Euroconsult

A complete analysis & forecast of satellite manufacturing & launch service

Satellites to be Built & Launched by 2028

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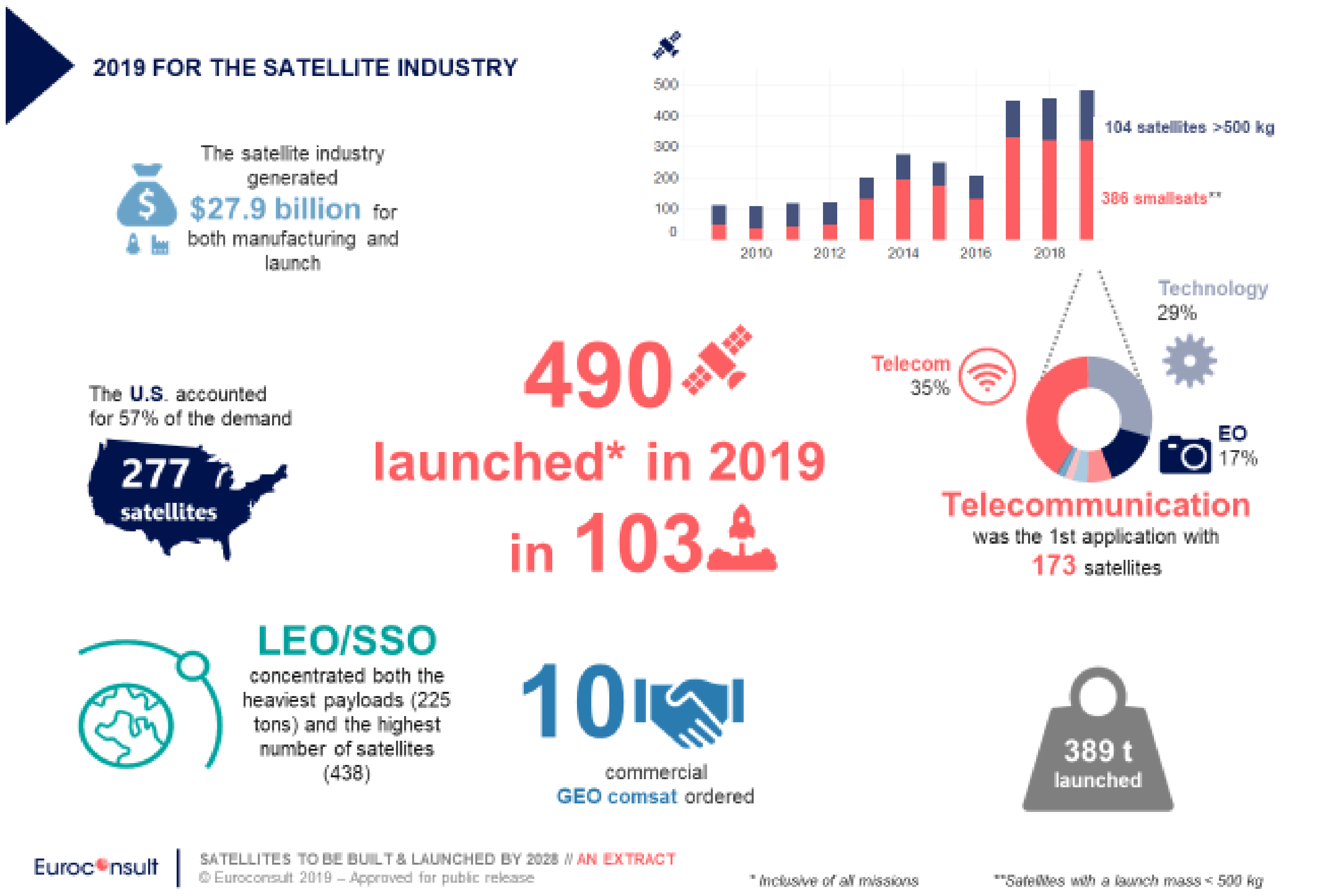


Euroconsult projects that the satellite market will experience a radical transformation in the quantity, value and mass of the satellites to be built and launched with a four-fold increase in the number of satellites at a yearly average of 990 satellites to be launched, compared to a yearly average of 230 satellites in the previous decade. The market will reach $292 billion over the next decade. This reflects a 28 percent increase over the previous decade which totalled $228 billion in revenues.

These changes are characterized by several factors:

- LEO and MEO constellations are expected to account for 77 percent of the projected demand in the next decade driven by broadband projects like SpaceX's Starlink, Oneweb, Amazon's Project Kuiper, Telesat LEO and SES's O3b mPOWER.
- Incumbent GEO comsat commercial satellite operators are transitioning from a legacy of GEO comsat broadcasting business to more data-centric use cases, impacting satellites orders. The gradual recovery of contracts will continue, following the low point of seven awards in 2017 with demand driven by the first orders of satellites with fully reconfigurable digital payload.
- Euroconsult expects an average of 13 GEO comsat orders per year post-2020 based on a replacement scenario that considers the competition of NGSO satellite systems and the introduction of life extension services. Demand from global and regional GEO comsat operators will reach a yearly average of $8 billion over the next ten years.
- Civil government agencies are projected to be the top drivers of satellite demand, accounting for 40 percent of the entire market value, ahead of both defense and commercial demand. This is a result of increasing interest in space science, exploration, and Earth observation. On the defense side, a new cycle of orders is beginning with new strategies and replacement satellites needed by the U.S., China, Russia, Japan, India and Europe.

ABOUT SATELLITES TO BE BUILT & LAUNCHED BY 2028

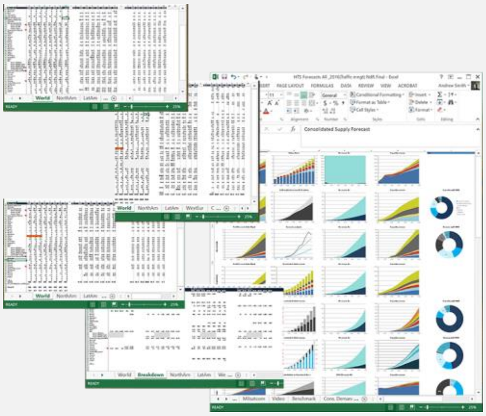
This research product is based on in-depth analysis of **satellite applications and missions**, **satellite operators and users, technology advances**, and the impact of these factors on **the manufacturing and launch industry**. It includes a database of all satellites, regardless of mass, that **were launched from 2009 to 2019**, as well as satellites currently under construction, and those **forecast to launch by 2028**. It also provides detailed status and maturity assessments of 55 commercial constellations of five satellites or more and discusses the business cases for the four mega-constellations and their differing vertical integration strategies.

EXTENSIVE FIGURES & ANALYSIS FOR THE COMING DECADE

All Euroconsult reports have, at their core, data derived from over 30 years of tracking all levels of the satellite/space value chain. To this we add dozens of dedicated industry interviews each year, along with the continual refinement of our data models, and the collection and interpretation of company press releases and financial filings. Our consultants have decades of experience interpreting and analyzing our proprietary databases in light of the broader value chain.

When you purchase research from Euroconsult, you receive thousands of data points and the expert interpretation of what this means for specific verticals and sectors of the satellite value chain, including forecasts based on years of data and highly refined models.

This report contains Extensive Excel budget database, with thousands of data points, covering annual space budgets from 1990 to 2028.



THE REPORT INCLUDES:

- ✓ Analysis of the demand through three KPIs: number of satellites, mass to be launched and market value (manufacturing and launch)
- ✓ Dozen of graphs highlighting the key figures
- ✓ Two time periods of reference: 2009-2018 for historical trends and 2019-2028 for forecasts
- ✓ Global trends, forecasts and benchmarks by orbits, application, mass categories, type of customers and regions
- ✓ Commercial, Government civil and defense satellite demand breakdown

A MUST READ FOR:

- ✓ Administrations & Space Agencies
- ✓ Satellite & Equipment Manufacturers
- ✓ Satellite Operators
- ✓ Launch Service Providers
- ✓ Investors & Financial Institutions

KEY TRENDS, DRIVERS & FORECASTS FOR SATELLITES TO BE BUILT & LAUNCHED BY 2028

SATELLITES TO BE BUILT & LAUNCHED BY 2028 is a reference for industry players & leaders around the globe. The report provides critical information for policy, business and strategic planning in the space business, including:

- ✓ Strategic outlook containing global trends, forecasts
- ✓ Satellite supplier analysis & Launch supply analysis
- ✓ Extensive satellite database, with thousands of data points, covering supply and demand from 2009 to 2028.

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