The essential tool for business planning & investment decisions in the ground segment industry

Ground Segment Market Prospects
Forecasts to 2028s

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The commercial satellite ground segment market, including satcom applications, EO applications and user terminals for satcom applications, is going through significant expansion in terms of both capabilities and demand and will grow from $264 million in 2018 to nearly $360 million in 2028. The aggregated market value in the next decade is expected to achieve $4 billion. The initial Euroconsult report covers only large gateways, while the second part of the report dedicated to user terminals will be published in several months.

2018 has entailed a point of inflexion in the ground segment industry with the preparation of the OneWeb ground network, the launch of additional HTS systems and the need of further ground stations to provide connectivity with EO constellations. After some years of market consolidation in the teleport industry for satcom applications, the number of ground sites is expected to grow from 2019 driven by new installations in emerging regions. In the EO ground segment, the number of ground stations is steadily growing to serve the increasing demand on EO data and value-added services.

In the last five years, numerous companies have announced new satcom and EO satellite solutions, largely based on constellation projects but also on large HTS systems, aiming to capture new customers. Their feasibility and sustainability are usually focused on the space segment, whereas their business cases need to evaluate them as end-to-end systems, including the ground segment that will be required. Their ground segment CAPEX and OPEX is not negligible and will have an impact on the market adoption of these solutions. Finding a sweet spot between space segment performance, ground segment features, along with service provided and price, will be key for the success of new EO and satcom satellite systems.

The space sector is pushing for substantially more productive satellite infrastructure and ground segment at a lower cost. This trend is expected to intensify over the next decade, coupled with an increasing push for standardization in satellite manufacturing and ground segment equipment. New technological developments (notably SaaS) seek a more productive infrastructure with the aim of making lower cost end-to-end services.
Ground Segment Market Prospects: Part 1, Forecasts to 2028 covers the different application chains in the ground segment including both satcom and EO applications. Part 2 of the report is dedicated to user terminals.

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 thousands of data points.

METHODOLOGY:

The analysis, data and estimates of this report rely on multiple information sources, including:

- A proprietary database on EO and satcom satellites, such as for user terminals, built over the last ten years that includes several million data points on the overall space sector; we enrich and refine this database on a yearly basis.
- A dedicated ground site data bank, from different sources, validated almost individually by visual inspection of each using Google Maps.
- More than 30 international events that we cover involving satellite communications, EO and different application segments.
- A review of industrial, commercial and financial information for relevant stakeholders across the value chain, including teleport operators, satellite operators, service providers and industrial players.
- Dedicated interviews with stakeholders located in the different regions.

REPORT STRUCTURE

ABOUT GROUND SEGMENT MARKET PROSPECTS

WHO WILL BENEFIT FROM THIS REPORT:

✓ Ground equipment manufacturers
✓ User terminal manufacturers
✓ Satellite operators
✓ Ground segment service providers
✓ Investors
✓ Space agencies
✓ Other government institutions
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