

# Satellite and Spacecraft Subsystem Market - A Global and Regional Analysis: Focus on End User, Satellite Subsystem, Launch Vehicle Subsystem, Deep Space Probe Subsystem, and Country - Analysis and Forecast, 2023-2033

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## Abstracts

### Introduction to Global Satellite and Spacecraft Subsystem Market

The global satellite and spacecraft subsystem market has experienced remarkable growth in recent years due to the increasing advancements in technology and the emergence of new applications. This growth is primarily driven by the commercial space industry, which has demonstrated its continuous expansion and robust growth, with record-breaking numbers of satellite launches and a significant increase in the overall number of active satellites in orbit. According to the BIS Research, in 2022, 2,243 commercial satellites were successfully deployed into orbit, marking a remarkable increase of over 32 percent compared to 2021. Additionally, the market is driven by the rising adoption of the increasing demand for artificial intelligence in space. By leveraging AI in satellite and spacecraft subsystems testing and deployment, engineers and operators can enhance performance, improve reliability, and optimize operational efficiency. The utilization of AI technologies can lead to more advanced and capable subsystems, enabling the successful execution of missions and the realization of the full potential of satellite and spacecraft operations. Notable companies include Airbus S.A.S., Lockheed Martin Corporation, Northrup Grumman, Date Device Corporation, and among others. These companies heavily invest in research and development to introduce innovative and advanced subsystems. The market can be segmented based on end users, satellite subsystem, launch vehicle subsystem, and deep space probe subsystem, and it is expected to witness continued growth as key players and government space agencies invest in advanced technologies to enhance performance

and effectiveness, leading to new opportunities for growth and innovation in the sector.

## Market Introduction

The global satellite and spacecraft subsystem market has witnessed significant growth and advancements in recent years. The growth of the space sector has been fueled by the emergence of innovative technologies, including reusable launch vehicles, SmallSats, and CubeSats. These advancements have made it more cost-effective to develop space systems and launch payloads into orbit, leading to increased participation from a wider range of organizations. The development of SmallSats and CubeSats has attracted the interest of private companies and government agencies by offering more affordable access to space and enabling new business models, such as satellite constellations. SmallSats, which accounted for approximately 95% of satellites launched in 2022, have played a significant role in expanding the industry's capabilities.

Furthermore, satellite constellations are expected to drive the space market during the forecast period. These constellations provide global or near-global coverage, ensuring that at least one satellite is available at any time and location on Earth. This continuous coverage is particularly valuable for applications such as telecommunications, Earth observation, and positioning systems, where uninterrupted connectivity and data acquisition are essential. The availability of satellite constellations opens new possibilities for a wide range of industries, including telecommunications, agriculture, climate monitoring, disaster response, and more.

## Industrial Impact

Increased investment from private industry has emerged as a significant driver of growth in the global satellite and spacecraft subsystem market. This surge in private sector investments has fostered heightened competition, innovation, and the emergence of new business models, such as mega constellations comprising hundreds or thousands of satellites in low Earth orbit (LEO) to deliver services such as low-latency broadband. It is anticipated that by the end of 2023, over 5,000 broadband satellites will be in LEO, providing high-speed internet to millions of subscribers across the globe. Private companies such as SpaceX, Blue Origin, and Relativity Space are actively investing in the development and commercialization of innovative technologies such as reusable launch vehicles.

## Market Segmentation:

## Segmentation 1: by End User

Commercial

Civil Government

Defense

Academic/Research Group

### Commercial Segment dominates the Global Satellite and Spacecraft Subsystem Market (by End User)

The global satellite and spacecraft subsystem market was led by the commercial end user, generated \$27,778.0 million in 2022, and is expected to reach \$43,686.6 million in 2033 at a CAGR of 3.61% during the forecast period 2023-2033. The demand for satellite communication services is surging in the commercial sector. Companies require reliable and efficient communication systems for a wide range of applications, including broadband internet services, telecommunication networks, and data transfer. These services heavily rely on satellite and spacecraft subsystems for signal transmission, data processing, and reception. Furthermore, the trend toward small satellites, including CubeSats and nanosatellites, is particularly prominent in the commercial space sector. These smaller satellites offer cost-effectiveness and rapid deployment opportunities for various applications.

## Segmentation 2: by Satellite Subsystem

Payload

Electrical and Power Subsystem

Command and Data Handling System

Communication Subsystem

Thermal Control Subsystem

Attitude Determination and Control Subsystem

Propulsion System

Mechanism

Actuator

Structure

### Payload Segment Leads the Global Satellite and Spacecraft Subsystem Market (by Satellite Subsystem)

The global satellite and spacecraft subsystem (satellite subsystem) market is expected to be dominated by the payload in 2023. Payloads are critical components of satellites that carry instruments and equipment used to collect and process data for various applications. As the demand for satellite-based data and services continues to grow across sectors such as communication, Earth observation, weather monitoring, navigation, and scientific research, the need for advanced and specialized payloads increases. Additionally, as governments, businesses, and research institutions increasingly rely on satellite data for decision-making, the demand for such payloads rises significantly.

### Segmentation 3: by Launch Vehicle Subsystem

Structure

Avionics

Propulsion System

Control System

Electrical System

Stage Separation

Thermal System

## Segmentation 4: Deep Space Probe Subsystem

Orbiter, Lander, and Rover

Onboard Computer, Microprocessor, and Controller

Power Source (Power management, Solar Panel, Batteries, Convertors)

Memory and Solid-State Recorder

FPGA and ASIC

Transmitter and Receiver and Antennas

Sensors

## Segmentation 5: by Region

North America - U.S. and Canada

Europe - U.K., France, Germany, Russia, and Rest-of-Europe

Asia-Pacific - China, India, Japan, and Rest-of-Asia-Pacific

Rest-of-the-World - Latin America and Middle East and Africa

North America is anticipated to grow at a CAGR of 3.02%. The presence of a larger number of established satellite and spacecraft subsystem providers is driving the market in the region. The presence of major industry players such as Northrop Grumman, Teledyne Technologies, Texas Instrument, Data Device Corporation, and Microchip Technology Inc. within the region with growth strategies such as partnerships are paving the way for market opportunities. Additionally, the strategic adoption of 3D printing technology by the U.S. companies in this sector is a deliberate choice. By leveraging 3D printing, these companies can reduce satellite and spacecraft complexity while enhancing the overall manufacturability of satellite and spacecraft subsystems.

The U.S. dominates the global satellite and spacecraft subsystem market in the region, with various key players dedicated to developing rockets that are specifically designed to meet the requirements of commercial enterprises and government organizations involved in launching payloads into low Earth orbit (LEO), medium Earth orbit (MEO), geostationary equatorial orbit (GEO), and beyond.

### Recent Developments in the Global Satellite and Spacecraft Subsystem Market

In June 2023, OHB Sweden, a subsidiary of the space and technology group OHB SE, and Thales Alenia Space signed an agreement to undertake the design, manufacturing, integration, testing, and delivery of a propulsion system for two important ESA/EU Copernicus missions, namely CHIME and ROSE-L. Furthermore, the ROSE-L mission would facilitate various applications, contributing to various fields such as agriculture, environmental monitoring, food security, and hazard management.

In June 2023, SpaceLogistics, a wholly owned subsidiary of Northrop Grumman, entered into a purchase agreement with Intelsat, a prominent communications satellite operator. As part of this agreement, SpaceLogistics' Mission Robotic Vehicle (MRV), a spacecraft equipped with robotic arms, would install the Mission Extension Pod (MEP) on an Intelsat communications satellite in geosynchronous Earth orbit (GEO). This installation would effectively extend the satellite's operational life by a minimum of six years.

In June 2023, Telstra and OneWeb signed an agreement to implement one of the world's largest rollouts of OneWeb's low Earth orbit (LEO) backhaul for a commercial mobile network. Following successful testing in Australia, Telstra and OneWeb reached a commercial agreement and would begin transitioning hundreds of existing remote mobile base stations, which currently rely on satellite backhaul, to OneWeb's LEO solution starting by the end of 2023. Additionally, Telstra plans to utilize OneWeb's LEO services for future sites where satellite backhaul is the preferred or only viable option.

In May 2023, Lockheed Martin Corporation is a part of the winning team that secured a contract from NASA to develop and demonstrate a human landing system as part of the agency's Human Landing System program, which is a crucial component of the Artemis program. The program's primary objective is to swiftly create a sustainable lunar lander capable of safely transporting astronauts to the lunar surface.

### Demand – Drivers and Limitations

## Market Drivers: Increasing Research and Development Activities for Developing Cost-Efficient Sub-System and Component

The production and launch of communication and Earth observation satellites are witnessing a rapid escalation. The manufacturing and deployment of these satellites for communication and Earth observation purposes are experiencing a substantial increase, resulting in the manufacturing of cost-effective satellite subsystems and components. In addition, in response to the demand for cost-efficient solutions, there has been an increase in research and development activities focused on developing cost-effective subsystems and components.

## Market Challenges: Impact of Space Radiation on Spacecraft and Astronauts

Space radiation poses a significant concern not only during the journey to and from space but also while orbiting Earth. Within Earth's vicinity, there exist hazardous radiation belts known as the Van Allen belts, which consist of highly charged particles trapped by the planet's magnetic fields. Prolonged exposure to these belts increases the risk of radiation poisoning. The Van Allen Belts consist of two main radiation rings. The first ring starts approximately 600 km above Earth's surface and extends up to 6,000 km. The second, more perilous ring spans from around 10,000 to 65,000 km above the planet. In June 2019, NASA's Space Environment Testbeds (SET) embarked on a mission to study and enhance the protection of satellites in space. The primary focus of SET is to investigate the space environment.

## Market Opportunities: Growing Developments for Cislunar Programs

The potential of cislunar space holds significant opportunities for the advancement of science, technology, and exploration. Cislunar space offers distinct vantage points that allow for observation and exploration of the Earth-Moon system and beyond. Cislunar space encompasses five Lagrangian points, which are stable orbits in relation to the Earth and Moon. For instance, the James Webb Space Telescope, launched on December 25th, 2021, is positioned at the second Lagrange point (L2), enabling it to maintain alignment with the Earth as it orbits around the Sun. The first and second Lagrange points, L1 (always in front of the Moon) and L2 (always behind the Moon), present advantages for transport purposes.

How can this report add value to an organization?



**Product/Innovation Strategy:** The product segment helps the reader understand the different types of subsystems available for deployment and their potential globally. Moreover, the study provides the reader with a detailed understanding of the global satellite and spacecraft subsystem market based on satellite subsystem, launch vehicle subsystem, and deep space probe subsystem.

**Growth/Marketing Strategy:** The global satellite and spacecraft subsystem market has seen major development by key players operating in the market, such as contract, collaboration, and joint venture. The favored strategy for the companies has been contracted to strengthen their position in the global satellite and spacecraft subsystem market. For instance, in April 2023, Ball Aerospace, Loft Federal, and Microsoft announced their partnership in the Space Development Agency (SDA)'s experimental testbed program called National Defense Space Architecture Experimental Testbed (NExT). This program aims to launch 10 satellites carrying experimental payloads into orbit. Ball Aerospace took the lead in integrating and testing the payloads and spacecraft for this mission as the prime contractor.

**Competitive Strategy:** Key players in the global satellite and spacecraft subsystem market analyzed and profiled in the study involve major global satellite and spacecraft subsystem companies providing subsystems, respectively. Moreover, a detailed market share analysis of the players operating in the global satellite and spacecraft subsystem market has been done to help the reader understand how players stack against each other, presenting a clear market landscape. Additionally, comprehensive competitive strategies such as partnerships, agreements, and collaborations will aid the reader in understanding the untapped revenue pockets in the market.

**Methodology:** The research methodology design adopted for this specific study includes a mix of data collected from primary and secondary data sources. Both primary resources (key players, market leaders, and in-house experts) and secondary research (a host of paid and unpaid databases), along with analytical tools, are employed to build the predictive and forecast models.

Data and validation have been taken into consideration from both primary sources as well as secondary sources.

### Key Market Players and Competition Synopsis

The companies that are profiled have been selected based on thorough secondary research that includes analyzing company coverage, product portfolio, market



penetration, and insights, which are gathered from primary experts.

The top established satellite and spacecraft subsystem providers hold around 79% of the presence in the market. The start-ups in the market hold around 21% of the global satellite and spacecraft subsystem market.

#### Key Companies Profiled:

Airbus S.A.S.

Ball Aerospace

Data Device Corporation

Honeywell International

Israel Aerospace Industries

Lockheed Martin Corporation

Mitsubishi Electric Corporation

Northrop Grumman

OneWeb

OHB System

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