PROSPECTS FOR THE SMALL SATELLITE MARKET

2017 Edition | A Euroconsult Executive Report

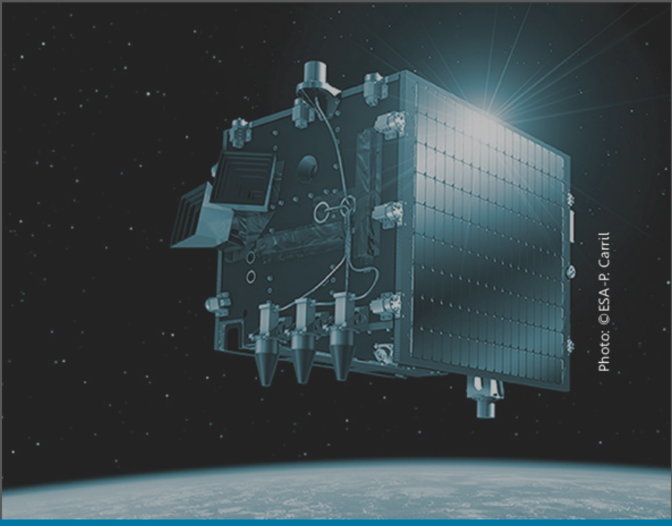
A global supply and demand analysis of government and commercial satellites up to 500 kg from the world leading supplier of research in the satellite sector.

- ✓ **70 pages, including numerous graphs & tables**
- ✓ **Thousands of data points**
- ✓ **Price starting at € 4,000**

Significant expansion in terms of capabilities and demand is underway in the smallsat market. Over 6,200 smallsats are expected to be launched over the next ten years, a substantial augmentation over that of the previous decade (several mega constellations are now included within the scope of this report). The smallsat market from 2017-2026 will be driven by the roll-out of multiple constellations accounting for more than 70% of this total, mainly for commercial operators.

The total market value of these smallsats could reach $30.1 billion in the next ten years, up from $8.9 billion over the previous decade. The smallsat market has quickly expanded over the last five years and will experience a sustained expansion in the future. Constellations' demand is more cyclical with strong variations driven by deployment in batches whereas demand for single satellite missions is more stable. Improvements in performance also change the shape of the satellite; miniaturization is a continuous process which gives customers the choice between lighter satellites with the same capabilities or heavier, more powerful satellites. In the heaviest mass category, smallsats are now able to perform missions that in the past were only achievable by satellites heavier than 500kg.

Of the total $16.5 billion manufacturing market value from 2017 to 2026, $3.7 billion is absorbed internally by in-house manufacturing; the remaining $12.8 billion is considered part of the open market. Over the period of the study (from 2007 to 2026), there is a clear divide in the typology of manufacturers of smallsats: In-house company and academia manufacturing rests in the realm of less than 50kg, while dedicated integrating companies comprise the realm of 50kg and higher. Considering the number of satellites that are being manufactured in-house or are captive to domestic manufacturers where tenders are not open to foreign bidders, the market potential for third-party industry does not comprise the entire market value.



ABOUT SMALLSATS

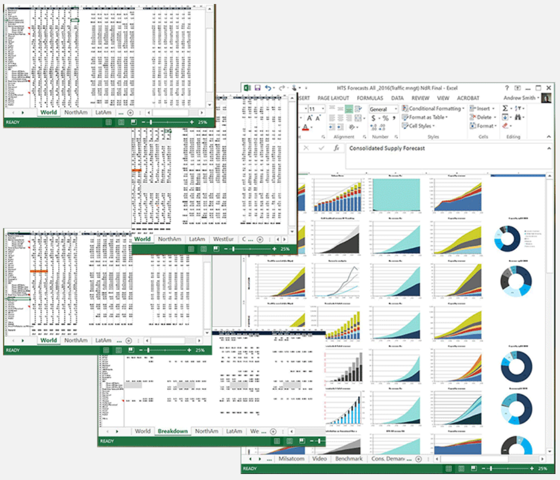
Prospects for the Small Satellite Market presents the various factors that will drive/inhibit growth in demand for small satellites over the next 10 years. This report considers satellites by four mass categories, six regions, six satellite applications and five manufacturer typologies.

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:

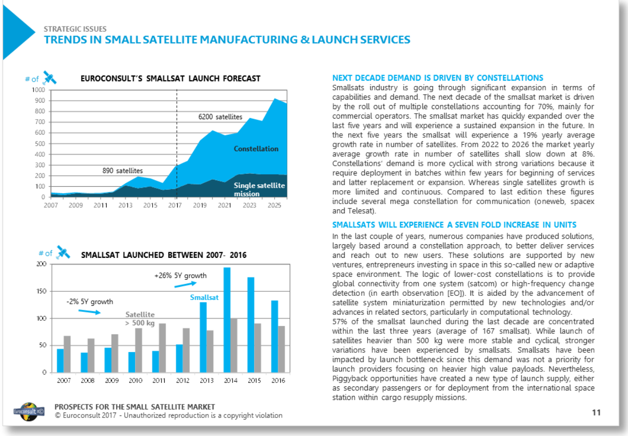
The forecast of smallsats to be launched over the next 10 years (2017-2026) has been built on the basis of a qualitative and quantitative analysis conducted from two sources:

- ✓ A dedicated database with all satellites between 1kg and 500kg of launch mass that have been launched between 2007 and 2016 and are now in development or forecast to be launched between 2017 and 2026. The database is critical for characterizing the changes in demand for smallsats over the next decade.
- ✓ A combination of primary and secondary research to characterize the changes that have occurred and that may occur in the industry, including different funding bodies of smallsats systems (civilian, defense and commercial organizations) and the industry structure to support these evolutions in both satellite manufacture and launch.

REPORT STRUCTURE

ANALYSIS

REFERENCE INDICATORS



WHO WILL BENEFIT FROM THIS REPORT:

- ✓ Satellite integrators
- ✓ Launch vehicle manufacturers & service providers
- ✓ Satellite & launch vehicle equipment companies
- ✓ Space agencies

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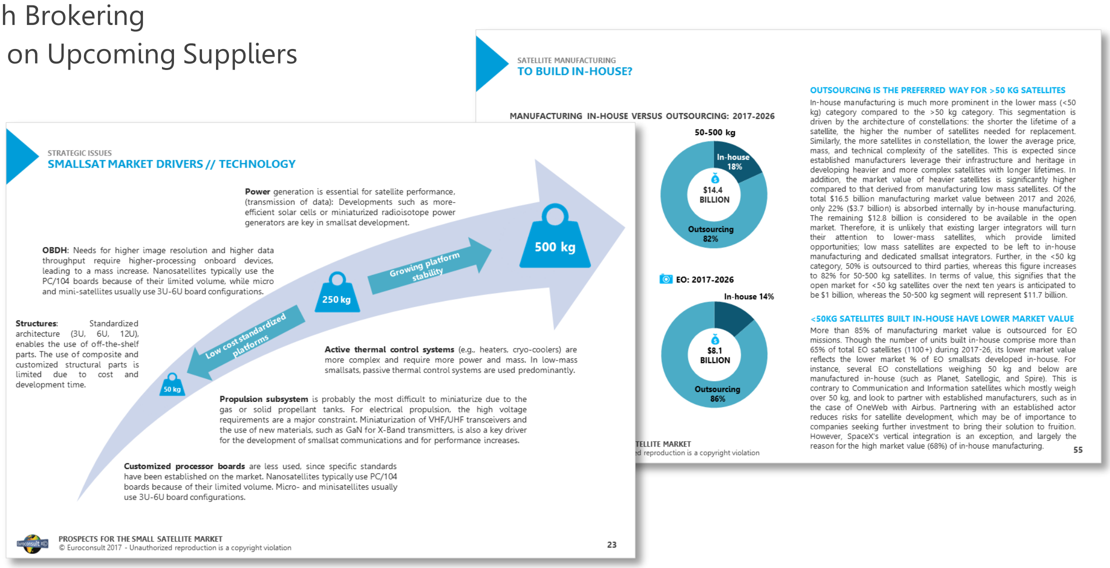

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