

Sub-Orbital Testing Services Market - A Global and Regional Analysis: Focus on Payload Capacity, Application, End User, and Country - Analysis and Forecast, 2022-2032

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Abstracts

Global Sub-Orbital Testing Services Market Overview

The global sub-orbital testing services market is estimated to reach \$178.1 million in 2032 from \$122.4 million in 2022, at a CAGR of 3.82% during the forecast period 2022-2032. The sub-orbital testing service providers have witnessed the demand from the government, research institutions, and growing commercial industry.

Market Lifecycle Stage

The sub-orbital testing services has a long history as government agencies have been using sub-orbital platforms such as sounding rocket to test payload at higher altitude. So, the sub-orbital testing services market was mostly dominated by the end users such as the National Aeronautics and Space Administration (NASA) and European Space Agency (ESA).

Furthermore, in recent years the sub-orbital testing services market has witnessed commercial applications, and private companies have shown their interest in sending their technologies to be tested in the near space environment. Additionally, research institutions and colleges are the major end user that are utilizing the sub-orbital testing services as the government agencies are providing support through its programs such as NASA's Flight Opportunities.

In recent years, the sub-orbital testing services market has witnessed commercial

players offering reusable sub-orbital platforms, such as Blue Origin and Virgin Galactic. These platforms can conduct multiple flights with just minor refurbishment required. Hence, the sub-orbital testing services market has emerged with the capability of serving more sub-orbital missions.

Furthermore, the rise in the deployment of small satellites in low Earth orbit (LEO) will generate demand in the sub-orbital testing services market. The small satellites use many commercial-off-the-shelf (COTS) subsystems and components that are usually not space qualified. So, satellite manufacturers/operators will utilize sub-orbital testing services to validate their products.

Impact

The global sub-orbital testing services market is observing rising demand across various end users, which drives the development of investments across the sub-orbital launch vehicle platforms. The major challenge in the sub-orbital testing services market is the expensive sub-orbital launches and time-intensive testing process. This leads to fewer customers utilizing the sub-orbital services. Hence, the reusability of sub-orbital platforms can bring down the cost. However, as only some key companies are offering reusable sub-orbital platforms, the pricing power is with service providers owing to less competition.

Furthermore, in the upcoming years, more companies will enter the sub-orbital market and reduce the sub-orbital testing service launch cost. Additionally, the emerging deployment of small satellites will increase the demand for sub-orbital testing services, especially the 1-50 kg satellite mass segment. The 1-50 kg satellites use maximum COTS subsystems and components, which generally are not space qualified. So, the sub-orbital testing service providers will experience greater demand in the forecast period 2022-2032.

Market Segmentation:

Segmentation 1: by Payload Capacity

1-50 Kg

51-200 Kg

201-500 Kg

501 Kg and Above

Segmentation 2: by Application

Human-Tended

Automated

Segmentation 3: by End User

Government

Commercial

Defense

Research Institutions

Segmentation 4: by Region

North America - U.S. and Canada

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

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

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

North America is expected to dominate the global sub-orbital testing services market during the forecast period. The factor attributing to the growth of this region is the high presence of the key companies highly engaged in developing and demonstrating sub-orbital testing services capabilities in the region.

Recent Developments in Global Sub-Orbital Testing Services Market

Sub-Orbital Testing Services Market - A Global and Regional Analysis: Focus on Payload Capacity, Application,...

In November 2022, Virgin Galactic signed an agreement with Axiom Space, a commercial space company, to provide microgravity research and training. The company would provide Axiom's astronauts a trip to the sub-orbit region to train them for future long-duration space missions.

World View Enterprises, Inc, under collaboration with the National Aeronautics and Space Administration (NASA), will provide high-altitude balloon services to the winner of NASA's TechRise Student Challenge. The company will carry students' scientific/technology experiments to the edge of space on its stratospheric balloon platform.

In July 2022, Virgin Galactic signed a contract with Boeing Subsidiary Aurora Flight Sciences to partner in developing the company's new motherships. The Aurora Flight services would build the two motherships capable of conducting 200 launches a year, carrying Virgin's Spaceship to an altitude of 50,000 and releasing it.

Demand - Drivers and Limitations

Following are the drivers for the global sub-orbital testing services market:

Need for Microgravity Testing Services

Limitations of Terrestrial Testing Service Capabilities

Following are the challenges for the global sub-orbital testing services market:

Expensive Sub-Orbital Flight

Time Intensive Testing Process

Safety Concerns Associated with Impact Landing

Policy Challenges for Sub-Orbital Flights

Following are the opportunities for the global sub-orbital testing services market:

Companies Offer Human-Tended Sub-Orbital Research

How can this report add value to an organization?

Product/Innovation Strategy: The service segment helps the reader understand the different end users that will generate the demand for sub-orbital testing services globally. Moreover, the study provides the reader with a detailed understanding of the different sub-orbital testing services market based on payload capacity (1-50 kg, 51-200 kg, 201-500 kg, and 501 kg and above), application (automated and human-tended), and end user (government, commercial, defense, and research institutions).

Growth/Marketing Strategy: The global sub-orbital testing services market has seen major development by key players operating in the market, such as business expansion activities, contracts, mergers, partnerships, collaborations, and joint ventures. The favored strategy for the companies has been contracted to strengthen their position in the global sub-orbital testing services market. For instance, in November 2021, Aerostar received a contract from the U.S. Department of Defense (DoD) for its Defense Innovation Unit (DIU) to provide high-altitude platform solutions. The company will demonstrate the applications of stratospheric balloons for the DoD's real-time military field operational needs.

Competitive Strategy: Key players in the global sub-orbital testing services market analyzed and profiled in the study involve sub-orbital testing service providers. Moreover, a detailed competitive benchmarking of the players operating in the global sub-orbital testing services 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 contracts, partnerships, agreements, acquisitions, and collaborations will aid the reader in understanding the untapped revenue pockets in the market.

Key Market Players and Competition Synopsis

The companies that are profiled have been selected based on inputs gathered from primary experts and analysis of the company's coverage, product portfolio, and market penetration.

The top segment players leading the market include established players of sub-orbital testing services that constitute 69% of the presence in the market. Other players include

start-up entities that account for approximately 31% of the presence in the market.

Key Companies Profiled

Aerostar

Blue Origin

bluShift Aerospace, Inc.

Dawn Aerospace

Equatorial Space Inc.

Exos Aerospace Systems & Technologies, Inc.

Interstellar Technologies Inc.

Near Space Corporation

PD AeroSpace, LTD

PLD Space

Skyrora Limited

SpinLaunch

UP Aerospace

Virgin Galactic

World View Enterprises, Inc

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