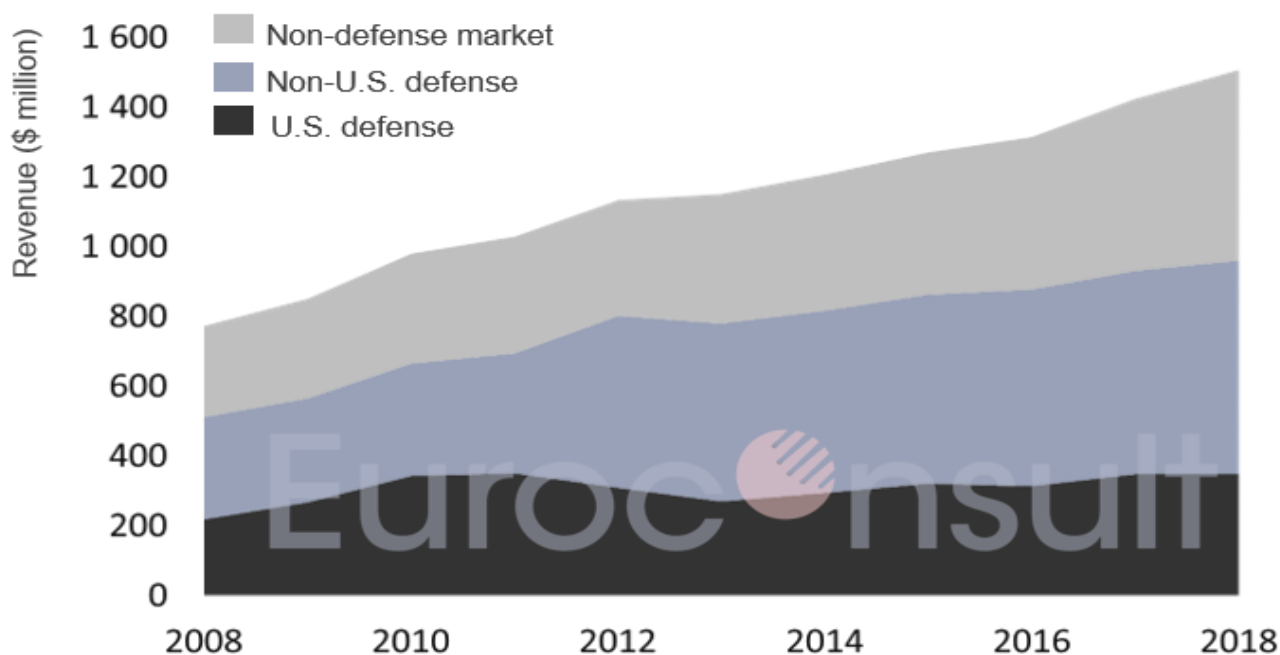


A 360° view of the opportunities  
and issues related to the Earth  
observation sector

**Satellite-Based  
Earth Observation**

## EARTH OBSERVATION DATA SALES BY CUSTOMER



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:

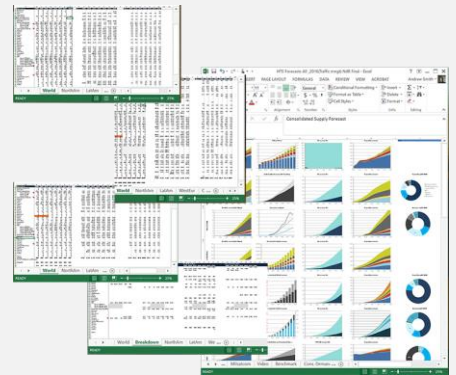
- ✓ The applications and mission of the EO satellites
- ✓ The users and procurers of EO satellites, data and services
- ✓ Government and private-sector investment to support development
- ✓ Implications for the manufacturing and launch-service business
- ✓ Regional and vertical market attitudes impacting/driving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



# TABLE OF CONTENTS

## 1\ STRATEGIC ISSUES AND FORECASTS

- Value-chain summary: investment and upstream
- Value-chain summary: operations and downstream
- Earth Observation satellite launch status: the last 10 years
- Earth Observation satellite launch status: the future decade
- Commercial EO satellites in operation (>50kg)
- Smallsats and the new space environment
- Commercial optical solutions collection capacity
- Approach of the market assessment: methodology
- Commercial data & services demand: summary & logic
- Commercial data demand: current situation
- Commercial data demand: forecast
- Value-added services [baseline] market
- Value-added services [upside] market

### POLICIES AND REGULATIONS:

- Overview
- U.S. focus
- Further supporting policies
- Summary of national frameworks - data policy specifics

## 2\ KEY DRIVERS FOR DATA AND INFORMATION SERVICES

### COMMERCIAL DATA PRICING:

- Catalogue standard tasking price evolution
- Importance of geolocation accuracy and time on pricing
- Free and low-cost solutions

### VALUE-ADDED SERVICES:

- VAS spending per user
- Data consumption evolution
- Cloud computing-based services
- Case studies
- The promise of big data and AI
- Data to analytics

## 3\ PROFILES OF SELECTED ORGANIZATIONS

- Highlights of the previous year in commercial supply
- Earth Observation commercial focus
- Integrated commercial offerings
- Benchmarking satellite operator revenues
- Sample benchmarking satellite by spectral capacity
- Company status: investment raised
- Benchmarking estimated satellite capex and mass to orbit



# TABLE OF CONTENTS - CONTINUED

## EO COMMERCIAL OPERATORS:

- MAXAR TECHNOLOGIES
- AIRBUS
- UrtheCast
- PLANET
- E-GEOS
- BlackSky GLOBAL
- DMCII
- IMAGESAT
- ICEYE
- CAPELLA SPACE
- SATELLOGIC
- ASTRO DIGITAL

## COMMERCIAL POTENTIAL OF NEW SENSOR TYPOLOGIES:

- Exploring further commercial potential with new sensors
- GPS-RO
- Emissions monitoring
- Hyperspectral
- Video
- Branching out in SAR

## **4\ PROSPECTS FOR THE DEVELOPMENT OF NEW SYSTEMS**

### MANUFACTURING AND LAUNCH:

- Manufacturing overview (non-meteorology)
- Focus on export opportunities
- Developing capabilities in smallsats
  - SAR FOCUS
  - OPTICAL FOCUS
- Hardware focus – advances in subsystems
- Launch services market by region
- Launch service providers
- Access to space
- Launch brokers
- Upcoming launch vehicles
- Price points for launch

### GOVERNMENT METEOROLOGY FOCUS

- Meteorology manufacturing market
- Government meteorology spending
- Government meteorology programs

### GROUND SEGMENT IMPLICATIONS

- Implications of growing EO supply on the ground segment
- Expected number of ground stations
- Trends on EO ground segment
- Regional considerations
- EO ground station ecosystem
- Main service providers
- Cost implications



# TABLE OF CONTENTS - CONTINUED

## UAS AND HAPS CAPABILITIES: ROADMAP & MARKET

- Aerial solutions overview
- UAS policies and regulations
- UAS applications and market structure
- UAS and haps along the value chain
- Sample of UAS manufacturer profiles
- UAS examples of commercial and civil government contracts
- Roadmap of UAS capabilities: typology
- High-altitude platforms solutions

## **5\ GOVERNMENT PROGRAM DEVELOPMENT**

- Global trends for civil government earth observation
- Earth observation governments programs' focus
- Earth observation governments focus
- Government supply solutions

## EARTH OBSERVATION PROGRAMS (>\$100 MILLION ANNUALLY):

- UNITED STATES
- CHINA
- EUROPEAN UNION
- ESA
- RUSSIA
- FRANCE
- JAPAN
- INDIA
- SOUTH KOREA
- ITALY
- CANADA

## EARTH OBSERVATION PROGRAMS (<\$100 MILLION ANNUALLY):

- EUROPE (EXC. ESA)
- LATIN AMERICA
- MIDDLE EAST AND CIS
- ASIA
- AFRICA

## **6\ DEMAND FOR EARTH OBSERVATION: BY SECTOR**

- Global revenues distribution: 2018
- Methodology for the prospective model development

### SECTOR DEMAND OVERVIEW:

- Commercial data
- Value-added services
- General
- Data requirements by sector
- Data requirements by key applications

### SECTOR DEMAND:

- Defense
- Infrastructure
- Environment
- Natural resources monitoring energy
- Location-based services
- Disaster management
- Maritime
- Finance



# TABLE OF CONTENTS - CONTINUED

## 7\ DEMAND FOR EARTH OBSERVATION: BY REGION

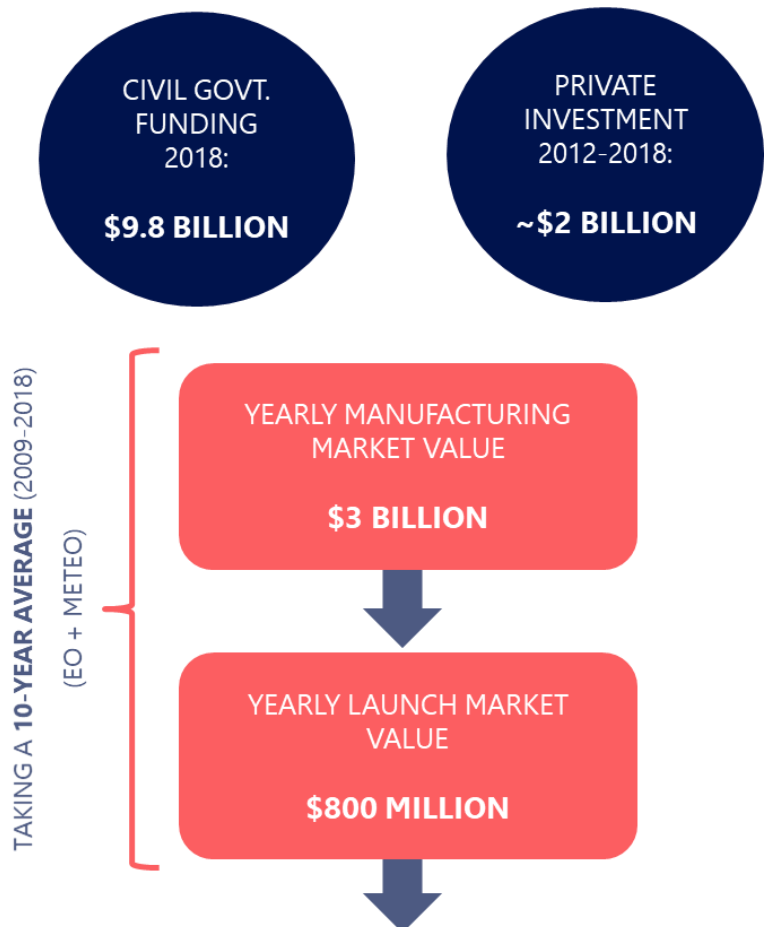
### REGION DEMAND OVERVIEW:

- Commercial data demand by region
- Value-added services demand

### REGIONAL DEMAND SNAPSHOT

- NORTH AMERICA
- EUROPE
- REST OF ASIA
- LATIN AMERICA
- MIDDLE EAST
- SOUTH EAST ASIA & OCEANIA
- AFRICA
- RUSSIA & CIS

### THE EARTH OBSERVATION VALUE CHAIN



**SATELLITE-BASED EARTH OBSERVATION: MARKET PROSPECTS TO 2028 (2019 Edition)**

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