

Global Space Situational Awareness (SSA) Services Market 2023

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Abstracts

The global satellite commercial-off-the-shelf (COTS) components market is projected to reach \$2.03 billion by 2029, growing at a CAGR of 0.9% from 2023 to 2029. This growth is fueled by technological advancements in electronic components for IoT services and the increasing demand for satellite-based connectivity in communication, navigation, and Earth observation. The global space economy, valued at \$371 billion in 2020, is expected to further expand due to factors like small satellite launches, satellite internet services, and technological innovations. Commercial-off-the-shelf components are crucial in the space industry but require rigorous testing due to radiation impacts.

Satellite manufacturers have shifted focus to small satellites, driving advancements in satellite electronics. COTS components meet the demand for low-cost and fast services and are used to reduce costs and development time. Ongoing projects aim to produce advanced COTS components with enhanced radiation shielding capabilities. The market for COTS components is well-established as satellite operators seek quick and cost-effective deployment.

The increasing number of satellites, including mega-constellations, in low Earth orbit drives the demand for COTS components. Reconfigurable satellite payloads and standardized platforms present challenges and opportunities for the market. The growth of IoT-enabled services and the development of advanced COTS components offer potential for the industry.

Market Segmentation

The market is segmented based on various factors, including mass class, subsystem, and region.

Segmentation by Mass Class

0-500kg
501-1,000kg
1,001kg and above

Segmentation by Subsystem

Payload
Electrical and Power Subsystem
Command and Data Handling System
Communication Subsystem
Thermal Control Subsystem
Attitude Determination and Control Subsystem
Propulsion Control Subsystem
Mechanism
Actuator

Segmentation by Region

North America - U.S. and Canada
Europe - France, Germany, Russia, U.K., and Rest-of-Europe
Asia-Pacific - China, Japan, India, and Rest-of-Asia-Pacific
Rest-of-the-World - Middle East and Africa and South America

The global market for satellite commercial-off-the-shelf (COTS) components is projected to be dominated by the 0-500kg mass class segment during the forecast period. This is due to the increasing demand for satellites serving applications such as Earth observation, weather forecasting, navigation, and communication. The rise of small satellite manufacturers also drives the need for reconfigurable and commercial off-the-shelf electronic components. The 0-500kg segment is expected to contribute the largest share in terms of revenue generation, followed by the 1,001kg and above segment. The 0-500kg segment is projected to grow at a CAGR of 1.2%, while the 1,001kg and above segment is anticipated to become the second dominant segment by 2029.

In the subsystem category, the attitude determination and control subsystem are expected to dominate the market with a 35.4% share in 2029. The command and data handling system segment will be the second dominant subsystem, with a growth rate of 0.5% during the forecast period.

North America currently holds the highest market share of 70.3% in the global satellite commercial-off-the-shelf components market, thanks to the presence of numerous

companies in the region. Europe accounted for a share of 20.7% in 2022 and is expected to witness significant growth, driven by space activities in countries like the U.K., France, Germany, and Russia. Increased spending by commercial space organizations and government key agencies across various mass classes will contribute to the substantial growth of the satellite commercial-off-the-shelf components market in the forecast period.

Competitive Landscape

The global market for commercial-off-the-shelf components in satellites features a competitive landscape where key players employ various strategies to enhance their market share. These strategies include contracts, partnerships, acquisitions, product innovation, and business expansion. Notable participants in this market are Analog Devices, Microchip Technology, Micropac, and BAE Systems. These companies aim to extend their operations, strengthen their global market presence, generate revenue, and attract new customers through partnerships, collaborations, agreements, and contracts. Other key companies profiled in this report include Amplified Design Solutions, Cobham Plc, Curtiss-Wright, Data Device Corporation, Exxelia, GSI Technology, Honeywell International, Infineon Technologies, Mercury Systems, STMicroelectronics N.V., Texas Instruments, Vorago Technologies, and Xilinx, Inc.

Recent Industry Developments

Cobham Advanced Electronic Solutions announced its partnership with Lockheed Martin Space in March 2022 to develop advanced phased array antennas for satellite missions using additive manufacturing technology.

In February 2022, Cobham Advanced Electronic Solutions collaborated with Trident Systems to provide integrated advanced communications solutions and mission computing capabilities for defense applications in air, space, land, and sea domains.

Microchip expanded its gallium nitride (GaN) radio frequency (RF) power device portfolio in December 2021, introducing monolithic microwave integrated circuits (MMICs) and discrete transistors. These high-performance products are used in satellite communications, commercial radar systems, 5G technology, electronic warfare, and defense radar systems and test equipment.

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