

Global Spacecraft Electric Thruster Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Spacecraft Electric Thruster market size is expected to reach \$ 2143 million by 2032, rising at a market growth of 14.4% CAGR during the forecast period (2026-2032).

Spacecraft Electric Thruster refers to an in-space propulsion device installed on satellites, deep-space probes, orbital transfer vehicles, servicing spacecraft and other space platforms that converts onboard electrical power into propulsive energy by heating, ionizing or electrically accelerating a propellant. The study primarily covers Hall-effect and HEMPT thrusters, gridded ion thrusters, FEEP and electrospray thrusters, electrothermal thrusters, pulsed-plasma and vacuum-arc thrusters, RF or electrodeless plasma thrusters, and other established electric-propulsion architectures. Key technical parameters include input power, thrust, specific impulse, efficiency, total impulse, operating lifetime, restart capability, propellant type, mass and volume. Product selection depends strongly on spacecraft power availability, required delta-v, mission duration and maneuver profile. Spacecraft Electric Thruster products are principally deployed for orbit raising, station keeping, constellation phasing, formation flying, collision avoidance, end-of-life deorbiting, GEO orbit control, orbital transfer and deep-space exploration, with product configurations ranging from sub-100-W micropropulsion devices to multi-kilowatt and emerging higher-power propulsion hardware.

Key Findings

In 2025, global Spacecraft Electric Thruster production reached approximately 9,433 Units. The average price is approximately \$86,000

Europe and North America maintain the deepest merchant supplier bases, while China is rapidly expanding batch manufacturing capacity

New industrial entrants are raising production scale, including a 2026 Hall-thruster line designed for more than 200 units annually

Market Trends

The Spacecraft Electric Thruster industry is moving from low-volume, mission-specific hardware toward a more industrialized market combining standardized platforms, faster qualification cycles and repeatable production. Hall-effect propulsion remains the mainstream commercial architecture, but suppliers are broadening technology and propellant portfolios through gridded-ion, FEEP, electrospray, water-based electrothermal, iodine-fed, RF-plasma and solid-metal plasma concepts. Product development is occurring simultaneously at both ends of the power spectrum: sub-kilowatt thrusters are becoming more capable for SmallSat orbit raising and deep-space missions, while multi-kilowatt and next-generation high-power electric propulsion is being developed for lunar logistics, orbital transportation and longer-range exploration. NASA's 2026 small-spacecraft technology review reflects continued progress toward more capable electric propulsion, while recent high-power research demonstrates that the technology envelope continues to expand. Another important structural trend is manufacturing industrialization, as specialist suppliers and vertically integrated spacecraft companies increasingly treat propulsion availability, production throughput and supply-chain control as strategic capabilities rather than purely technical parameters.

Market Dynamics

Drivers

Demand growth is being supported by a structural increase in spacecraft maneuverability requirements. Proliferated LEO constellations require orbit injection correction, phasing, station keeping, collision avoidance and controlled end-of-life disposal, while GEO platforms continue to use electric propulsion for orbit raising and station keeping because high propellant efficiency can materially reduce spacecraft and launch mass. Lunar, planetary and other high-delta-v missions provide a second demand pillar because electric propulsion enables long-duration maneuvers that are

difficult to achieve economically with conventional chemical propulsion. Space-sustainability requirements further strengthen the need for reliable maneuvering and disposal capability: ESA's Zero Debris approach targets substantially improved orbital sustainability by 2030 and is explicitly advancing active deorbiting and collision-avoidance capability for smaller spacecraft.

Restraints

The principal restraint is the inherent trade-off between propellant efficiency and thrust. Spacecraft Electric Thruster products generally require long operating periods to deliver substantial velocity changes, making them less suitable for missions requiring very high instantaneous acceleration. Performance is also constrained by available spacecraft electrical power, thermal-rejection capability and system-level integration. Long-duration life testing, vacuum qualification, erosion control, cathode durability and stable operation across changing power levels can extend development cycles and increase engineering expenditure. Mission customers place high value on flight heritage, which creates a material commercial barrier for new suppliers even when laboratory performance is competitive. In addition, specialized materials, high-vacuum test infrastructure and propulsion-system qualification can keep entry costs high and limit the speed at which early-stage manufacturers convert prototypes into repeatable flight hardware.

Opportunities

The most attractive opportunities are developing where spacecraft platforms require greater maneuverability without proportionally increasing propulsion mass. SmallSat and constellation architectures create demand for compact, standardized thrusters that can be manufactured at higher volumes, while orbital transfer vehicles and in-space servicing platforms require higher total impulse and flexible throttling. Alternative propellants such as krypton, argon, iodine, water, ionic liquids and solid metals provide additional opportunities to reduce storage complexity, sourcing risk or system cost relative to conventional xenon-centered architectures. VLEO applications may create a longer-term opportunity for atmosphere-breathing concepts, while lunar and deep-space transportation can support higher-power Hall, ion and electromagnetic propulsion. NASA's recent development activity in high-throughput sub-kilowatt Hall propulsion and high-power electromagnetic propulsion illustrates the widening performance range available to future commercial systems.

Challenges

The industry faces a difficult commercialization balance between performance, qualification reliability and manufacturing economics. Increasing satellite production does not translate directly into an equivalent merchant thruster opportunity because major spacecraft and constellation companies may vertically integrate propulsion to secure supply and reduce unit costs. This trend can intensify pricing pressure on independent suppliers and increase the importance of production yield, automated manufacturing and standardized qualification. At the same time, customers are reluctant to accept propulsion risk because a thruster failure can compromise spacecraft orbit, lifetime or disposal capability, making accumulated flight heritage a durable competitive advantage. Emerging suppliers therefore need to scale production without weakening traceability or mission assurance. Rapidly evolving propulsion architectures also create technology-selection risk: suppliers must invest in Hall, ion, electrothermal or alternative plasma technologies before future satellite power architectures, propellant preferences and constellation procurement patterns are fully established. Rocket Lab's decision to establish an in-house Hall propulsion product and high-volume line illustrates the competitive implications of this vertical-integration trend.

Industry Chain Analysis

The Spacecraft Electric Thruster industry chain begins with high-performance materials and specialized components used in discharge channels, magnetic circuits, electrodes, grids, cathodes, heaters, valves and thermal structures, together with precision electronics, sensors and propellant-management interfaces. Depending on the propulsion architecture, critical inputs can include permanent magnets, magnetic alloys, ceramics, refractory metals, precision-machined structures and high-voltage electrical components. At the midstream level, thruster manufacturers perform plasma-source design, magnetic or electrostatic field optimization, thermal design, precision manufacturing, assembly, vacuum testing, endurance validation and spacecraft-interface engineering. Although power processing units, tanks and fluid-management hardware form part of a complete electric propulsion system, the Spacecraft Electric Thruster market analyzed here focuses on the thrust-producing hardware and its directly integrated elements.

Downstream customers include satellite primes, SmallSat manufacturers, constellation operators, defense spacecraft programs, GEO communications platforms, orbital transportation providers and deep-space mission contractors. Value creation is

therefore concentrated less in commodity raw materials and more in propulsion physics, lifetime engineering, manufacturing repeatability, vacuum qualification and accumulated flight heritage. Mature suppliers can defend higher-value positions through reliability data and mission qualification, while new manufacturers increasingly compete through design simplification, lower-cost production, modular interfaces and shorter delivery cycles. As volumes rise, the relative importance of manufacturing yield and capacity utilization is expected to increase, shifting part of industry value creation from bespoke engineering toward qualified serial production.

Segment Insights

By technology, Hall-effect and HEMPT products constitute the largest Spacecraft Electric Thruster segment and represented more than 60% of the modeled 2025 thruster-hardware revenue pool. Their position is supported by broad applicability across LEO and GEO missions, scalable power levels and extensive flight heritage. Gridded-ion thrusters form another important high-efficiency segment, particularly where very high specific impulse and long-duration operation outweigh thrust-density requirements. FEEP, electrospray, electrothermal, pulsed-plasma, vacuum-arc and RF-plasma solutions remain smaller in revenue terms but are strategically relevant in precision control, CubeSat propulsion, alternative-propellant architectures and specialized missions. ESA identifies Hall, gridded-ion and HEMPT technologies among the most mature electric-propulsion architectures, while NASA's current SmallSat technology review confirms a substantially broader set of commercially available or developing electric-propulsion options.

By power class and application, the market is becoming increasingly polarized. Lower-power products below roughly 500 W are benefiting from SmallSat, CubeSat and constellation applications, where compact size, low mass, simple integration and unit economics are central purchasing criteria. Multi-kilowatt thrusters address higher-value GEO, large spacecraft and deep-space missions, where lifetime, total impulse and mission assurance carry greater weight and average equipment value is generally higher. The fastest product innovation is occurring between these two traditional poles, as sub-kilowatt platforms seek higher propellant throughput and larger spacecraft pursue higher-power electric propulsion for orbital transportation and exploration. This broadening performance envelope is increasing the number of addressable spacecraft classes without eliminating the role of specialized technologies.

Downstream Market Opportunities

The largest downstream opportunity is associated with the expanding requirement for active maneuverability across LEO satellite and constellation platforms. Propulsion is increasingly used not only for maintaining orbit but also for deployment optimization, constellation phasing, collision avoidance, lifetime extension and controlled disposal, increasing the functional value of the Spacecraft Electric Thruster within the spacecraft bill of materials. GEO communications satellites remain an important high-value application because electric orbit raising can reduce propellant mass, while deep-space missions favor high-specific-impulse propulsion for long-duration delta-v. Orbital transfer vehicles and in-space servicing represent an additional emerging demand source because their business models require repeated maneuvering and high total impulse. Longer term, tighter orbital-sustainability requirements could increase propulsion adoption among smaller spacecraft that previously relied primarily on passive orbital decay.

Regional Insights

Europe and North America currently have the deepest independent supplier ecosystems. Europe combines heritage Hall, gridded-ion and HEMPT capabilities with a particularly diverse group of specialized manufacturers developing FEEP, iodine, water-based, RF and vacuum-arc products. North America combines established aerospace and defense propulsion suppliers with a strong NewSpace base and an increasingly important vertical-integration model among spacecraft manufacturers. Rocket Lab's 2026 launch of an internally designed Hall system and a production line designed for more than 200 thrusters annually demonstrates how rapidly production economics are becoming part of regional competition.

China is becoming a more important manufacturing center as institutional propulsion expertise transitions toward broader engineering production and commercial supply. China's established aerospace organizations now cover a wide Hall-thruster power spectrum; the China National Space Administration reported that one domestic development organization has established Hall products ranging from approximately 100 W to 100 kW. The competitive base is also expanding through commercial suppliers and vertically integrated satellite companies. Japan remains a technologically strong but more concentrated market, while India, South Korea, Singapore, Australia and Israel contain smaller but increasingly differentiated supplier clusters. The principal regional opportunity is therefore shifting from simple technology availability toward

scalable local manufacturing, qualification capability and secure supply.

Competitive Landscape Analysis

The Spacecraft Electric Thruster market has a fragmented but strongly tiered competitive structure. Established aerospace propulsion suppliers such as Safran, L3Harris, Busek, ArianeGroup, QinetiQ, SITAEL, Thales and other long-standing manufacturers compete primarily through flight heritage, lifetime qualification, high-power capability and integration into demanding institutional, GEO and exploration programs. A second group of specialized companies—including ENPULSION, Exotrail, Orbion, Phase Four, Pale Blue, Bellatrix Aerospace, T4i, ThrustMe and other confirmed suppliers—focuses more heavily on SmallSat compatibility, alternative propellants, modular systems, shorter lead times and serial manufacturing. Chinese supply is evolving from an institution-led structure toward a combination of state-backed engineering organizations, commercial propulsion specialists and internally integrated satellite manufacturers. Competitive differentiation is increasingly shifting from peak thruster performance alone toward lifetime, manufacturability, qualification speed, unit cost and supply reliability. Rocket Lab's 2026 entry illustrates a broader strategic shift in which spacecraft companies may internalize propulsion manufacturing, while recent NASA technology-commercialization programs demonstrate that licensing and industry transfer can also create new entrants. As production volumes rise, the strongest independent suppliers are likely to be those capable of combining flight-proven reliability with industrial-scale output rather than optimizing only a single propulsion-performance metric.

Report Scope

This report studies the global Spacecraft Electric Thruster production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Spacecraft Electric Thruster and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Spacecraft Electric Thruster that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Spacecraft Electric Thruster total production and demand, 2021-2032, (Units)

Global Spacecraft Electric Thruster total production value, 2021-2032, (USD Million)

Global Spacecraft Electric Thruster production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Spacecraft Electric Thruster consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Spacecraft Electric Thruster domestic production, consumption, key domestic manufacturers and share

Global Spacecraft Electric Thruster production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Spacecraft Electric Thruster production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Spacecraft Electric Thruster production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Spacecraft Electric Thruster market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Safran, L3Harris Technologies, Busek Co. Inc., China Aerospace Science and Technology Corporation, Astra Space, Inc., ENPULSION GmbH, SITAEL S.p.A., EDB Fakel, Exotrail, QinetiQ Group plc, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices

used in analyzing the World Spacecraft Electric Thruster market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Spacecraft Electric Thruster Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Spacecraft Electric Thruster Market, Segmentation by Type:

Hall-Effect and HEMPT Thrusters

Gridded Ion Thrusters

FEEP and Electrospray Thrusters

Electrothermal Thrusters

Others

Global Spacecraft Electric Thruster Market, Segmentation by Input Power Class:

Below 100 W

100–500 W

>500 W–2 kW

>2–10 kW

Above 10 kW

Global Spacecraft Electric Thruster Market, Segmentation by Nominal Propellant:

Xenon

Krypton

Argon

Others

Global Spacecraft Electric Thruster Market, Segmentation by Application:

VLEO Satellites and Constellations

MEO Navigation and Other Spacecraft

GEO Communications and All-Electric Satellites

Others

Companies Profiled:

Safran

L3Harris Technologies

Busek Co. Inc.

China Aerospace Science and Technology Corporation

Astra Space, Inc.

ENPULSION GmbH

SITAEL S.p.A.

EDB Fakel

Exotrail

QinetiQ Group plc

Northrop Grumman

IHI Corporation

Rafael

NEC Corporation

Orbion

Phase Four

Pale Blue Inc.

Bellatrix Aerospace

T4i

Bradford Space

SETS

Morpheus Space

ExoTerra

Benchmark Space Systems

ThrustMe

Aliena

Shanghai Hegias Aerospace Power Technology

Aotian Technology (Beijing) Co., Ltd.

Key Questions Answered

1. How big is the global Spacecraft Electric Thruster market?
2. What is the demand of the global Spacecraft Electric Thruster market?
3. What is the year over year growth of the global Spacecraft Electric Thruster market?
4. What is the total value of the global Spacecraft Electric Thruster market?
5. Who are the Major Players in the global Spacecraft Electric Thruster market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 Spacecraft Electric Thruster Introduction
- 1.2 World Spacecraft Electric Thruster Supply & Forecast
 - 1.2.1 World Spacecraft Electric Thruster Production Value (2021 & 2025 & 2032)
 - 1.2.2 World Spacecraft Electric Thruster Production (2021-2032)
 - 1.2.3 World Spacecraft Electric Thruster Pricing Trends (2021-2032)
- 1.3 World Spacecraft Electric Thruster Production by Region (Based on Production Site)
 - 1.3.1 World Spacecraft Electric Thruster Production Value by Region (2021-2032)
 - 1.3.2 World Spacecraft Electric Thruster Production by Region (2021-2032)
 - 1.3.3 World Spacecraft Electric Thruster Average Price by Region (2021-2032)
 - 1.3.4 North America Spacecraft Electric Thruster Production (2021-2032)
 - 1.3.5 Europe Spacecraft Electric Thruster Production (2021-2032)
 - 1.3.6 China Spacecraft Electric Thruster Production (2021-2032)
 - 1.3.7 Japan Spacecraft Electric Thruster Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Spacecraft Electric Thruster Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Spacecraft Electric Thruster Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Spacecraft Electric Thruster Demand (2021-2032)
- 2.2 World Spacecraft Electric Thruster Consumption by Region
 - 2.2.1 World Spacecraft Electric Thruster Consumption by Region (2021-2026)
 - 2.2.2 World Spacecraft Electric Thruster Consumption Forecast by Region (2027-2032)
- 2.3 United States Spacecraft Electric Thruster Consumption (2021-2032)
- 2.4 China Spacecraft Electric Thruster Consumption (2021-2032)
- 2.5 Europe Spacecraft Electric Thruster Consumption (2021-2032)
- 2.6 Japan Spacecraft Electric Thruster Consumption (2021-2032)
- 2.7 South Korea Spacecraft Electric Thruster Consumption (2021-2032)
- 2.8 ASEAN Spacecraft Electric Thruster Consumption (2021-2032)
- 2.9 India Spacecraft Electric Thruster Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Spacecraft Electric Thruster Production Value by Manufacturer (2021-2026)
- 3.2 World Spacecraft Electric Thruster Production by Manufacturer (2021-2026)
- 3.3 World Spacecraft Electric Thruster Average Price by Manufacturer (2021-2026)
- 3.4 Spacecraft Electric Thruster Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global Spacecraft Electric Thruster Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for Spacecraft Electric Thruster in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for Spacecraft Electric Thruster in 2025
- 3.6 Spacecraft Electric Thruster Market: Overall Company Footprint Analysis
 - 3.6.1 Spacecraft Electric Thruster Market: Region Footprint
 - 3.6.2 Spacecraft Electric Thruster Market: Company Product Type Footprint
 - 3.6.3 Spacecraft Electric Thruster Market: Company Product Application Footprint
- 3.7 Competitive Environment
 - 3.7.1 Historical Structure of the Industry
 - 3.7.2 Barriers of Market Entry
 - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

- 4.1 United States VS China: Spacecraft Electric Thruster Production Value Comparison
 - 4.1.1 United States VS China: Spacecraft Electric Thruster Production Value Comparison (2021 & 2025 & 2032)
 - 4.1.2 United States VS China: Spacecraft Electric Thruster Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: Spacecraft Electric Thruster Production Comparison
 - 4.2.1 United States VS China: Spacecraft Electric Thruster Production Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: Spacecraft Electric Thruster Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: Spacecraft Electric Thruster Consumption Comparison
 - 4.3.1 United States VS China: Spacecraft Electric Thruster Consumption Comparison (2021 & 2025 & 2032)
 - 4.3.2 United States VS China: Spacecraft Electric Thruster Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based Spacecraft Electric Thruster Manufacturers and Market Share, 2021-2026
 - 4.4.1 United States Based Spacecraft Electric Thruster Manufacturers, Headquarters

and Production Site (States, Country)

4.4.2 United States Based Manufacturers Spacecraft Electric Thruster Production Value (2021-2026)

4.4.3 United States Based Manufacturers Spacecraft Electric Thruster Production (2021-2026)

4.5 China Based Spacecraft Electric Thruster Manufacturers and Market Share

4.5.1 China Based Spacecraft Electric Thruster Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Spacecraft Electric Thruster Production Value (2021-2026)

4.5.3 China Based Manufacturers Spacecraft Electric Thruster Production (2021-2026)

4.6 Rest of World Based Spacecraft Electric Thruster Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Spacecraft Electric Thruster Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Spacecraft Electric Thruster Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Spacecraft Electric Thruster Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Spacecraft Electric Thruster Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Hall-Effect and HEMPT Thrusters

5.2.2 Gridded Ion Thrusters

5.2.3 FEEP and Electrospray Thrusters

5.2.4 Electrothermal Thrusters

5.2.5 Others

5.3 Market Segment by Type

5.3.1 World Spacecraft Electric Thruster Production by Type (2021-2032)

5.3.2 World Spacecraft Electric Thruster Production Value by Type (2021-2032)

5.3.3 World Spacecraft Electric Thruster Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY INPUT POWER CLASS

6.1 World Spacecraft Electric Thruster Market Size Overview by Input Power Class: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Input Power Class

6.2.1 Below 100 W

6.2.2 100–500 W

6.2.3 >500 W–2 kW

6.2.4 >2–10 kW

6.2.5 Above 10 kW

6.3 Market Segment by Input Power Class

6.3.1 World Spacecraft Electric Thruster Production by Input Power Class (2021-2032)

6.3.2 World Spacecraft Electric Thruster Production Value by Input Power Class (2021-2032)

6.3.3 World Spacecraft Electric Thruster Average Price by Input Power Class (2021-2032)

7 MARKET ANALYSIS BY NOMINAL PROPELLANT

7.1 World Spacecraft Electric Thruster Market Size Overview by Nominal Propellant: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Nominal Propellant

7.2.1 Xenon

7.2.2 Krypton

7.2.3 Argon

7.2.4 Others

7.3 Market Segment by Nominal Propellant

7.3.1 World Spacecraft Electric Thruster Production by Nominal Propellant (2021-2032)

7.3.2 World Spacecraft Electric Thruster Production Value by Nominal Propellant (2021-2032)

7.3.3 World Spacecraft Electric Thruster Average Price by Nominal Propellant (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Spacecraft Electric Thruster Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 VLEO Satellites and Constellations

8.2.2 MEO Navigation and Other Spacecraft

8.2.3 GEO Communications and All-Electric Satellites

8.2.4 Others

8.3 Market Segment by Application

8.3.1 World Spacecraft Electric Thruster Production by Application (2021-2032)

8.3.2 World Spacecraft Electric Thruster Production Value by Application (2021-2032)

8.3.3 World Spacecraft Electric Thruster Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 Safran

9.1.1 Safran Details

9.1.2 Safran Major Business

9.1.3 Safran Spacecraft Electric Thruster Product and Services

9.1.4 Safran Spacecraft Electric Thruster Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 Safran Recent Developments/Updates

9.1.6 Safran Competitive Strengths & Weaknesses

9.2 L3Harris Technologies

9.2.1 L3Harris Technologies Details

9.2.2 L3Harris Technologies Major Business

9.2.3 L3Harris Technologies Spacecraft Electric Thruster Product and Services

9.2.4 L3Harris Technologies Spacecraft Electric Thruster Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.2.5 L3Harris Technologies Recent Developments/Updates

9.2.6 L3Harris Technologies Competitive Strengths & Weaknesses

9.3 Busek Co. Inc.

9.3.1 Busek Co. Inc. Details

9.3.2 Busek Co. Inc. Major Business

9.3.3 Busek Co. Inc. Spacecraft Electric Thruster Product and Services

9.3.4 Busek Co. Inc. Spacecraft Electric Thruster Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.3.5 Busek Co. Inc. Recent Developments/Updates

9.3.6 Busek Co. Inc. Competitive Strengths & Weaknesses

9.4 China Aerospace Science and Technology Corporation

9.4.1 China Aerospace Science and Technology Corporation Details

9.4.2 China Aerospace Science and Technology Corporation Major Business

9.4.3 China Aerospace Science and Technology Corporation Spacecraft Electric Thruster Product and Services

9.4.4 China Aerospace Science and Technology Corporation Spacecraft Electric Thruster Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.4.5 China Aerospace Science and Technology Corporation Recent

Developments/Updates

9.4.6 China Aerospace Science and Technology Corporation Competitive Strengths & Weaknesses

9.5 Astra Space, Inc.

9.5.1 Astra Space, Inc. Details

9.5.2 Astra Space, Inc. Major Business

9.5.3 Astra Space, Inc. Spacecraft Electric Thruster Product and Services

9.5.4 Astra Space, Inc. Spacecraft Electric Thruster Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.5.5 Astra Space, Inc. Recent Developments/Updates

9.5.6 Astra Space, Inc. Competitive Strengths & Weaknesses

9.6 ENPULSION GmbH

9.6.1 ENPULSION GmbH Details

9.6.2 ENPULSION GmbH Major Business

9.6.3 ENPULSION GmbH Spacecraft Electric Thruster Product and Services

9.6.4 ENPULSION GmbH Spacecraft Electric Thruster Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.6.5 ENPULSION GmbH Recent Developments/Updates

9.6.6 ENPULSION GmbH Competitive Strengths & Weaknesses

9.7 SITael S.p.A.

9.7.1 SITael S.p.A. Details

9.7.2 SITael S.p.A. Major Business

9.7.3 SITael S.p.A. Spacecraft Electric Thruster Product and Services

9.7.4 SITael S.p.A. Spacecraft Electric Thruster Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.7.5 SITael S.p.A. Recent Developments/Updates

9.7.6 SITael S.p.A. Competitive Strengths & Weaknesses

9.8 EDB Fakel

9.8.1 EDB Fakel Details

9.8.2 EDB Fakel Major Business

9.8.3 EDB Fakel Spacecraft Electric Thruster Product and Services

9.8.4 EDB Fakel Spacecraft Electric Thruster Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.8.5 EDB Fakel Recent Developments/Updates

9.8.6 EDB Fakel Competitive Strengths & Weaknesses

9.9 Exotrail

9.9.1 Exotrail Details

9.9.2 Exotrail Major Business

9.9.3 Exotrail Spacecraft Electric Thruster Product and Services

9.9.4 Exotrail Spacecraft Electric Thruster Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.9.5 Exotrail Recent Developments/Updates

9.9.6 Exotrail Competitive Strengths & Weaknesses

9.10 QinetiQ Group plc

9.10.1 QinetiQ Group plc Details

9.10.2 QinetiQ Group plc Major Business

9.10.3 QinetiQ Group plc Spacecraft Electric Thruster Product and Services

9.10.4 QinetiQ Group plc Spacecraft Electric Thruster Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.10.5 QinetiQ Group plc Recent Developments/Updates

9.10.6 QinetiQ Group plc Competitive Strengths & Weaknesses

9.11 Northrop Grumman

9.11.1 Northrop Grumman Details

9.11.2 Northrop Grumman Major Business

9.11.3 Northrop Grumman Spacecraft Electric Thruster Product and Services

9.11.4 Northrop Grumman Spacecraft Electric Thruster Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.11.5 Northrop Grumman Recent Developments/Updates

9.11.6 Northrop Grumman Competitive Strengths & Weaknesses

9.12 IHI Corporation

9.12.1 IHI Corporation Details

9.12.2 IHI Corporation Major Business

9.12.3 IHI Corporation Spacecraft Electric Thruster Product and Services

9.12.4 IHI Corporation Spacecraft Electric Thruster Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.12.5 IHI Corporation Recent Developments/Updates

9.12.6 IHI Corporation Competitive Strengths & Weaknesses

9.13 Rafael

9.13.1 Rafael Details

9.13.2 Rafael Major Business

9.13.3 Rafael Spacecraft Electric Thruster Product and Services

9.13.4 Rafael Spacecraft Electric Thruster Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.13.5 Rafael Recent Developments/Updates

9.13.6 Rafael Competitive Strengths & Weaknesses

9.14 NEC Corporation

9.14.1 NEC Corporation Details

9.14.2 NEC Corporation Major Business

- 9.14.3 NEC Corporation Spacecraft Electric Thruster Product and Services
- 9.14.4 NEC Corporation Spacecraft Electric Thruster Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.14.5 NEC Corporation Recent Developments/Updates
- 9.14.6 NEC Corporation Competitive Strengths & Weaknesses
- 9.15 Orbion
 - 9.15.1 Orbion Details
 - 9.15.2 Orbion Major Business
 - 9.15.3 Orbion Spacecraft Electric Thruster Product and Services
 - 9.15.4 Orbion Spacecraft Electric Thruster Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.15.5 Orbion Recent Developments/Updates
 - 9.15.6 Orbion Competitive Strengths & Weaknesses
- 9.16 Phase Four
 - 9.16.1 Phase Four Details
 - 9.16.2 Phase Four Major Business
 - 9.16.3 Phase Four Spacecraft Electric Thruster Product and Services
 - 9.16.4 Phase Four Spacecraft Electric Thruster Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.16.5 Phase Four Recent Developments/Updates
 - 9.16.6 Phase Four Competitive Strengths & Weaknesses
- 9.17 Pale Blue Inc.
 - 9.17.1 Pale Blue Inc. Details
 - 9.17.2 Pale Blue Inc. Major Business
 - 9.17.3 Pale Blue Inc. Spacecraft Electric Thruster Product and Services
 - 9.17.4 Pale Blue Inc. Spacecraft Electric Thruster Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.17.5 Pale Blue Inc. Recent Developments/Updates
 - 9.17.6 Pale Blue Inc. Competitive Strengths & Weaknesses
- 9.18 Bellatrix Aerospace
 - 9.18.1 Bellatrix Aerospace Details
 - 9.18.2 Bellatrix Aerospace Major Business
 - 9.18.3 Bellatrix Aerospace Spacecraft Electric Thruster Product and Services
 - 9.18.4 Bellatrix Aerospace Spacecraft Electric Thruster Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.18.5 Bellatrix Aerospace Recent Developments/Updates
 - 9.18.6 Bellatrix Aerospace Competitive Strengths & Weaknesses
- 9.19 T4i
 - 9.19.1 T4i Details

- 9.19.2 T4i Major Business
- 9.19.3 T4i Spacecraft Electric Thruster Product and Services
- 9.19.4 T4i Spacecraft Electric Thruster Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.19.5 T4i Recent Developments/Updates
- 9.19.6 T4i Competitive Strengths & Weaknesses
- 9.20 Bradford Space
 - 9.20.1 Bradford Space Details
 - 9.20.2 Bradford Space Major Business
 - 9.20.3 Bradford Space Spacecraft Electric Thruster Product and Services
 - 9.20.4 Bradford Space Spacecraft Electric Thruster Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.20.5 Bradford Space Recent Developments/Updates
 - 9.20.6 Bradford Space Competitive Strengths & Weaknesses
- 9.21 SETS
 - 9.21.1 SETS Details
 - 9.21.2 SETS Major Business
 - 9.21.3 SETS Spacecraft Electric Thruster Product and Services
 - 9.21.4 SETS Spacecraft Electric Thruster Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.21.5 SETS Recent Developments/Updates
 - 9.21.6 SETS Competitive Strengths & Weaknesses
- 9.22 Morpheus Space
 - 9.22.1 Morpheus Space Details
 - 9.22.2 Morpheus Space Major Business
 - 9.22.3 Morpheus Space Spacecraft Electric Thruster Product and Services
 - 9.22.4 Morpheus Space Spacecraft Electric Thruster Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.22.5 Morpheus Space Recent Developments/Updates
 - 9.22.6 Morpheus Space Competitive Strengths & Weaknesses
- 9.23 ExoTerra
 - 9.23.1 ExoTerra Details
 - 9.23.2 ExoTerra Major Business
 - 9.23.3 ExoTerra Spacecraft Electric Thruster Product and Services
 - 9.23.4 ExoTerra Spacecraft Electric Thruster Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.23.5 ExoTerra Recent Developments/Updates
 - 9.23.6 ExoTerra Competitive Strengths & Weaknesses
- 9.24 Benchmark Space Systems

- 9.24.1 Benchmark Space Systems Details
- 9.24.2 Benchmark Space Systems Major Business
- 9.24.3 Benchmark Space Systems Spacecraft Electric Thruster Product and Services
- 9.24.4 Benchmark Space Systems Spacecraft Electric Thruster Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.24.5 Benchmark Space Systems Recent Developments/Updates
- 9.24.6 Benchmark Space Systems Competitive Strengths & Weaknesses
- 9.25 ThrustMe
 - 9.25.1 ThrustMe Details
 - 9.25.2 ThrustMe Major Business
 - 9.25.3 ThrustMe Spacecraft Electric Thruster Product and Services
 - 9.25.4 ThrustMe Spacecraft Electric Thruster Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.25.5 ThrustMe Recent Developments/Updates
 - 9.25.6 ThrustMe Competitive Strengths & Weaknesses
- 9.26 Aliena
 - 9.26.1 Aliena Details
 - 9.26.2 Aliena Major Business
 - 9.26.3 Aliena Spacecraft Electric Thruster Product and Services
 - 9.26.4 Aliena Spacecraft Electric Thruster Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.26.5 Aliena Recent Developments/Updates
 - 9.26.6 Aliena Competitive Strengths & Weaknesses
- 9.27 Shanghai Hegias Aerospace Power Technology
 - 9.27.1 Shanghai Hegias Aerospace Power Technology Details
 - 9.27.2 Shanghai Hegias Aerospace Power Technology Major Business
 - 9.27.3 Shanghai Hegias Aerospace Power Technology Spacecraft Electric Thruster Product and Services
 - 9.27.4 Shanghai Hegias Aerospace Power Technology Spacecraft Electric Thruster Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.27.5 Shanghai Hegias Aerospace Power Technology Recent Developments/Updates
 - 9.27.6 Shanghai Hegias Aerospace Power Technology Competitive Strengths & Weaknesses
- 9.28 Aotian Technology (Beijing) Co., Ltd.
 - 9.28.1 Aotian Technology (Beijing) Co., Ltd. Details
 - 9.28.2 Aotian Technology (Beijing) Co., Ltd. Major Business
 - 9.28.3 Aotian Technology (Beijing) Co., Ltd. Spacecraft Electric Thruster Product and Services
 - 9.28.4 Aotian Technology (Beijing) Co., Ltd. Spacecraft Electric Thruster Production,

Price, Value, Gross Margin and Market Share (2021-2026)

9.28.5 Aotian Technology (Beijing) Co., Ltd. Recent Developments/Updates

9.28.6 Aotian Technology (Beijing) Co., Ltd. Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Spacecraft Electric Thruster Industry Chain

10.2 Spacecraft Electric Thruster Upstream Analysis

10.2.1 Spacecraft Electric Thruster Core Raw Materials

10.2.2 Main Manufacturers of Spacecraft Electric Thruster Core Raw Materials

10.3 Midstream Analysis

10.4 Downstream Analysis

10.5 Spacecraft Electric Thruster Production Mode

10.6 Spacecraft Electric Thruster Procurement Model

10.7 Spacecraft Electric Thruster Industry Sales Model and Sales Channels

10.7.1 Spacecraft Electric Thruster Sales Model

10.7.2 Spacecraft Electric Thruster Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Spacecraft Electric Thruster Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Spacecraft Electric Thruster Production Value by Region (2021-2026) & (USD Million)

Table 3. World Spacecraft Electric Thruster Production Value by Region (2027-2032) & (USD Million)

Table 4. World Spacecraft Electric Thruster Production Value Market Share by Region (2021-2026)

Table 5. World Spacecraft Electric Thruster Production Value Market Share by Region (2027-2032)

Table 6. World Spacecraft Electric Thruster Production by Region (2021-2026) & (Units)

Table 7. World Spacecraft Electric Thruster Production by Region (2027-2032) & (Units)

Table 8. World Spacecraft Electric Thruster Production Market Share by Region (2021-2026)

Table 9. World Spacecraft Electric Thruster Production Market Share by Region (2027-2032)

Table 10. World Spacecraft Electric Thruster Average Price by Region (2021-2026) & (US\$/Unit)

Table 11. World Spacecraft Electric Thruster Average Price by Region (2027-2032) & (US\$/Unit)

Table 12. Spacecraft Electric Thruster Major Market Trends

Table 13. World Spacecraft Electric Thruster Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Units)

Table 14. World Spacecraft Electric Thruster Consumption by Region (2021-2026) & (Units)

Table 15. World Spacecraft Electric Thruster Consumption Forecast by Region (2027-2032) & (Units)

Table 16. World Spacecraft Electric Thruster Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Spacecraft Electric Thruster Producers in 2025

Table 18. World Spacecraft Electric Thruster Production by Manufacturer (2021-2026) & (Units)

Table 19. Production Market Share of Key Spacecraft Electric Thruster Producers in 2025

Table 20. World Spacecraft Electric Thruster Average Price by Manufacturer (2021-2026) & (US\$/Unit)

Table 21. Global Spacecraft Electric Thruster Company Evaluation Quadrant

Table 22. World Spacecraft Electric Thruster Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Spacecraft Electric Thruster Production Site of Key Manufacturer

Table 24. Spacecraft Electric Thruster Market: Company Product Type Footprint

Table 25. Spacecraft Electric Thruster Market: Company Product Application Footprint

Table 26. Spacecraft Electric Thruster Competitive Factors

Table 27. Spacecraft Electric Thruster New Entrant and Capacity Expansion Plans

Table 28. Spacecraft Electric Thruster Mergers & Acquisitions Activity

Table 29. United States VS China Spacecraft Electric Thruster Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Spacecraft Electric Thruster Production Comparison, (2021 & 2025 & 2032) & (Units)

Table 31. United States VS China Spacecraft Electric Thruster Consumption Comparison, (2021 & 2025 & 2032) & (Units)

Table 32. United States Based Spacecraft Electric Thruster Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Spacecraft Electric Thruster Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Spacecraft Electric Thruster Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Spacecraft Electric Thruster Production (2021-2026) & (Units)

Table 36. United States Based Manufacturers Spacecraft Electric Thruster Production Market Share (2021-2026)

Table 37. China Based Spacecraft Electric Thruster Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Spacecraft Electric Thruster Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Spacecraft Electric Thruster Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Spacecraft Electric Thruster Production, (2021-2026) & (Units)

Table 41. China Based Manufacturers Spacecraft Electric Thruster Production Market Share (2021-2026)

Table 42. Rest of World Based Spacecraft Electric Thruster Manufacturers,

Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Spacecraft Electric Thruster Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Spacecraft Electric Thruster Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Spacecraft Electric Thruster Production, (2021-2026) & (Units)

Table 46. Rest of World Based Manufacturers Spacecraft Electric Thruster Production Market Share (2021-2026)

Table 47. World Spacecraft Electric Thruster Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Spacecraft Electric Thruster Production by Type (2021-2026) & (Units)

Table 49. World Spacecraft Electric Thruster Production by Type (2027-2032) & (Units)

Table 50. World Spacecraft Electric Thruster Production Value by Type (2021-2026) & (USD Million)

Table 51. World Spacecraft Electric Thruster Production Value by Type (2027-2032) & (USD Million)

Table 52. World Spacecraft Electric Thruster Average Price by Type (2021-2026) & (US\$/Unit)

Table 53. World Spacecraft Electric Thruster Average Price by Type (2027-2032) & (US\$/Unit)

Table 54. World Spacecraft Electric Thruster Production Value by Input Power Class, (USD Million), 2021 & 2025 & 2032

Table 55. World Spacecraft Electric Thruster Production by Input Power Class (2021-2026) & (Units)

Table 56. World Spacecraft Electric Thruster Production by Input Power Class (2027-2032) & (Units)

Table 57. World Spacecraft Electric Thruster Production Value by Input Power Class (2021-2026) & (USD Million)

Table 58. World Spacecraft Electric Thruster Production Value by Input Power Class (2027-2032) & (USD Million)

Table 59. World Spacecraft Electric Thruster Average Price by Input Power Class (2021-2026) & (US\$/Unit)

Table 60. World Spacecraft Electric Thruster Average Price by Input Power Class (2027-2032) & (US\$/Unit)

Table 61. World Spacecraft Electric Thruster Production Value by Nominal Propellant, (USD Million), 2021 & 2025 & 2032

Table 62. World Spacecraft Electric Thruster Production by Nominal Propellant (2021-2026) & (Units)

Table 63. World Spacecraft Electric Thruster Production by Nominal Propellant (2027-2032) & (Units)

Table 64. World Spacecraft Electric Thruster Production Value by Nominal Propellant (2021-2026) & (USD Million)

Table 65. World Spacecraft Electric Thruster Production Value by Nominal Propellant (2027-2032) & (USD Million)

Table 66. World Spacecraft Electric Thruster Average Price by Nominal Propellant (2021-2026) & (US\$/Unit)

Table 67. World Spacecraft Electric Thruster Average Price by Nominal Propellant (2027-2032) & (US\$/Unit)

Table 68. World Spacecraft Electric Thruster Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Spacecraft Electric Thruster Production by Application (2021-2026) & (Units)

Table 70. World Spacecraft Electric Thruster Production by Application (2027-2032) & (Units)

Table 71. World Spacecraft Electric Thruster Production Value by Application (2021-2026) & (USD Million)

Table 72. World Spacecraft Electric Thruster Production Value by Application (2027-2032) & (USD Million)

Table 73. World Spacecraft Electric Thruster Average Price by Application (2021-2026) & (US\$/Unit)

Table 74. World Spacecraft Electric Thruster Average Price by Application (2027-2032) & (US\$/Unit)

Table 75. Safran Basic Information, Manufacturing Base and Competitors

Table 76. Safran Major Business

Table 77. Safran Spacecraft Electric Thruster Product and Services

Table 78. Safran Spacecraft Electric Thruster Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Safran Recent Developments/Updates

Table 80. Safran Competitive Strengths & Weaknesses

Table 81. L3Harris Technologies Basic Information, Manufacturing Base and Competitors

Table 82. L3Harris Technologies Major Business

Table 83. L3Harris Technologies Spacecraft Electric Thruster Product and Services

Table 84. L3Harris Technologies Spacecraft Electric Thruster Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. L3Harris Technologies Recent Developments/Updates

Table 86. L3Harris Technologies Competitive Strengths & Weaknesses
Table 87. Busek Co. Inc. Basic Information, Manufacturing Base and Competitors
Table 88. Busek Co. Inc. Major Business
Table 89. Busek Co. Inc. Spacecraft Electric Thruster Product and Services
Table 90. Busek Co. Inc. Spacecraft Electric Thruster Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 91. Busek Co. Inc. Recent Developments/Updates
Table 92. Busek Co. Inc. Competitive Strengths & Weaknesses
Table 93. China Aerospace Science and Technology Corporation Basic Information, Manufacturing Base and Competitors
Table 94. China Aerospace Science and Technology Corporation Major Business
Table 95. China Aerospace Science and Technology Corporation Spacecraft Electric Thruster Product and Services
Table 96. China Aerospace Science and Technology Corporation Spacecraft Electric Thruster Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 97. China Aerospace Science and Technology Corporation Recent Developments/Updates
Table 98. China Aerospace Science and Technology Corporation Competitive Strengths & Weaknesses
Table 99. Astra Space, Inc. Basic Information, Manufacturing Base and Competitors
Table 100. Astra Space, Inc. Major Business
Table 101. Astra Space, Inc. Spacecraft Electric Thruster Product and Services
Table 102. Astra Space, Inc. Spacecraft Electric Thruster Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 103. Astra Space, Inc. Recent Developments/Updates
Table 104. Astra Space, Inc. Competitive Strengths & Weaknesses
Table 105. ENPULSION GmbH Basic Information, Manufacturing Base and Competitors
Table 106. ENPULSION GmbH Major Business
Table 107. ENPULSION GmbH Spacecraft Electric Thruster Product and Services
Table 108. ENPULSION GmbH Spacecraft Electric Thruster Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 109. ENPULSION GmbH Recent Developments/Updates
Table 110. ENPULSION GmbH Competitive Strengths & Weaknesses
Table 111. SITAEI S.p.A. Basic Information, Manufacturing Base and Competitors

Table 112.	SITAEL S.p.A. Major Business
Table 113.	SITAEL S.p.A. Spacecraft Electric Thruster Product and Services
Table 114.	SITAEL S.p.A. Spacecraft Electric Thruster Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 115.	SITAEL S.p.A. Recent Developments/Updates
Table 116.	SITAEL S.p.A. Competitive Strengths & Weaknesses
Table 117.	EDB Fakel Basic Information, Manufacturing Base and Competitors
Table 118.	EDB Fakel Major Business
Table 119.	EDB Fakel Spacecraft Electric Thruster Product and Services
Table 120.	EDB Fakel Spacecraft Electric Thruster Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 121.	EDB Fakel Recent Developments/Updates
Table 122.	EDB Fakel Competitive Strengths & Weaknesses
Table 123.	Exotrail Basic Information, Manufacturing Base and Competitors
Table 124.	Exotrail Major Business
Table 125.	Exotrail Spacecraft Electric Thruster Product and Services
Table 126.	Exotrail Spacecraft Electric Thruster Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 127.	Exotrail Recent Developments/Updates
Table 128.	Exotrail Competitive Strengths & Weaknesses
Table 129.	QinetiQ Group plc Basic Information, Manufacturing Base and Competitors
Table 130.	QinetiQ Group plc Major Business
Table 131.	QinetiQ Group plc Spacecraft Electric Thruster Product and Services
Table 132.	QinetiQ Group plc Spacecraft Electric Thruster Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 133.	QinetiQ Group plc Recent Developments/Updates
Table 134.	QinetiQ Group plc Competitive Strengths & Weaknesses
Table 135.	Northrop Grumman Basic Information, Manufacturing Base and Competitors
Table 136.	Northrop Grumman Major Business
Table 137.	Northrop Grumman Spacecraft Electric Thruster Product and Services
Table 138.	Northrop Grumman Spacecraft Electric Thruster Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 139.	Northrop Grumman Recent Developments/Updates
Table 140.	Northrop Grumman Competitive Strengths & Weaknesses
Table 141.	IHI Corporation Basic Information, Manufacturing Base and Competitors
Table 142.	IHI Corporation Major Business

Table 143. IHI Corporation Spacecraft Electric Thruster Product and Services

Table 144. IHI Corporation Spacecraft Electric Thruster Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 145. IHI Corporation Recent Developments/Updates

Table 146. IHI Corporation Competitive Strengths & Weaknesses

Table 147. Rafael Basic Information, Manufacturing Base and Competitors

Table 148. Rafael Major Business

Table 149. Rafael Spacecraft Electric Thruster Product and Services

Table 150. Rafael Spacecraft Electric Thruster Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 151. Rafael Recent Developments/Updates

Table 152. Rafael Competitive Strengths & Weaknesses

Table 153. NEC Corporation Basic Information, Manufacturing Base and Competitors

Table 154. NEC Corporation Major Business

Table 155. NEC Corporation Spacecraft Electric Thruster Product and Services

Table 156. NEC Corporation Spacecraft Electric Thruster Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 157. NEC Corporation Recent Developments/Updates

Table 158. NEC Corporation Competitive Strengths & Weaknesses

Table 159. Orbion Basic Information, Manufacturing Base and Competitors

Table 160. Orbion Major Business

Table 161. Orbion Spacecraft Electric Thruster Product and Services

Table 162. Orbion Spacecraft Electric Thruster Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 163. Orbion Recent Developments/Updates

Table 164. Orbion Competitive Strengths & Weaknesses

Table 165. Phase Four Basic Information, Manufacturing Base and Competitors

Table 166. Phase Four Major Business

Table 167. Phase Four Spacecraft Electric Thruster Product and Services

Table 168. Phase Four Spacecraft Electric Thruster Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 169. Phase Four Recent Developments/Updates

Table 170. Phase Four Competitive Strengths & Weaknesses

Table 171. Pale Blue Inc. Basic Information, Manufacturing Base and Competitors

Table 172. Pale Blue Inc. Major Business

Table 173. Pale Blue Inc. Spacecraft Electric Thruster Product and Services

Table 174. Pale Blue Inc. Spacecraft Electric Thruster Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 175. Pale Blue Inc. Recent Developments/Updates

Table 176. Pale Blue Inc. Competitive Strengths & Weaknesses

Table 177. Bellatrix Aerospace Basic Information, Manufacturing Base and Competitors

Table 178. Bellatrix Aerospace Major Business

Table 179. Bellatrix Aerospace Spacecraft Electric Thruster Product and Services

Table 180. Bellatrix Aerospace Spacecraft Electric Thruster Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 181. Bellatrix Aerospace Recent Developments/Updates

Table 182. Bellatrix Aerospace Competitive Strengths & Weaknesses

Table 183. T4i Basic Information, Manufacturing Base and Competitors

Table 184. T4i Major Business

Table 185. T4i Spacecraft Electric Thruster Product and Services

Table 186. T4i Spacecraft Electric Thruster Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 187. T4i Recent Developments/Updates

Table 188. T4i Competitive Strengths & Weaknesses

Table 189. Bradford Space Basic Information, Manufacturing Base and Competitors

Table 190. Bradford Space Major Business

Table 191. Bradford Space Spacecraft Electric Thruster Product and Services

Table 192. Bradford Space Spacecraft Electric Thruster Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 193. Bradford Space Recent Developments/Updates

Table 194. Bradford Space Competitive Strengths & Weaknesses

Table 195. SETS Basic Information, Manufacturing Base and Competitors

Table 196. SETS Major Business

Table 197. SETS Spacecraft Electric Thruster Product and Services

Table 198. SETS Spacecraft Electric Thruster Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 199. SETS Recent Developments/Updates

Table 200. SETS Competitive Strengths & Weaknesses

Table 201. Morpheus Space Basic Information, Manufacturing Base and Competitors

Table 202. Morpheus Space Major Business

Table 203. Morpheus Space Spacecraft Electric Thruster Product and Services

Table 204. Morpheus Space Spacecraft Electric Thruster Production (Units), Price

(US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 205. Morpheus Space Recent Developments/Updates

Table 206. Morpheus Space Competitive Strengths & Weaknesses

Table 207. ExoTerra Basic Information, Manufacturing Base and Competitors

Table 208. ExoTerra Major Business

Table 209. ExoTerra Spacecraft Electric Thruster Product and Services

Table 210. ExoTerra Spacecraft Electric Thruster Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 211. ExoTerra Recent Developments/Updates

Table 212. ExoTerra Competitive Strengths & Weaknesses

Table 213. Benchmark Space Systems Basic Information, Manufacturing Base and Competitors

Table 214. Benchmark Space Systems Major Business

Table 215. Benchmark Space Systems Spacecraft Electric Thruster Product and Services

Table 216. Benchmark Space Systems Spacecraft Electric Thruster Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 217. Benchmark Space Systems Recent Developments/Updates

Table 218. Benchmark Space Systems Competitive Strengths & Weaknesses

Table 219. ThrustMe Basic Information, Manufacturing Base and Competitors

Table 220. ThrustMe Major Business

Table 221. ThrustMe Spacecraft Electric Thruster Product and Services

Table 222. ThrustMe Spacecraft Electric Thruster Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 223. ThrustMe Recent Developments/Updates

Table 224. ThrustMe Competitive Strengths & Weaknesses

Table 225. Aliena Basic Information, Manufacturing Base and Competitors

Table 226. Aliena Major Business

Table 227. Aliena Spacecraft Electric Thruster Product and Services

Table 228. Aliena Spacecraft Electric Thruster Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 229. Aliena Recent Developments/Updates

Table 230. Aliena Competitive Strengths & Weaknesses

Table 231. Shanghai Hegias Aerospace Power Technology Basic Information, Manufacturing Base and Competitors

Table 232. Shanghai Hegias Aerospace Power Technology Major Business

Table 233. Shanghai Hegias Aerospace Power Technology Spacecraft Electric Thruster

Product and Services

Table 234. Shanghai Hegias Aerospace Power Technology Spacecraft Electric Thruster Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 235. Shanghai Hegias Aerospace Power Technology Recent Developments/Updates

Table 236. Shanghai Hegias Aerospace Power Technology Competitive Strengths & Weaknesses

Table 237. Aotian Technology (Beijing) Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 238. Aotian Technology (Beijing) Co., Ltd. Major Business

Table 239. Aotian Technology (Beijing) Co., Ltd. Spacecraft Electric Thruster Product and Services

Table 240. Aotian Technology (Beijing) Co., Ltd. Spacecraft Electric Thruster Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 241. Aotian Technology (Beijing) Co., Ltd. Recent Developments/Updates

Table 242. Aotian Technology (Beijing) Co., Ltd. Competitive Strengths & Weaknesses

Table 243. Global Key Players of Spacecraft Electric Thruster Upstream (Raw Materials)

Table 244. Global Spacecraft Electric Thruster Typical Customers

Table 245. Spacecraft Electric Thruster Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Spacecraft Electric Thruster Picture

Figure 2. World Spacecraft Electric Thruster Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Spacecraft Electric Thruster Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Spacecraft Electric Thruster Production (2021-2032) & (Units)

Figure 5. World Spacecraft Electric Thruster Average Price (2021-2032) & (US\$/Unit)

Figure 6. World Spacecraft Electric Thruster Production Value Market Share by Region (2021-2032)

Figure 7. World Spacecraft Electric Thruster Production Market Share by Region (2021-2032)

Figure 8. North America Spacecraft Electric Thruster Production (2021-2032) & (Units)

Figure 9. Europe Spacecraft Electric Thruster Production (2021-2032) & (Units)

Figure 10. China Spacecraft Electric Thruster Production (2021-2032) & (Units)

Figure 11. Japan Spacecraft Electric Thruster Production (2021-2032) & (Units)

Figure 12. Spacecraft Electric Thruster Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World Spacecraft Electric Thruster Consumption (2021-2032) & (Units)

Figure 15. World Spacecraft Electric Thruster Consumption Market Share by Region (2021-2032)

Figure 16. United States Spacecraft Electric Thruster Consumption (2021-2032) & (Units)

Figure 17. China Spacecraft Electric Thruster Consumption (2021-2032) & (Units)

Figure 18. Europe Spacecraft Electric Thruster Consumption (2021-2032) & (Units)

Figure 19. Japan Spacecraft Electric Thruster Consumption (2021-2032) & (Units)

Figure 20. South Korea Spacecraft Electric Thruster Consumption (2021-2032) & (Units)

Figure 21. ASEAN Spacecraft Electric Thruster Consumption (2021-2032) & (Units)

Figure 22. India Spacecraft Electric Thruster Consumption (2021-2032) & (Units)

Figure 23. Producer Shipments of Spacecraft Electric Thruster by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for Spacecraft Electric Thruster Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for Spacecraft Electric Thruster Markets in 2025

Figure 26. United States VS China: Spacecraft Electric Thruster Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Spacecraft Electric Thruster Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Spacecraft Electric Thruster Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers Spacecraft Electric Thruster Production Market Share 2025

Figure 30. China Based Manufacturers Spacecraft Electric Thruster Production Market Share 2025

Figure 31. Rest of World Based Manufacturers Spacecraft Electric Thruster Production Market Share 2025

Figure 32. World Spacecraft Electric Thruster Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World Spacecraft Electric Thruster Production Value Market Share by Type in 2025

Figure 34. Hall-Effect and HEMPT Thrusters

Figure 35. Gridded Ion Thrusters

Figure 36. FEEP and Electrospray Thrusters

Figure 37. Electrothermal Thrusters

Figure 38. Others

Figure 39. World Spacecraft Electric Thruster Production Market Share by Type (2021-2032)

Figure 40. World Spacecraft Electric Thruster Production Value Market Share by Type (2021-2032)

Figure 41. World Spacecraft Electric Thruster Average Price by Type (2021-2032) & (US\$/Unit)

Figure 42. World Spacecraft Electric Thruster Production Value by Input Power Class, (USD Million), 2021 & 2025 & 2032

Figure 43. World Spacecraft Electric Thruster Production Value Market Share by Input Power Class in 2025

Figure 44. Below 100 W

Figure 45. 100–500 W

Figure 46. >500 W–2 kW

Figure 47. >2–10 kW

Figure 48. Above 10 kW

Figure 49. World Spacecraft Electric Thruster Production Market Share by Input Power Class (2021-2032)

Figure 50. World Spacecraft Electric Thruster Production Value Market Share by Input

Power Class (2021-2032)

Figure 51. World Spacecraft Electric Thruster Average Price by Input Power Class (2021-2032) & (US\$/Unit)

Figure 52. World Spacecraft Electric Thruster Production Value by Nominal Propellant, (USD Million), 2021 & 2025 & 2032

Figure 53. World Spacecraft Electric Thruster Production Value Market Share by Nominal Propellant in 2025

Figure 54. Xenon

Figure 55. Krypton

Figure 56. Argon

Figure 57. Others

Figure 58. World Spacecraft Electric Thruster Production Market Share by Nominal Propellant (2021-2032)

Figure 59. World Spacecraft Electric Thruster Production Value Market Share by Nominal Propellant (2021-2032)

Figure 60. World Spacecraft Electric Thruster Average Price by Nominal Propellant (2021-2032) & (US\$/Unit)

Figure 61. World Spacecraft Electric Thruster Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 62. World Spacecraft Electric Thruster Production Value Market Share by Application in 2025

Figure 63. VLEO Satellites and Constellations

Figure 64. MEO Navigation and Other Spacecraft

Figure 65. GEO Communications and All-Electric Satellites

Figure 66. Others

Figure 67. World Spacecraft Electric Thruster Production Market Share by Application (2021-2032)

Figure 68. World Spacecraft Electric Thruster Production Value Market Share by Application (2021-2032)

Figure 69. World Spacecraft Electric Thruster Average Price by Application (2021-2032) & (US\$/Unit)

Figure 70. Spacecraft Electric Thruster Industry Chain

Figure 71. Spacecraft Electric Thruster Procurement Model

Figure 72. Spacecraft Electric Thruster Sales Model

Figure 73. Spacecraft Electric Thruster Sales Channels, Direct Sales, and Distribution

Figure 74. Methodology

Figure 75. Research Process and Data Source

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