

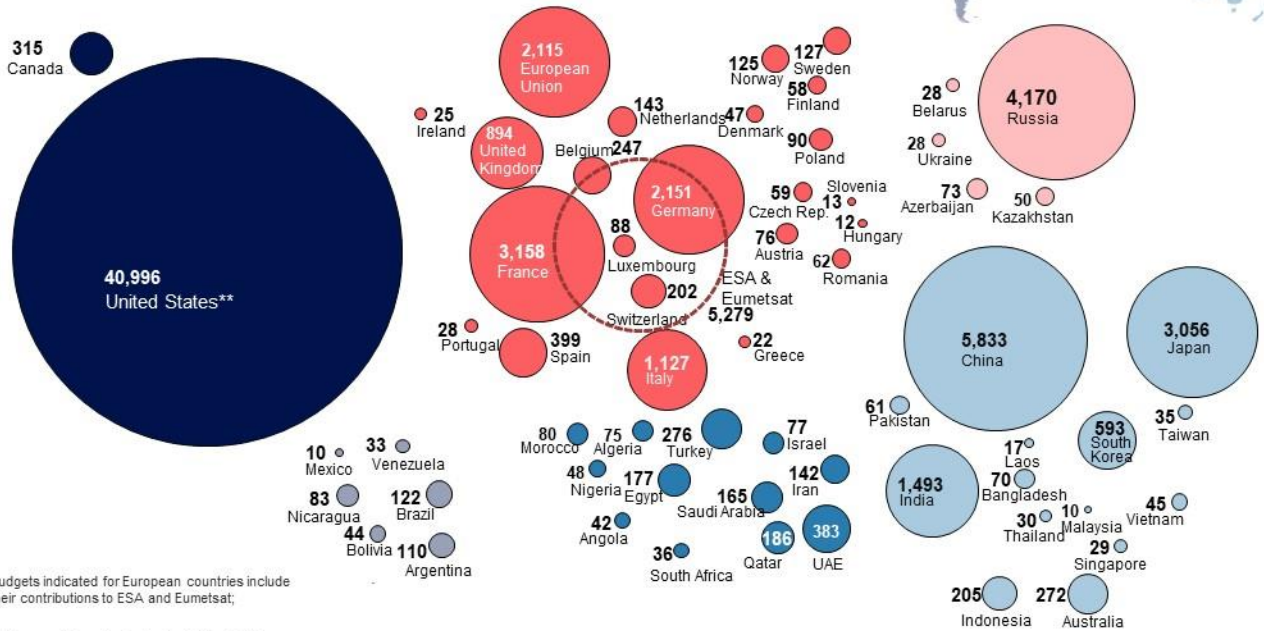


An extensive view of the activities and economics of government space programs

## Government Space Programs

Benchmarks, Profiles,  
& Forecasts to 2028

# WORLD GOVERNMENT EXPENDITURES FOR SPACE PROGRAMS (2018)\* TOTAL \$70.8 BILLION



Budgets indicated for European countries include their contributions to ESA and Eumetsat;

\* Only countries with a budget of at least \$10 million appear on the map.

\*\* The United States is undersized (80%)

Euroconsult | PROFILES OF GOVERNMENT SPACE PROGRAMS  
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Global government space budgets are in the early stages of a ten-year growth cycle with total world expenditures reaching \$70.9 billion in 2018, and forecasted to grow to \$84.6 billion by 2025. The report, which is trusted by hundreds of organizations around the world, provides important detail on how much investment is expected by region with profiles of space programs in 86 countries. It includes analysis of seven different application areas for each country including Earth observation, satellite navigation, space science and exploration, space security, communications, launch vehicles and manned spaceflight.

According to the research, the U.S. government continues to be the world’s largest investor in space programs, with China, Russia, France and Japan following in that order. The U.S. budget for space in 2018 totaled \$40.9 billion, 58 percent of the world market, down from 75 percent of the world market in the early 2000s. China solidified its second-place ranking, with an estimated \$5.83 billion budget, as it looks to commercialize and internationalize its space sector. Russia’s budget has decreased from its highs in 2013 and France tops European national spending and has overtaken Japan with the fourth largest government space budget in 2018.

Among other interesting findings, the research shows that growth drivers are reversing from the recent past, with defense budgets now expected to outpace civil budget expansion. The report shows that civil budgets worldwide will grow moderately at an average of 1.6 percent per year throughout the 2020s, driven largely by leading powers investing in science, exploration and manned flight. However, short-term budget growth will be fueled by defense programs in the U.S., Asia and the Middle East with an average of 4.2 percent annual increases until the mid-2020s.

Two records were broken in 2018, with more government satellites launched than ever before and more governments launching satellites. Going forward, the report estimates an average of 150 government satellites will be launched each year for the next decade.



# ABOUT GOVERNMENT SPACE PROGRAMS

## BENCHMARKS, PROFILES, & FORECASTS TO 2028

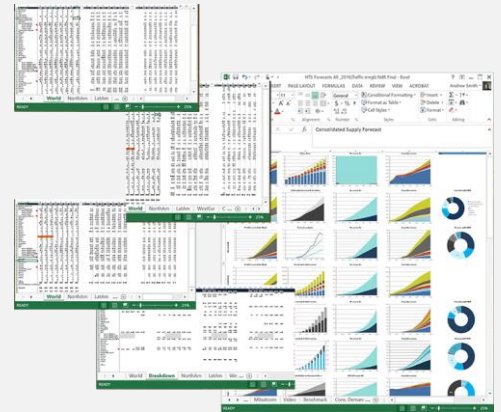
This report is a comprehensive assessment **covering countries investing** today or tomorrow in space as well as **all applications** they may undertake. Various sources of information are collected by Euroconsult on **government space programs and budgets** from government agencies' primary information, public sources, and estimates. This information is harmonized and processed to form a coherent set of data presented in this report.

### 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:

- ✓ Civil & defense organizations, assessed both jointly and separately
- ✓ Six world regions: North America, Latin America, Europe, Russia/CIS, Middle East & Africa, and Asia
- ✓ Detailed profiles of the 88 space programs, covering all countries and organizations (EU, ESA and EUMETSAT) currently investing in space
- ✓ Two time periods of reference: 2009-2018 for historical trends and 2019-2028 for forecasts

#### A MUST READ FOR:

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

#### COMPREHENSIVE PROGRAM PROFILES:

Policy & Strategic Objectives · Space Expenditures · Civil Space Programs  
Defense & Security Space Programs · Key Figures · Missions Road Map

#### KEY TRENDS, DRIVERS & FORECASTS FOR GOVERNMENT SPACE PROGRAMS

*Government Space Programs: Benchmarks, Profiles & Forecasts to 2028* is a reference for industry players & leaders around the globe. The report provides critical information for policy, business and strategic planning in the government space business, including:

- ✓ Strategic outlook containing global trends, forecasts and benchmarks by countries, regions and applications
- ✓ A detailed application review of current and future trends globally by countries and regions
- ✓ Detailed profiles of all 88 space programs



# TABLE OF CONTENTS

## INTRODUCTION

- Scope and definitions
- Acronyms
- Executive summary

## 1\ STRATEGIC OUTLOOK

- Global trends in space budgets
- Civil space programs
- Defense space programs
- Government satellites launched
- Space Applications
- Top 10 space countries
- Government space budgets

## 2\ PROFILES OF GOVERNMENT SPACE PROGRAMS

### 2.1 NORTH AMERICA

- Canada
- United states

### 2.2 SOUTH AMERICA

- Argentina
- Bolivia
- Brazil
- Chile
- Colombia
- Ecuador
- Mexico
- Nicaragua
- Paraguay
- Peru
- Venezuela

### 2.3 EUROPE

- Austria
- Belgium
- Bulgaria
- Czech Republic
- Denmark
- Estonia
- Eumetsat
- European Space Agency
- European Union
- Finland
- France
- Germany
- Greece
- Hungary
- Ireland
- Italy
- Lithuania
- Luxembourg
- The Netherlands
- Norway
- Poland
- Portugal
- Romania
- Slovakia
- Slovenia
- Spain
- Sweden
- Switzerland
- United Kingdom

### 2.4 RUSSIA & CIS

- Azerbaijan
- Belarus
- Kazakhstan
- Russia
- Turkmenistan
- Ukraine
- Uzbekistan





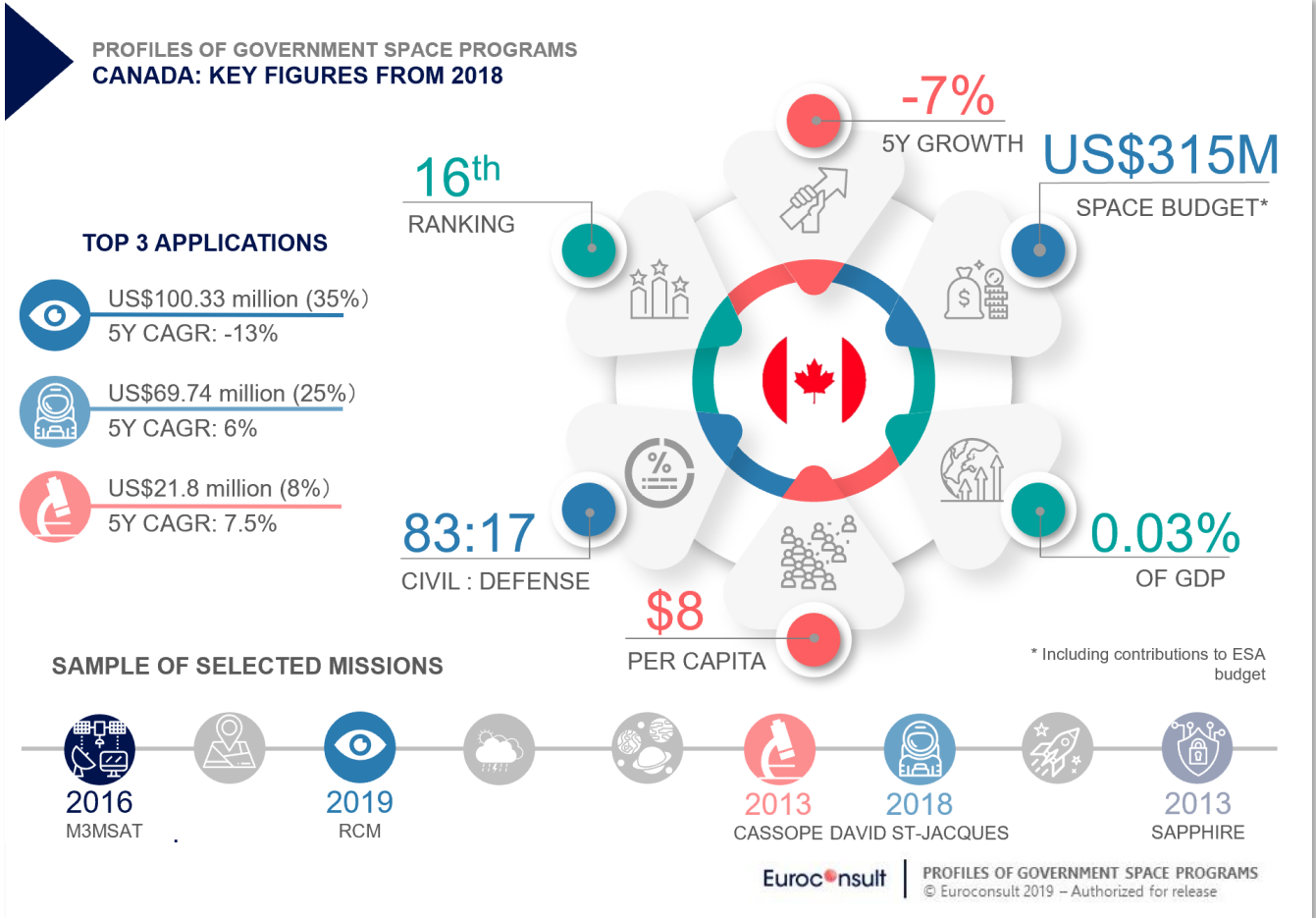
# TABLE OF CONTENTS - CONTINUED

## 2.5 MIDDLE EAST / AFRICA

- Algeria
- Angola
- Bahrain
- Egypt
- Ethiopia
- Gabon
- Ghana
- Iran
- Israel
- Kenya
- Morocco
- Nigeria
- Oman
- Saudi Arabia
- South Africa
- Tunisia
- Turkey
- United Arab Emirates
- Zimbabwe

## 2.6 ASIA

- Australia
- Bangladesh
- China
- India
- Indonesia
- Japan
- Laos
- Malaysia
- Mongolia
- Myanmar
- New Zealand
- Pakistan
- Philippines
- Singapore
- South Korea
- Taiwan
- Thailand
- Vietnam



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