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# Space-qualified Propellant Tank Market - A Global and Regional Analysis: Focus on Platform, End User, Material Type, Manufacturing Process, Propellant Tank and Country - Analysis and Forecast, 2021-2031

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## Abstracts

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Market Report Coverage - Space-qualified Propellant Tank

Market Segmentation

Platform: Satellite, Launch Vehicles

End User: Government and Military, Commercial

Material: Carbon Fiber, Aluminium and Titanium Alloys, Thermoset and Thermoplastic, Nanomaterials, Others

Manufacturing Process: Automated Fiber Placement (ATL/AFP), Compression Molding, Additive Manufacturing, Conventional Manufacturing, Others

Propellant Tank Type: Diaphragm Tanks, Propellant Management Devices, Helium, Nitrogen, and Xenon Tanks, Aluminium Alloy Tanks

Regional Segmentation

North America: U.S., Canada

Europe: Germany, U.K., France, Russia, Rest of Europe

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

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

Market Growth Drivers

Rapid Escalation of the Production and Launch of Satellites

Rising Research and Development Activities to Develop Cost-Efficient Propellant Tank for Satellites and Launch Vehicles

Market Challenges

High Cost Associated with Large Space-qualified Propellant Tank

Market Opportunities

Growing Developments for Deep Space Exploration Programs

Key Companies Profiled

Airbus S.A.S, Adam Works, Ariane Group, Busek Co Inc., Cobham Mission System, Infinite Composites Technologies, IHI Aerospace Co., Lockheed Martin Corporation, Microcosm, Inc., Moog Inc., OHB SE, Northrop Grumman Corporation, Nammo AS, Peak Technology, Stelia Aerospace North America Inc.

How This Report Can Add Value

This exclusive report on space qualified propellent tank market will help you with:

A dedicated section focusing on the futuristic trends adopted by the key players operating in the global space-qualified propellant tank market.

Extensive competitive benchmarking of top 15 players (including OEMs and component providers) offering a holistic view of the global space-qualified propellant tank landscape

Detailed qualitative and quantitative mapping of satellites and launch vehicles from 2020-2031.

Qualitative and quantitative analysis of space-qualified propellant tank at the region and country-level granularity by application and product segments.

Market by Product: Analysis and Forecast: The product segment helps the reader in understanding the different types of space-qualified propellant tank and their market potentials globally. Moreover, the study provides the reader a detailed understanding of space-qualified propellant tank with respect to platform type (satellite, launch vehicle), end user (government and military, commercial), material (carbon fiber, aluminum and titanium alloys, thermoset and thermoplastic, nanomaterials, and others), manufacturing process (automated fiber placement, compression molding, additive manufacturing, conventional manufacturing), propellant tank type (diaphragm tanks, propellant management devices, helium, nitrogen, and xenon tanks, and aluminum alloy tanks).

Market by Application: Analysis and Forecast: The space qualified propellent tank market by application is majorly driven by end user applications, including government, military, and commercial uses. For instance, in January 2021, Airbus and Thales signed a contract with the European Commission of $1.79 billion for the development of 12 satellites. Both the companies would provide end-to-end solutions in manufacturing these satellites.

Similarly, in April 2020, Infinite Composite Technologies introduced the first-ever spherical Type V cryotank for storing the cryogenic propellants for launch vehicles and spacecraft such as lunar landers.

Key Questions Answered in the Report

What are the futuristic trends in this market, and how is the market expected to change over the forecast years, 2021-2031?

What are the key drivers and challenges faced by the companies currently

working in the global space-qualified propellant tank market?

How is the space-qualified propellant tank market expected to grow during the forecast period 2021-2031?

What are the opportunities for the companies to expand their businesses in the global space-qualified propellant tank market?

Which region is expected to lead the global space-qualified propellant tank market by 2031?

What are the key developmental strategies implemented by the key players to sustain in this highly competitive market?

What is the current and future revenue scenario of this market?

What is the competitive scenario of the key players in the global space-qualified propellant tank market?

What are the emerging technologies that the key companies are focusing on to increase their market share?

What are the strengths and weaknesses of the companies that are influencing the growth of the market?

Space-qualified Propellant Tank

Propellant tanks are used in satellites and launch vehicles for storing liquid fuels. Additionally, a cryogenic rocket propellant tank (cryo-tank) is used for storing fuel or oxidizer of rocket stages. The upcoming space heavy lift launch vehicles demand extremely excessive propellant mass fractions to obtain the designed performance set by the existing metallic tanks. This is driving companies to develop lightweight propellant tanks.

Between 1957 and 2021, many governments and commercial organizations such as Infinite Composite Technologies, Ariane Space, Europe Space Agency (ESA), National Aeronautics and Space Administration (NASA), and Japan Aerospace Exploration Agency (JAXA), started demonstrations for new propellant tank for different satellites

and launch vehicles. Since then, the technology has evolved continually and transformed the entire space industry by developing unique products and systems.

Currently, many space agencies and commercial companies across the globe have been focusing on developing satellite constellations. This is expected to drive the market for the propellant tank system.

Space-qualified Propellant Tank Industry Overview

The global space-qualified propellant tank market is expected to reach $3,069.5 million by 2031, with a CAGR of 4.83% during the forecast period 2021-2031. The rapid escalation of the production and launch of satellites is expected to be the major driving factor for the market. In addition, rising demand for building efficient propellant tanks at low cost are key drivers for the growth of the global space-qualified propellant tank market.

Market Segmentation

Space-qualified Propellant Tank Market by Platform

The satellite platform segment is estimated to dominate the global space-qualified propellant tank market due to the rising development of satellite constellations for communication, Earth observation, navigation, and tracking purposes.

Space-qualified Propellant Tank Market by End User

The commercial end user segment is estimated to dominate the global space-qualified propellant tank market due to the rising development of small satellite constellations for communication, remote sensing, Earth observation, and navigation by commercial industries.

Space-qualified Propellant Tank Market by Material

Carbon Fiber material is the most prominent material contributing to the global space-qualified propellant tank market. The space industry has been using carbon fiber composites for manufacturing satellite structures and launch vehicle structures. For instance, for NASA’s Artemis Program Space Launch System (SLS), a heavy launch vehicle, rocket parts were manufactured using the automated fiber placement (AFP) machine. These rocket parts comprised sandwich structures of more than eight meters

in diameter made of carbon fiber skins with an aluminum honeycomb core.

Space-qualified Propellant Tank Market by Manufacturing Process

Space will continue to be a major source of applications for compression molded composite parts. Compression molding using BMC is an enabling technology for the fabrication of complex composite parts for aerostructures, space, and satellites.

Space-qualified Propellant Tank Market by Propellant Tank Type

With the growing number of space-qualified propellant tanks, it is anticipated that the requirement for diaphragm tanks will grow in the upcoming years. The tanks are light in weight, reliable, and manufactured at low cost, which has proliferated their use in the aerospace sector over the years. The tanks are replacing titanium propellant tanks that were previously used for spacecraft application due to low cost and simple design.

Space-qualified Propellant Tank Market by Region

North America is expected to account for the highest share of the global space-qualified propellant tank market, owing to a significant number of companies based in the region, increased spending by government and commercial organizations such as the National Aeronautics and Space Administration (NASA), Lockheed Martin, Ariane Group, Northrop Grumman, Microcosm, and Stelia Aerospace North America for space-qualified propellant tank.

Key Market Players and Competition Synopsis

Some of the key players operating in the market include Airbus S.A.S, Adam Works, Ariane Group, CU Aerospace, Northrop Grumman Corporation, Nammo AS, OHB SE, Peak Technology, and Stelia Aerospace North America Inc., among others.

The companies profiled in the report have been selected post-in-depth interviews with experts and understanding details around companies such as product portfolios, annual revenues, market penetration, research and development initiatives, and domestic and international presence in the space-qualified propellant tank market. Accordingly, a structured approach has been followed, which includes segmenting the pool of players under three mutually exclusive and collectively exhaustive parts, holding a 100% pie of the market, as mentioned below:

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Top Segment Players - These are leading original equipment manufacturers (OEMs), covering ~90% of the presence in the market.

Other Segment Players – These are component providers, covering ~10% of the presence in the market.

However, if a company is not part of the above pool, it has been well represented across different sections of the report (wherever applicable).

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