Euroconsult

A 360° view of the opportunities and issues related to the Earth observation sector

Satellite-Based Earth Observation

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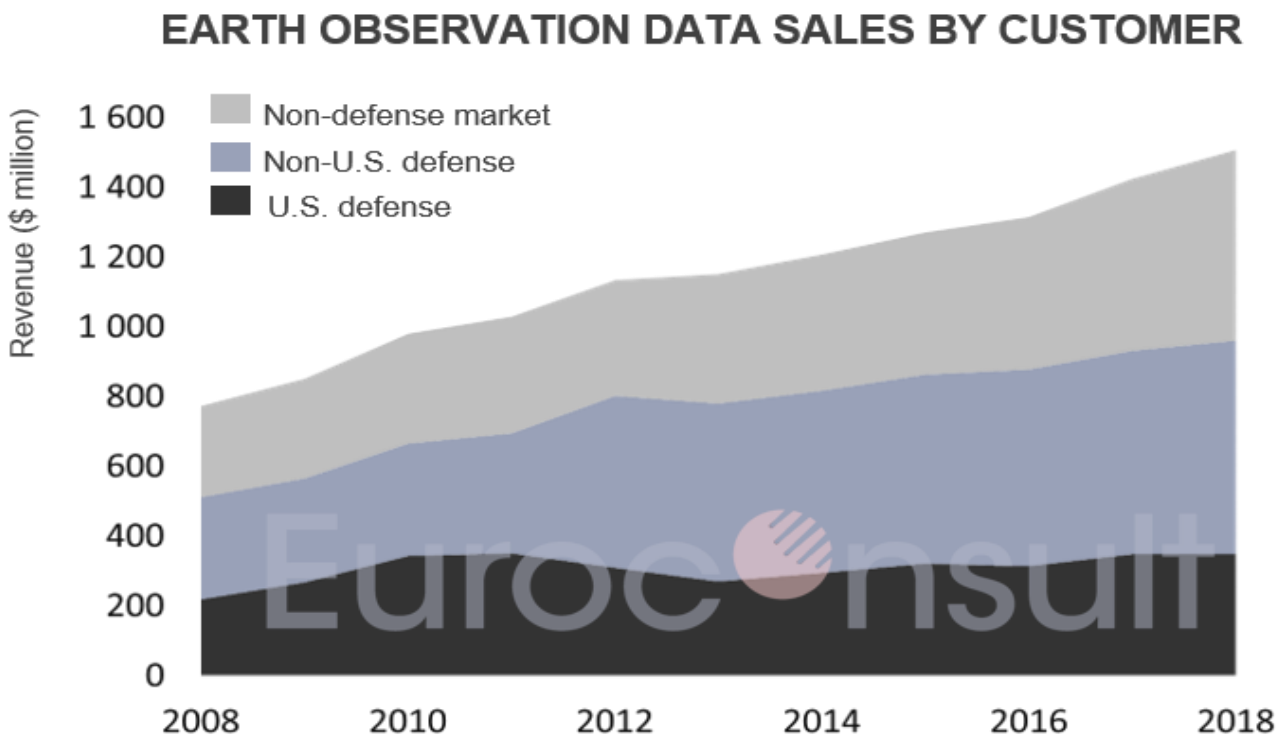


Governments are expected to continue to be key in driving growth over the next decade. The research shows that the total civil government investment in EO programs, including meteorology, in 2018, was $9.8 billion, reflecting 5% growth over 2017. This is the 12th year of continuous investment growth from governments and the trajectory is likely to continue with more than $10 billion of investment in 2019. According to the forecast, 52 countries will have launched at least one EO satellite by 2028.

A growing focus on multi-satellite constellations is significantly changing the market landscape. Constellations increase the frequency of data collection for better global coverage and faster change detection. Euroconsult identified more than 20 companies that intend to develop low cost smallsat constellations for Earth observation, including satellites designed to collect optical, radar and hyperspectral imaging. The report provides detail on each of these proposed constellations and the applications they are pursuing.

Analytics derived from vast quantities of multi-sourced data are driving the shift in revenue generation from imagery to services. Location-based services and financial services are likely to be the first industries to benefit from faster access to this low-cost data in a market previously dominated by government customers."

Market pull for these analytics is also coming from the business intelligence and insurance sectors, as well as from infrastructure site monitoring and precision agriculture. For these types of services, subscriptions and recurring sales to multiple users are expected to keep pricing affordable. New services will also benefit from cloud computing and AI technologies, which will enable even higher data consumption and faster analysis.

In the report, Euroconsult quantifies the number of EO satellites launched and revenue generated from 2009-2018 and compares those numbers to projections for 2019-2028. The report also examines the impact of this growth on downstream businesses such as commercial data and value-added services and discusses nine sectors including nascent markets and emerging business models in eight regions.

ABOUT SATELLITE-BASED EARTH OBSERVATION

This report presents Euroconsult's understanding of the various factors that will drive/inhibit growth in demand for EO satellites and solutions. All demand drivers have been considered, including:

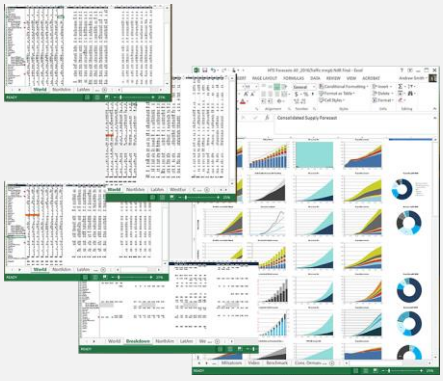
- ✓ The applications and mission of the EO satellites
- ✓ The users and procurers of EO satellites, data and services
- ✓ Government and private-sector investment to support development
- ✓ Implications for the manufacturing and launch-service business
- ✓ Regional and vertical market attitudes impacting/driving growth

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:

- ✓ Nine sectors: Defense, Infrastructure, Environment monitoring , Natural resources monitoring , Energy, Location-based services, Disaster management, Maritime, Finance
- ✓ Six world regions: North America, Latin America, Europe, Russia/CIS, Middle East & Africa, and Asia
- ✓ Data and services market forecast by 2028
- ✓ Detailed description of the largest governmental Earth Observation programs
- ✓ Evolution of data pricing depending on resolution, accuracy and time revisit
- ✓ Impact analysis of new systems

A MUST READ FOR:

- ✓ Administrations & Space Agencies
- ✓ Satellite & Equipment Manufacturers
- ✓ User and Procurer of EO Satellites and data services
- ✓ Launch Service Providers
- ✓ Investors & Financial Institutions

Satellite-Based Earth Observation is a reference for industry players & leaders around the globe. The report provides critical information for policy, business and strategic planning in the earth observation business, including:

- ✓ **Strategy outlook** containing global trends, vertical and regional demand forecast for EO satellite-based data and value-added services from 2013 to 2028
- ✓ A detailed Segment requirements and main applications review
- ✓ Details profiles 12 main leading and new commercial operators

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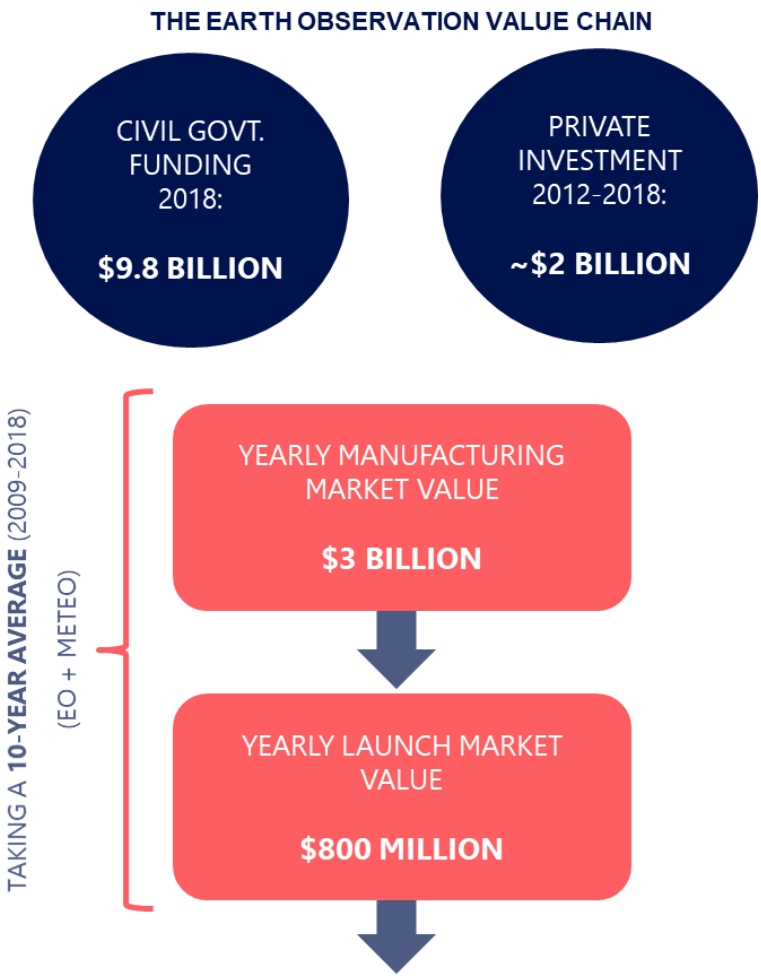

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