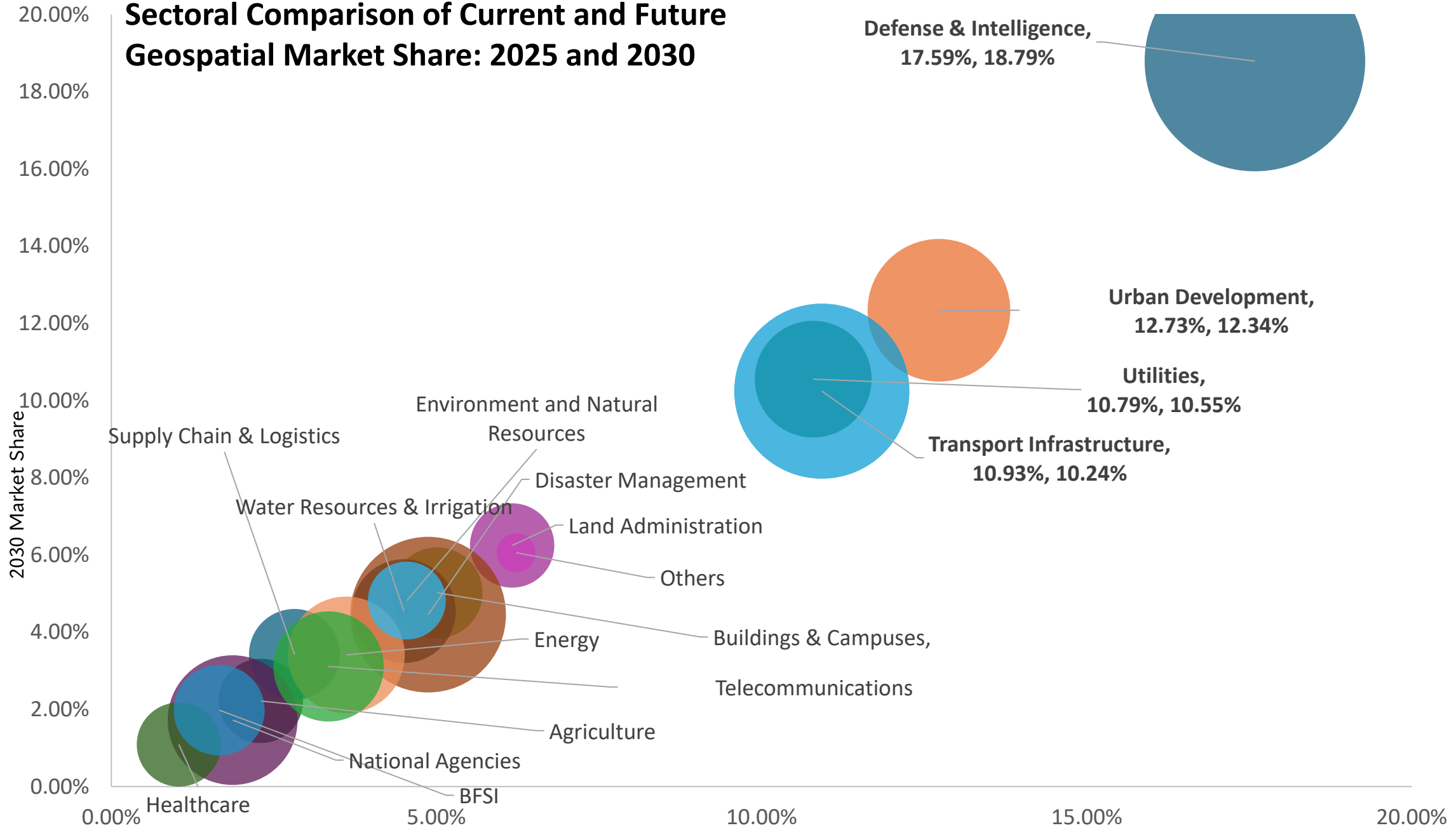


- Policy liberalisation—supported by institutional mechanisms such as **GDPDC and IN-SPACE**—and national geospatial–space missions is accelerating widespread adoption of spatial technologies across government and industry.
- Flagship programmes like **Gati Shakti, SVAMITVA, NAKSHA, National Geospatial Mission, & SANGAM** are embedding geospatial workflows into core governance, planning, and infrastructure delivery.
- **Increasing localisation of sensors, satellites, and platforms** is boosting indigenous capability and lowering dependency on upstream imports.
- **Enterprise adoption** is rising as telecom, energy, logistics, agriculture, insurance, and manufacturing integrate spatial intelligence into decision-making.
- **Advanced use cases**—including drone mapping, 3D city models, satellite monitoring, and digital twins—are scaling rapidly across urban and industrial ecosystems.
- **Export growth is accelerating at 11% CAGR** as regions adopt India’s modular, cloud-native geospatial platforms; while solution demand increases across AI-as-a-Service, Digital twin creation, GIS-BIM Model Development, Data-driven asset management, Utility Network Digital Transformation, IoT-Driven Analysis, ADMS, etc.

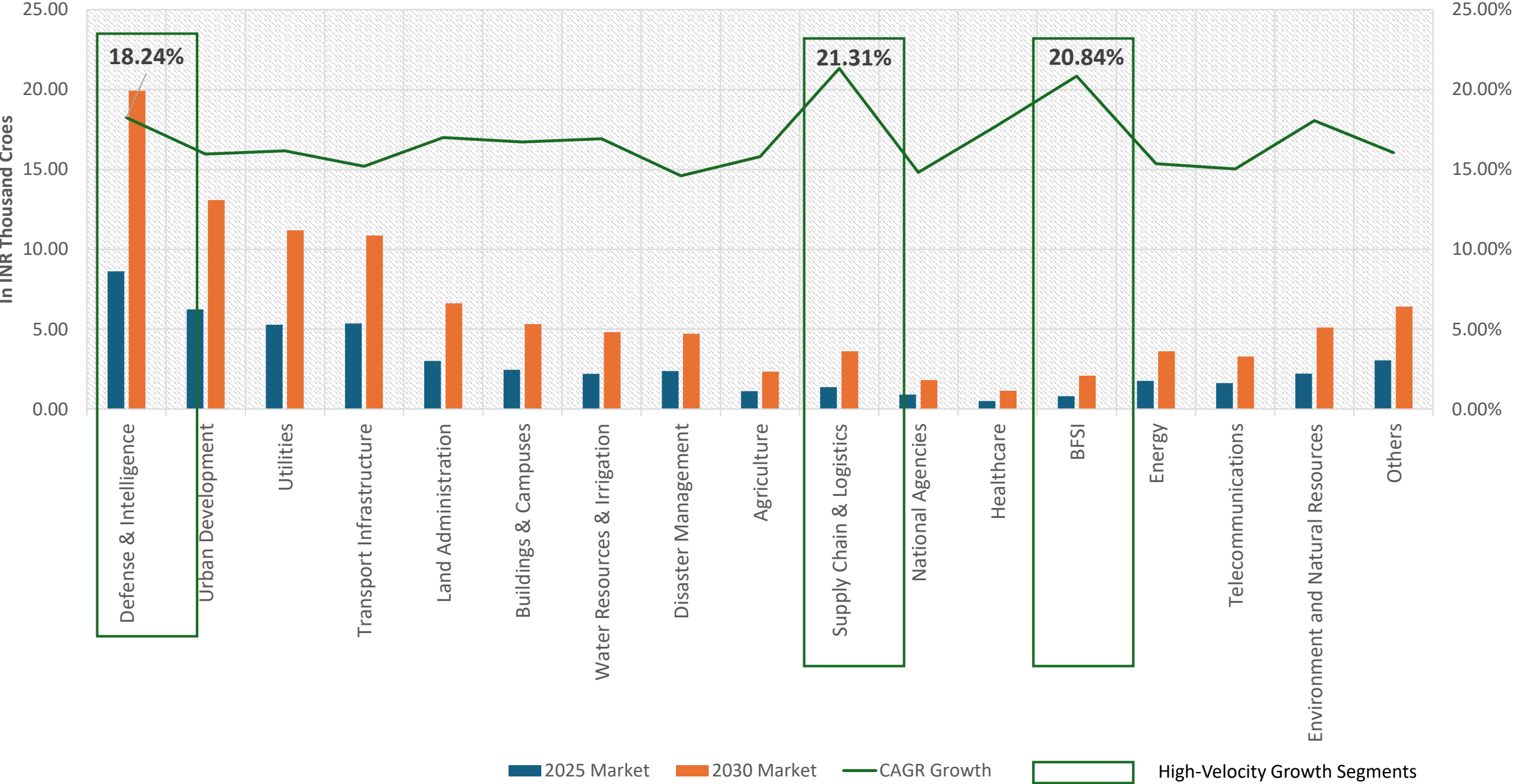
# India's Geospatial Market Outlook by Business Offerings 2025& 2030: Comparative Growth of OEMs, Service Providers, and Integrators Across Base and Optimistic Scenarios



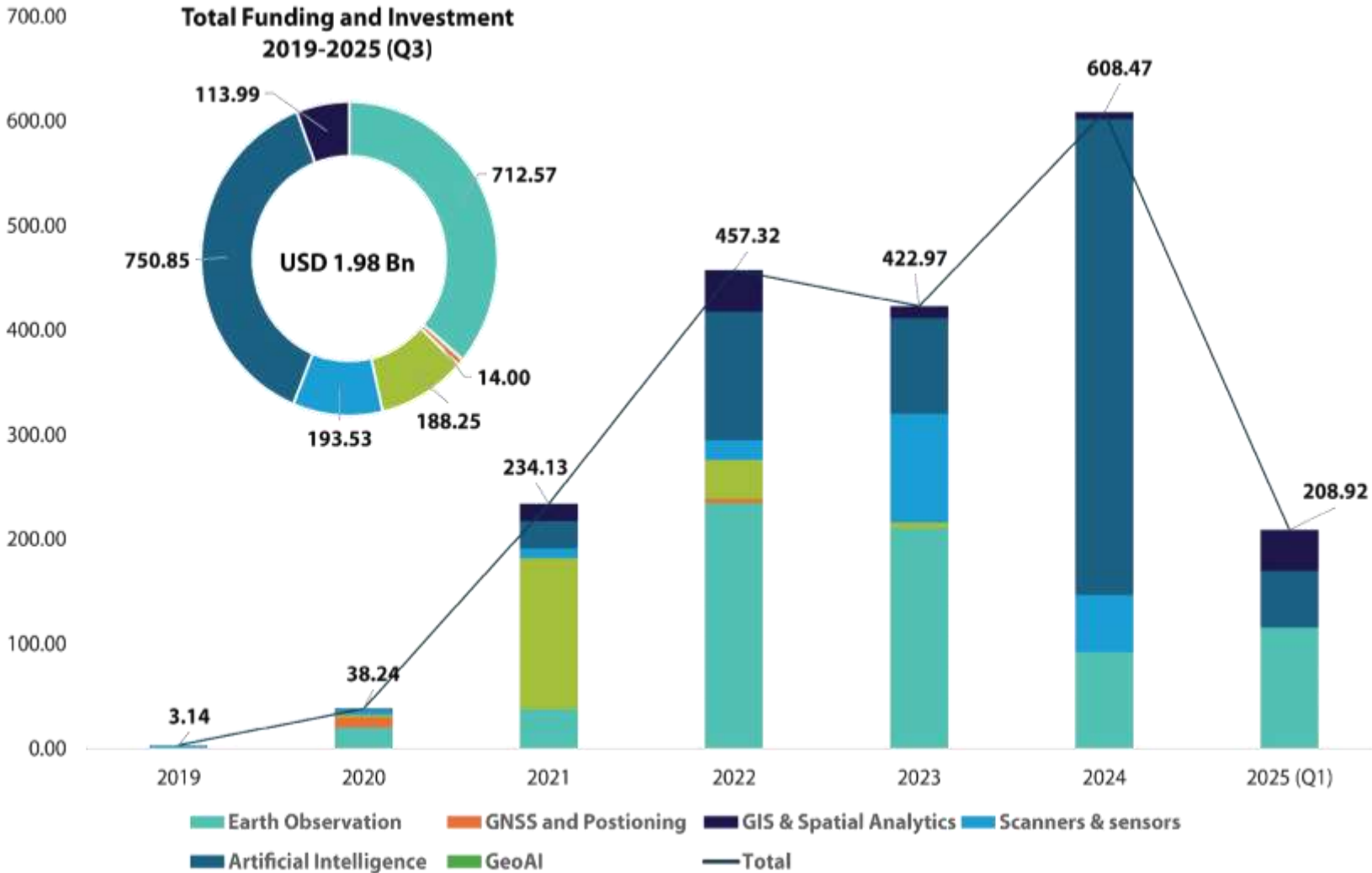
# Sectoral Comparison of Current and Future Geospatial Market Share: 2025 and 2030



# India Geospatial Market: High Velocity Markets



# Strategic Investment Trends Reshaping India's Space, Geospatial, AI & GeoAI Landscape (2019–2025Q3)

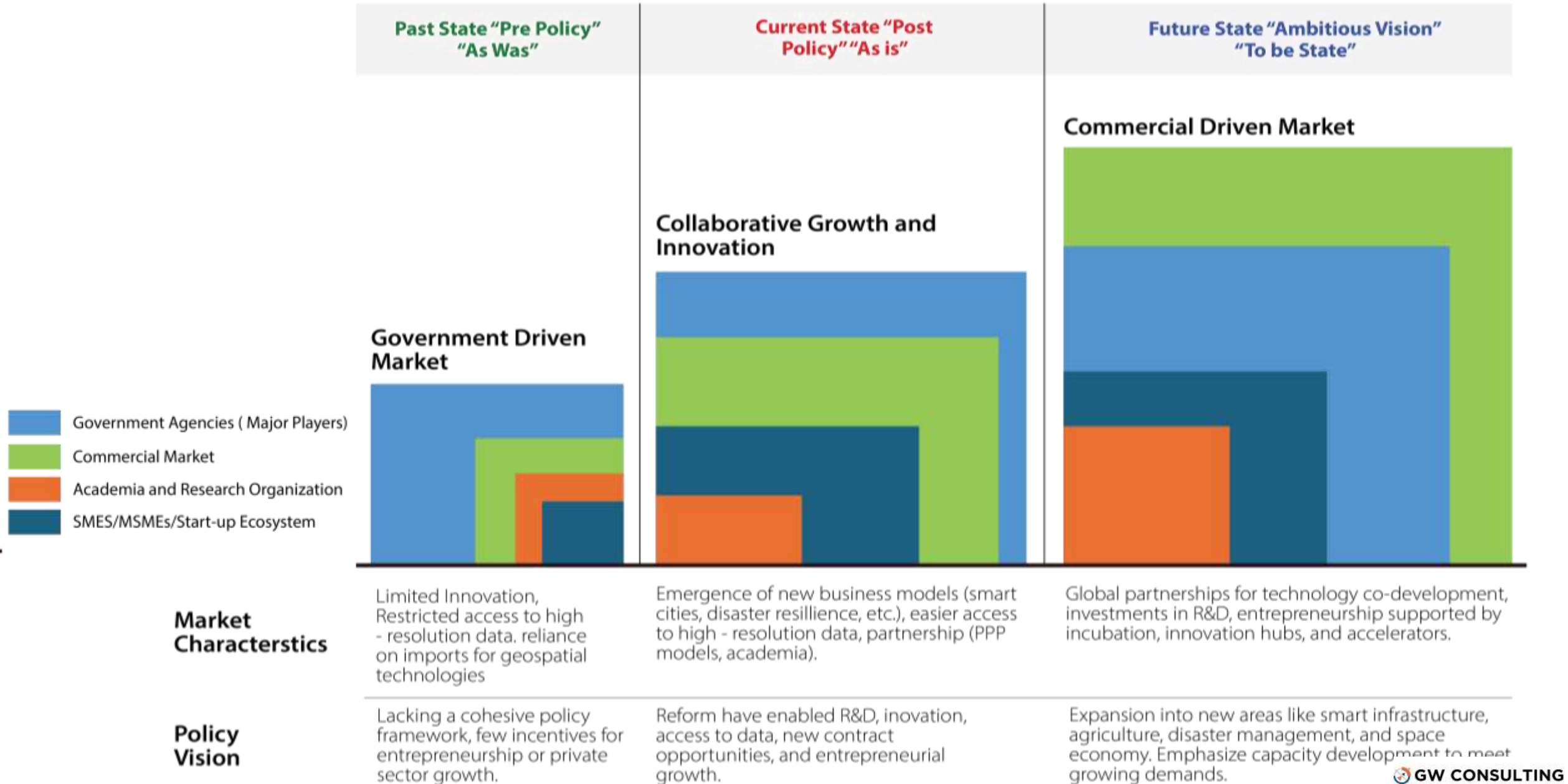


**265** Total Number of Investors

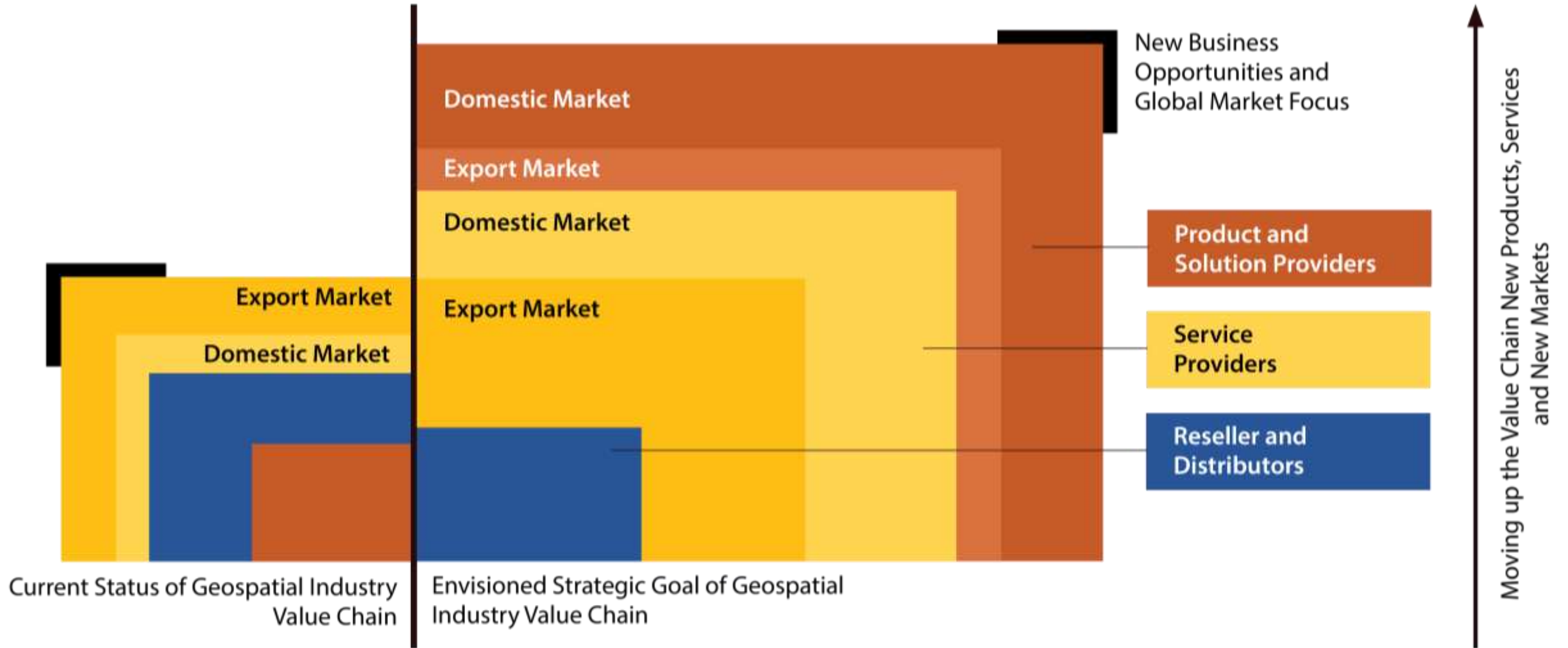
**215** Unique Investments

- 1. Capital Shift to Integrated Spatial-Intelligence Platforms** - Investment is consolidating around full-stack platforms that convert EO and geospatial data into decision intelligence, rather than standalone hardware or raw-data providers.
- 2. Defence and Sovereign-Tech Attracting Rapid Capital Inflows**- Dual-use startups in ISR, SSA, drones, robotics, and sensing are drawing significant funding as strategic national-security enablers.
- 3. Increasing Polarisation Across Funding Stages** Large rounds concentrate around foundational AI and next-gen space systems, while most early-stage firms raise modest cheques. Mid-stage growth capital remains scarce.
- 4. Public Markets Becoming Viable Exit Routes**- Recent IPOs in geospatial and dual-use tech validate public-market exits, strengthening late-stage valuations and attracting institutional capital.
- 5. Public-Private Co-Funding Now Essential for Early Deep-Tech** - Investors favour startups aligned with national missions and supported by ISRO, IITs, T-Hub, or IN-SPACe, with blended funding crucial to de-risk capital-intensive models.

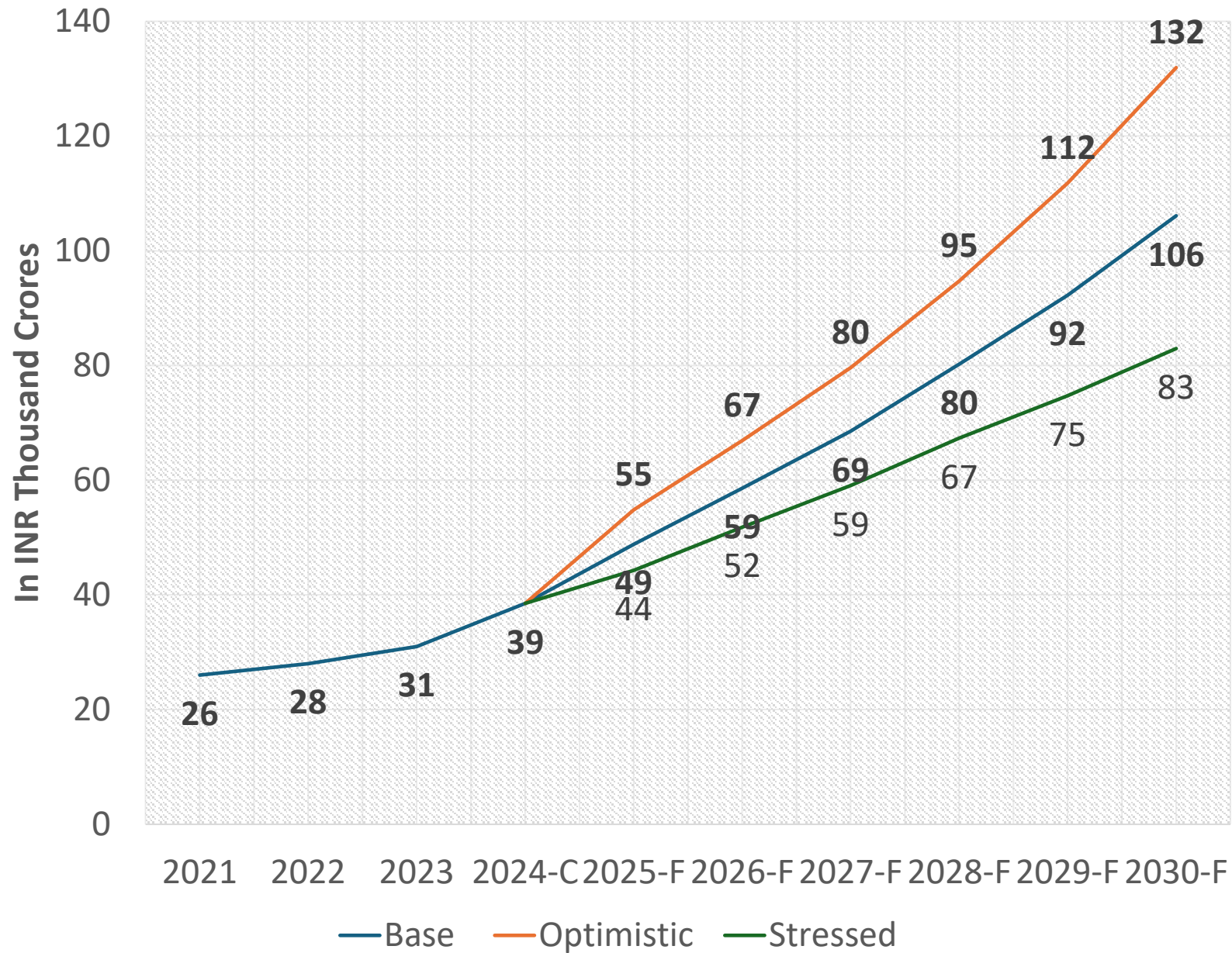
# India Geospatial Market Value Chain – from a Government Controlled Market to a Commercially driven Market



# India Geospatial Market Value Chain – Current Status and Envisioned Strategic Goal



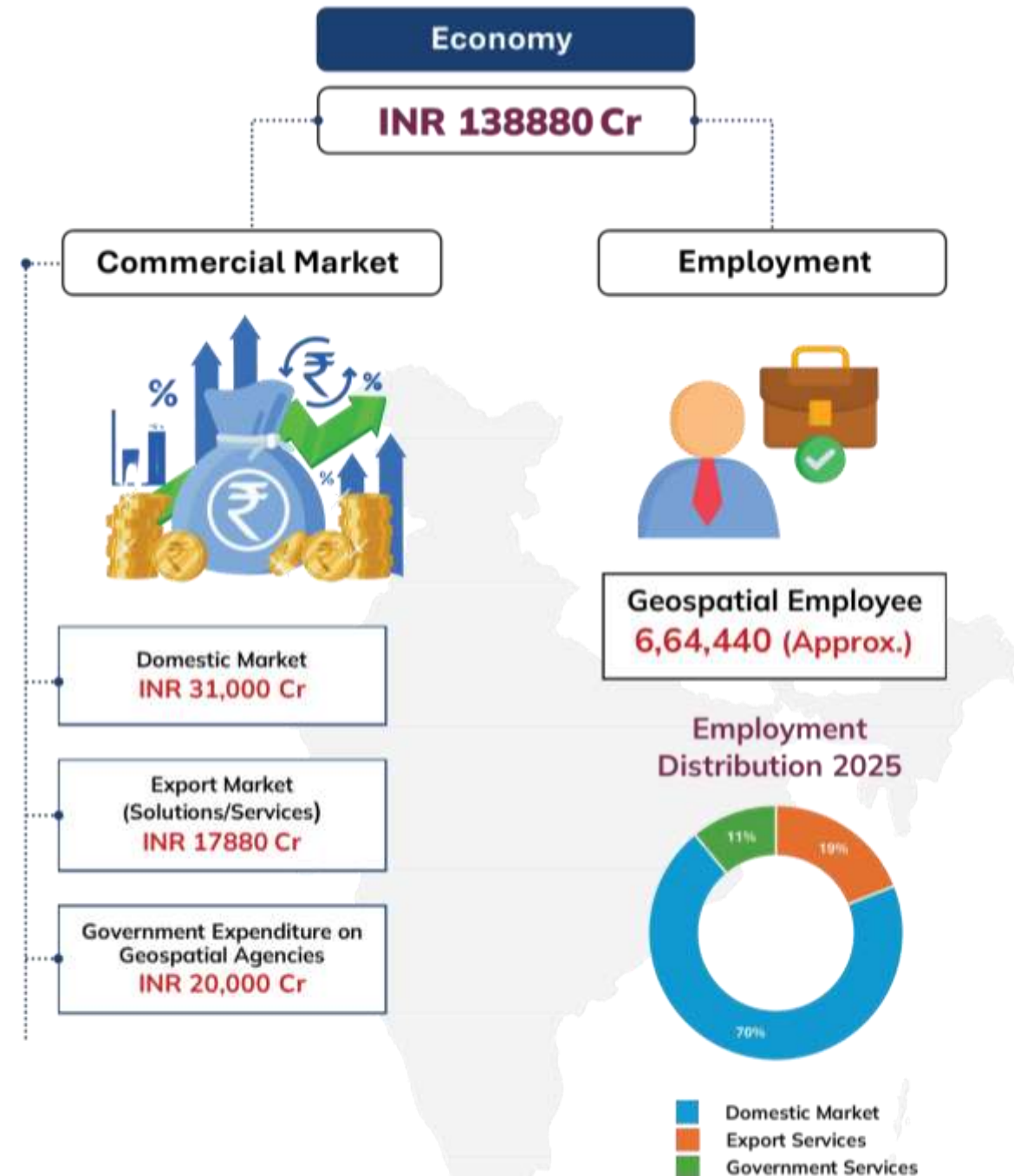
# Decadal Outlook for India's Geospatial Market Under Varying Economic Conditions



- **Faster policy execution** and early delivery of national mapping, 3D modelling, and digital-twin programmes unlock larger, faster government workflows.
- **Enterprises rapidly scale IoT-spatial integration and digital-twin adoption** across major sectors, sharply lifting platform utilisation.
- **Accelerated domestic maturation** of EO, SAR, hyperspectral and sensor ecosystems reduces import dependency and lowers costs.
- **Exports surge as MEA, ASEAN, Africa, and Latin America** increase demand for India's affordable analytics, climate intelligence, and digital-twin solutions.
- **A rapidly expanding sovereign geospatial market** drives technology maturity, productisation, and stronger global competitiveness.
- **Trade barriers, delayed programmes, and slow enterprise uptake** suppress demand and liquidity, constraining the market to ~₹83 thousand crore by 2030.

# Indian Geospatial Economy - 2025

- India's geospatial economy has become a core pillar of national infrastructure, reaching **INR 1.38 lakh crore in 2025** (including workforce value) and supported by a **6.65-lakh professional talent base**.
- The domestic market is projected to grow from **INR 31,000 crore in 2025 to INR 1,06,000 crore by 2030 (~19% CAGR)**, driven by defence, urban development, utilities, transport, and expanding adoption in BFSI, logistics, and digital commerce.
- Exports—**INR 17,880 crore in 2025**—are emerging as a major growth engine, expected to approach **INR 30,000 crore by 2030** as global demand strengthens for Indian downstream analytics, EO services, and location platforms.
- **Government investment of ~INR 20,000 crore** annually and policy enablers such as the National Geospatial Policy 2022 and Indian Space Policy 2023 are accelerating private participation and national-scale geospatial infrastructure.
- The value chain is rapidly evolving toward AI-driven analytics, drone mapping, automation, digital twins, and platform-led applications, supported by **significant workforce compensation of ~INR 70,000 crore**.
- **By 2030, India is positioned to shift from an import-dependent ecosystem to a globally competitive geospatial hub**, combining sovereign capability, export acceleration, and diversified high-value applications across public and commercial sectors.



# Thank you !

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