

Satellites Market by Satellite Mass (Small, Medium, Large), Application (Communication, Earth Observation & Remote Sensing), Orbit (LEO, MEO, GEO), End User, Sub-systems, Frequency and Region - Global Forecast to 2030

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Abstracts

The satellites market is estimated to be USD 17.94 billion in 2024 and is projected to reach USD 35.95 billion by 2030, at a CAGR of 12.3% between 2024 and 2030.

Increasing demand towards remote and underserved areas globally is the key driver for the satellite market as satellites enable high-speed internet with the support of 5G networks and IoT applications. Satellite miniaturization and low-cost launch vehicles are making satellites more accessible for deployment, thereby causing growth in a myriad of sectors. Of these sectors, defense and security are major contributors by increased investments in reconnaissance, surveillance, and secure communication satellites across the world for national security. Environmental monitoring, disaster management, and agriculture are increasingly demanding Earth observation satellites. Growing momentum of satellite-based navigation systems like GPS, public-private partnerships, and commercialization of space will further propel the market to a level wherein satellite services are indispensable for both commercial and government applications.

“LEO orbit segment is set to dominate the satellites market.”

The LEO segment is to dominate the satellite market on account of optimum balance between coverage, latency, and cost-efficiency. LEO satellites are cost effective as compared to MEO counterparts and lower latencies than those of GEO satellites and, therefore, an optimal choice for applications like global navigation systems, mission-critical communications, and broadband services. Against the background of growing

demand for high-speed internet in segments such as aviation, maritime, and rural connectivity, LEOs find more preference over other satellites due to reliability in offering low-latency services. Moreover, the technological advancements from satellite technologies such as digital payloads and beamforming improve the performance from the LEO satellites. This has driven them not only in the commercial spectrum but in the defense sector also, making LEO a significant growth area in the satellite market.

“Defense by application segment is estimated to grow at highest share in forecast period.”

The defense application segment is a significant shareholder in the satellite market because of its fundamental role in national security, intelligence, and defense communications. Satellites provide critical support for surveillance, reconnaissance, and secure communication aspects of military operations by enabling real-time monitoring, gathering of intelligence, and systems for early warning. With the increase in rising geopolitical tensions, the complexity of modern warfare, and investments in SAR and optical imaging for high-resolution tracking, Governments are already shelling out big amounts for a variant of a satellite-based defense system. Demand increases there for a developed anti-satellite defense capability and to protect its space assets. By such significant investments by countries like the U.S., Russia, China, and India, defense holds the largest application segment in the satellite market.

“Asia Pacific is expected to hold the highest market share in 2024.”

Asia Pacific is set to represent the largest share in the satellite market because of heavy investment by key economies such as China, India, Japan, and South Korea in telecommunications, defense, Earth observation, and space exploration. China's BRI and India's ISRO create both domestic and international demand for satellite deployment, but the accelerating growth is because of the high demand for broadband connectivity and 5G networks in underserved areas. Defense satellites for intelligence and surveillance are also gaining takers in this region due to a focus on national security. Besides, the public-private partnerships, the improved miniature satellites technology, and a favorable regulatory environment are strengthening Asia Pacific's position at the top of the satellite market.

The break-up of the profile of primary participants in the Satellites market:

By Company Type: Tier 1 – 35%, Tier 2 – 45%, and Tier 3 – 20%

By Designation: C Level – 35%, Managers – 25%, Others – 40%

By Region: North America – 20%, Europe – 25%, Asia Pacific – 35%, Middle East – 10%, Rest of the World – 10%

SPACEX (US), Lockheed Martin Corporation (US), Airbus Defence and Space (Germany), Northrop Grumman (US), Thales Alenia Space (France), L3Harris Technologies, Inc., (US) Terran Orbital Corporation (US), SNC (US), MDA (Canada), OHB SE (Germany), RTX (US), Maxar Technologies (US), Mitsubishi Electric Corporation (MELCO) (Japan), and Planet Labs PBC (US), York Space Systems (US) and Boeing (US) are some of the key players in the satellites market.

The study includes an in-depth competitive analysis of these key players in the satellites market, with their company profiles, recent developments, and key market strategies.

Research Coverage:

This research report categorizes the satellites market by satellite mass (small, medium, large), by end user (commercial, government & civil, defense), by orbit (LEO, MEO, GEO, other orbit), by application (communication, earth observation & remote sensing, other applications), by frequency (l-band, s-band, c-band, x-band, ku-band, ka-band, q/v/e band, hf/vhf/uhf-band, laser/optical), by sub-system (satellite bus, payloads, solar panels, satellite antenna, other sub-systems) and by region (North America, Europe, Asia Pacific, Middle East, and RoW). The scope of the report covers detailed information regarding the major factors, such as drivers, restraints, challenges, and opportunities, influencing the growth of the satellites market. A detailed analysis of the key industry players has been done to provide insights into their business overview, solutions, and services; key strategies; Contracts, partnerships, agreements, new product & service launches, mergers and acquisitions, and recent developments associated with the satellites market. Competitive analysis of upcoming startups in the satellites market ecosystem is covered in this report.

Reasons to buy this report:

The report will enable market leaders/new entrants in the market to understand the approximate revenue numbers of the entire market and subsegments. This will help them in developing a complete understanding of the competitive landscape, making well-informed decisions that will place them in the market, and develop effective go-to-

market strategies. This report provides several very valuable insights into market dynamics and offers such information concerning crucial factors as a driver, restraints, challenge, and opportunity in order to help different stakeholders gauge the pulse of the market.

The report provides insights on the following pointers:

Analysis of the key driver (Expansion of public-private partnerships enhancing innovation and efficiency in space exploration, Heightened national security requirements driving investments in defense and intelligence satellites, Rising Commercialization of Low Earth Orbit (LEO) for Communication and Earth Observation Applications), restraint (Absence of unified regulations and government policies, Limited coverage and operational complexity of satellites), opportunities (Increasing government investments in space agencies, Rising demand for data analytics), and challenges (Increase in space debris, Complexity in advanced hybrid propulsion system development posing technical and operational challenges), several factors could contribute to an increase in the Satellites market.

Market Penetration: Comprehensive information on Satellites solutions offered by the top players in the market

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the Satellites market

Market Development: Comprehensive information about lucrative markets – the report analyses the satellites market across varied regions.

Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the satellites market

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players like SPACEX (US), Lockheed Martin Corporation (US), Airbus Defence and Space (Germany), Northrop Grumman (US), Thales Alenia Space (France), L3Harris Technologies, Inc., (US) Terran Orbital Corporation (US), SNC (US), MDA (Canada), OHB SE (Germany), RTX (US), Maxar Technologies (US), Mitsubishi Electric Corporation

(MELCO) (Japan), and Planet Labs PBC (US), York Space Systems (US) and Boeing (US) among others in the satellites market

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