

Space Traffic Management Market – Global Industry Size, Share, Trends Opportunity, and Forecast, Segmented By End Use (Civil and Government, Commercial, Military), By Orbit (LEO, MEO and Elliptical, GEO), By Application (Communication, Earth Observation, Navigation, Global Positioning System and Surveillance, Technology Development and Education, Others), By Region, Competition, 2019-2029F

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Abstracts

The Global Space Traffic Management Market size reached USD 9.63 Billion in 2023 and is expected to grow with a CAGR of 6.64% in the forecast period, 2025-2029. The Global Space Traffic Management (STM) Market plays a crucial role in ensuring the safe and sustainable use of space by monitoring, coordinating, and mitigating potential collisions among the increasing number of objects in Earth's orbit. With a surge in satellite launches, space debris, and commercial space activities, STM has become paramount for maintaining the long-term viability of space operations. Several key factors contribute to the comprehensive overview of the STM market.

The exponential growth of satellite constellations, both for communication and Earth observation purposes, has led to heightened concerns about space congestion and potential collisions. STM systems provide real-time tracking and coordination to avoid collisions, reducing the risk of space debris generation and protecting valuable assets in orbit. Governments, space agencies, and commercial entities are investing in STM solutions to ensure the secure and sustainable use of orbital space.

Technological advancements play a pivotal role in shaping the STM market, with innovations in satellite tracking, data analytics, and collision avoidance algorithms. Ground-based radars, optical telescopes, and space-based sensors contribute to a comprehensive space situational awareness network, enabling precise tracking of space objects. Automated collision avoidance maneuvers and predictive analytics further enhance the efficiency of STM systems, ensuring timely responses to potential collision threats.

The increasing commercialization of space activities, including private satellite launches, on-orbit servicing missions, and space tourism, intensifies the need for robust STM solutions. Regulatory bodies and international organizations are actively working on standardizing STM practices and guidelines to address the challenges posed by the growing diversity of space actors. Collaborative efforts are underway to establish norms for responsible behavior in space, emphasizing the importance of transparency, data sharing, and coordination among space-faring entities.

As space becomes a more congested and contested environment, STM is evolving into a critical component of space governance. The market is witnessing the emergence of private companies offering STM services alongside traditional space agencies. These services encompass collision prediction, conjunction analysis, and coordination of space activities. The STM market's growth is also driven by the increasing awareness of the economic and environmental consequences of space debris, prompting stakeholders to invest in proactive measures for debris mitigation and removal.

Overall, the Global Space Traffic Management (STM) Market is poised for significant growth, fueled by the rising concerns over space congestion and collisions amid the exponential growth of satellite constellations and commercial space activities. Technological advancements, collaborative efforts for standardization, and the emergence of private STM services underscore its crucial role in ensuring the safe and sustainable use of orbital space, driving the market's evolution as a critical component of space governance.

Key Market Drivers

Rapid Growth of Satellite Constellations

One of the primary drivers propelling the Global Space Traffic Management (STM) Market is the rapid growth of satellite constellations. The increasing deployment of communication and Earth observation satellites, particularly by private companies, has

amplified the complexity of space traffic. STM systems play a crucial role in monitoring and managing the trajectories of these constellations to prevent collisions and ensure the safe coexistence of numerous satellites in Earth's orbit.

Escalating Commercial Space Activities

The surge in commercial space activities, ranging from satellite launches and on-orbit servicing missions to space tourism ventures, is a significant driver for the STM market. As private entities become increasingly involved in space operations, the need for effective STM solutions grows. Commercial players recognize the importance of mitigating collision risks and adhering to space traffic regulations, driving the adoption of STM services to ensure the safe conduct of their activities in space.

Technological Advancements in Space Situational Awareness

Continuous technological advancements in space situational awareness (SSA) capabilities contribute significantly to the growth of the STM market. Innovations in ground-based radars, optical telescopes, and space-based sensors enhance the precision and accuracy of tracking space objects. Automated collision avoidance maneuvers and sophisticated predictive analytics further strengthen the overall efficiency of STM systems, allowing for timely responses to potential collision threats and contributing to the overall safety of space operations.

Increased Concerns About Space Debris

Growing concerns about space debris and its potential impact on both operational satellites and future space missions drive the demand for STM solutions. With an increasing number of defunct satellites and fragments in orbit, STM systems are essential for monitoring and predicting potential collisions, enabling space agencies and operators to take proactive measures for debris mitigation and removal. The need to address the environmental impact of space activities propels investments in STM technologies.

Proliferation of Small Satellites

The proliferation of small satellites, including CubeSats and small Earth observation satellites, is a key driver for the STM market. The sheer volume of these smaller spacecraft contributes to the complexity of space traffic and necessitates precise tracking and coordination to avoid collisions. STM systems cater to the unique

challenges posed by the proliferation of small satellites, ensuring their integration into orbital space without compromising safety.

International Collaboration for Space Governance

The emphasis on international collaboration for space governance and the establishment of norms for responsible behavior in space act as drivers for the STM market. Governments, space agencies, and industry stakeholders recognize the need for standardized STM practices and guidelines. Collaborative efforts, such as information sharing, joint coordination, and the development of international frameworks, foster a cohesive approach to space traffic management, driving the adoption of STM solutions on a global scale.

Increased Sensitivity to National Security Concerns

Heightened sensitivity to national security concerns related to space activities contributes to the demand for robust STM solutions. As space becomes a contested domain, governments and military entities prioritize the protection of critical space assets. STM systems play a crucial role in safeguarding national security interests by providing real-time tracking and analysis of space objects, ensuring the identification of potential threats and enabling timely responses.

Commercialization of Space Situational Awareness Services

The commercialization of space situational awareness services, offered by both traditional space agencies and private companies, is a driver for the STM market. Private entities are entering the space traffic management arena, providing collision prediction, conjunction analysis, and coordination services. The diversification of STM service providers contributes to market growth, offering a range of options for satellite operators and space agencies seeking effective STM solutions.

Key Market Challenges

Congestion and Collision Risks

The Global Space Traffic Management (STM) Market faces a significant challenge in coping with the increasing congestion in Earth's orbit and the associated collision risks. The proliferation of satellites, especially with the rise of mega-constellations, poses a formidable challenge for STM systems in ensuring the safe navigation and coordination

of numerous space objects to prevent collisions. The complexity of monitoring and managing a crowded orbital environment demands sophisticated solutions to mitigate the risks of accidental collisions.

Limited International Regulatory Framework

A key challenge for the STM market is the absence of a comprehensive and universally accepted international regulatory framework governing space activities. The lack of standardized rules and guidelines for space traffic management hinders the development of cohesive strategies for collision avoidance and responsible space conduct. The international community faces difficulties in achieving consensus on norms and regulations, impacting the effectiveness of STM systems in ensuring a secure and regulated space environment.

Technological Limitations in Space Situational Awareness

Despite technological advancements, there are inherent limitations in space situational awareness (SSA) capabilities that pose challenges for STM. The precision and accuracy of tracking space objects, particularly smaller debris fragments, remain areas of concern. Overcoming the limitations in SSA technologies is crucial for improving the efficacy of STM systems in detecting and predicting the movements of space objects with greater accuracy and reliability.

Responsibility and Liability Issues

The determination of responsibility and liability in the event of a space collision or incident is a complex challenge in the STM market. The lack of clear guidelines on liability for space activities and collisions complicates legal frameworks. Establishing protocols for assigning responsibility and addressing liability issues is essential to provide a legal foundation for STM operations and foster accountability among space-faring entities.

Data Sharing and Coordination Barriers

Effective space traffic management relies on real-time data sharing and coordination among diverse stakeholders, including government space agencies, commercial satellite operators, and international organizations. However, barriers to data sharing, concerns over proprietary information, and geopolitical considerations often impede seamless collaboration. Overcoming these challenges requires establishing transparent

mechanisms for data exchange and fostering international cooperation in sharing critical information for STM purposes.

Rapidly Changing Technological Landscape

The rapid evolution of space technologies, including new propulsion systems, advanced satellite designs, and emerging concepts such as on-orbit servicing, introduces uncertainties for STM systems. Keeping pace with the constantly changing technological landscape is a challenge, as STM solutions need to adapt to novel space activities and evolving satellite capabilities. Anticipating and addressing the impact of emerging technologies on STM effectiveness is crucial for the market's sustained growth.

Limited Debris Mitigation and Removal Measures

The accumulation of space debris poses an ongoing challenge for STM, necessitating effective mitigation and removal measures. The lack of widely adopted and practical strategies for debris removal hampers the efforts to reduce the space debris population. Developing cost-effective and scalable solutions for debris mitigation is critical for ensuring the long-term sustainability of space activities and enhancing the capabilities of STM systems.

Commercialization and Competing Interests

The increasing commercialization of space activities introduces competing interests and priorities among various stakeholders. Balancing commercial interests with the need for responsible space conduct presents a challenge for STM systems. Striking the right balance requires addressing divergent goals, ensuring fair access to orbital slots, and fostering collaboration between governmental and commercial entities in the development and implementation of STM solutions.

Key Market Trends

Integration of Artificial Intelligence (AI) and Machine Learning (ML)

A prominent trend in the Global Space Traffic Management (STM) Market is the integration of Artificial Intelligence (AI) and Machine Learning (ML) technologies. These advanced algorithms enhance the capabilities of STM systems by analyzing vast amounts of data from space situational awareness sensors. AI and ML enable

predictive analytics for collision risk assessments, anomaly detection, and adaptive responses, contributing to more efficient and proactive space traffic management.

Advancements in Collision Avoidance Maneuvers

Continued advancements in collision avoidance maneuvers represent a key trend in the STM market. As the complexity of space traffic increases, STM systems are incorporating more sophisticated algorithms for autonomous collision avoidance. Real-time analysis of orbital trajectories allows for precise and automated maneuvers, enabling satellites to autonomously adjust their paths to avoid potential collisions. This trend aligns with the market's focus on enhancing the responsiveness and effectiveness of collision avoidance measures.

Emergence of On-Orbit Servicing and Debris Removal Solutions

The emergence of on-orbit servicing and debris removal solutions is reshaping the STM landscape. Companies are developing technologies to actively remove defunct satellites and debris from orbit, reducing the risk of collisions and minimizing space debris. This trend reflects the industry's commitment to sustainability and mitigating the long-term environmental impact of space activities, enhancing the overall effectiveness of STM systems.

Standardization and International Collaboration

A noteworthy trend is the increasing emphasis on standardization and international collaboration in space traffic management. Recognizing the need for consistent norms and regulations, stakeholders are actively engaging in collaborative efforts to establish a global framework for responsible space conduct. Standardized practices for data sharing, coordination, and collision avoidance contribute to a more cohesive and interoperable STM ecosystem, fostering international cooperation and enhancing overall space safety.

Development of Dedicated STM Satellites

The development of dedicated STM satellites is gaining traction as a specialized solution for enhancing space situational awareness. These satellites are equipped with advanced sensors and tracking systems dedicated to monitoring and managing space traffic. The deployment of dedicated STM satellites improves the precision and timeliness of data collection, offering a focused approach to addressing the challenges

posed by increasing congestion and diversity of space objects.

Growing Role of Private Companies in STM Services

Private companies are playing an increasingly prominent role in providing STM services. This trend is characterized by the commercialization of space situational awareness solutions, collision prediction services, and overall space traffic management. As the commercial space sector expands, these companies contribute innovative approaches and technologies to the STM market, fostering competition and diversification in service offerings.

Enhanced Cybersecurity Measures for STM Systems

The growing digitization of STM systems has led to an increased focus on cybersecurity measures. As these systems rely on interconnected networks and data-sharing platforms, safeguarding against cyber threats is essential. The trend involves implementing robust cybersecurity protocols, encryption techniques, and secure communication channels to protect STM infrastructure from potential cyberattacks, ensuring the integrity and reliability of space traffic management operations.

Focus on Space Sustainability and Orbital Slot Management

The trend towards prioritizing space sustainability and effective orbital slot management is gaining momentum. Stakeholders are placing greater emphasis on optimizing the use of orbital slots, minimizing interference, and ensuring the long-term viability of space activities. This trend aligns with global efforts to prevent the creation of additional space debris and supports the responsible utilization of orbital resources, reflecting a commitment to sustainable practices in the evolving field of space traffic management.

Segmental Insights

By End Use

The 'Civil and Government' segment in the Space Traffic Management (STM) market is characterized by the involvement of government space agencies, civil space organizations, and international collaborations focused on space exploration, scientific research, and Earth observation. Governments play a pivotal role in defining space policies, regulations, and standards. STM solutions within this segment primarily aim at ensuring the safety and sustainability of government-operated satellites, space probes,

and scientific missions. Key priorities include preventing collisions, managing orbital resources responsibly, and fostering international cooperation to address common challenges in space traffic. The civil and government segment contributes to the overall development of global STM frameworks, emphasizing transparency, data sharing, and responsible space conduct.

The 'Commercial' segment is a rapidly growing and dynamic sector within the STM market, driven by the increasing involvement of private companies in space activities. Commercial entities operate a diverse range of satellites for telecommunications, Earth observation, satellite imagery, and emerging markets such as satellite-based internet services. STM solutions for the commercial sector focus on collision avoidance, orbital planning, and ensuring the reliability of satellite constellations. As the demand for commercial space services continues to rise, companies within this segment prioritize STM technologies that enable efficient space traffic management, minimize collision risks, and contribute to the sustainable use of space resources.

The 'Military' segment of the STM market encompasses the space activities and assets managed by defense and military organizations worldwide. Military satellites are critical for communication, reconnaissance, navigation, and strategic operations. STM solutions within the military segment prioritize national security by providing enhanced situational awareness, collision avoidance capabilities, and secure communication links. The military's involvement in space traffic management reflects the need for protecting critical assets from potential threats and ensuring the resilience of space-based capabilities. STM technologies in the military segment often involve classified systems, advanced analytics, and responsive maneuvering capabilities to address the unique challenges posed by defense-related space activities. The military segment contributes to the overall space domain awareness and resilience against potential adversarial actions in space.

Regional Insights

North America dominates the Space Traffic Management (STM) market, led by the United States' advanced space capabilities and significant commercial space activities. The region is home to major space agencies, private space companies, and a substantial number of satellites. The United States, with its robust space infrastructure, plays a central role in shaping global STM policies and initiatives. Collaborations between government agencies like NASA and private enterprises contribute to the development and deployment of advanced STM technologies. North America's emphasis on space sustainability, orbital debris mitigation, and responsible space

conduct underscores its leadership in the evolving landscape of space traffic management.

Europe stands as a key player in the global STM market, with countries like France, Germany, and the United Kingdom contributing to the region's prominence. The European Space Agency (ESA) plays a pivotal role in coordinating space activities and fostering international collaborations. Europe's commitment to space exploration, satellite launches, and participation in global space initiatives positions it as a significant hub for STM advancements. The region's focus on sustainability, adherence to international regulations, and investments in space situational awareness technologies contribute to the overall development of STM capabilities in Europe.

The Asia-Pacific region is witnessing rapid growth in space activities, driven by countries like China and India. China's ambitious space program, including satellite launches, lunar exploration, and the development of its space station, contributes to the increasing complexity of space traffic in the region. India, with its emerging space capabilities, is actively participating in Earth observation and satellite deployment. The Asia-Pacific region's focus on space exploration, commercial space endeavors, and the need for effective STM solutions to manage the rising number of satellites positions it as a crucial player in the global STM landscape.

The Middle East and Africa are gradually emerging as participants in the STM market. While space activities in these regions are relatively nascent compared to other parts of the world, there is a growing interest in satellite deployments for communication, Earth observation, and technological advancements. Governments in the Middle East, such as the United Arab Emirates, have made significant investments in space programs, contributing to the region's space presence. The need for STM solutions in the Middle East and Africa is driven by a combination of national development goals, economic diversification, and strategic initiatives aimed at harnessing space capabilities.

Key Market Players

Saab AB

Lockheed Martin Corporation

Northrop Grumman Corporation

BAE Systems plc

Airbus SE

The Boeing Company

RTX Corporation

L3Harris Technologies, Inc.

Report Scope:

In this report, the Global Space Traffic Management Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Space Traffic Management Market, By End Use:

- oCivil and Government

- oCommercial

- oMilitary

Space Traffic Management Market, By Orbit:

- oLEO

- oMEO

- oElliptical

- oGEO

Space Traffic Management Market,By Application:

- oCommunication

- oEarth Observation

oNavigation

oGlobal Positioning System and Surveillance

oTechnology Development and Education

oOthers

Space Traffic Management Market, By Region:

oNorth America

United States

Canada

Mexico

oEurope CIS

Germany

Spain

France

Russia

Italy

United Kingdom

Belgium

oAsia-Pacific

China

India

Japan

Indonesia

Thailand

Australia

South Korea

oSouth America

Brazil

Argentina

Colombia

oMiddle East Africa

Turkey

Iran

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Global Space Traffic Management Market.

Available Customizations:

Global Space Traffic Management Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

Contents

1.INTRODUCTION

- 1.1.Product Overview
- 1.2.Key Highlights of the Report
- 1.3.Market Coverage
- 1.4.Market Segments Covered
- 1.5.Research Tenure Considered

2.RESEARCH METHODOLOGY

- 2.1.Methodology Landscape
- 2.2.Objective of the Study
- 2.3.Baseline Methodology
- 2.4.Formulation of the Scope
- 2.5.Assumptions and Limitations
- 2.6.Sources of Research
- 2.7.Approach for the Market Study
- 2.8.Methodology Followed for Calculation of Market Size Market Shares
- 2.9.Forecasting Methodology

3.EXECUTIVE SUMMARY

- 3.1.
- 3.2.Market Forecast
- 3.3.Key Regions
- 3.4.Key Segments

4.IMPACT OF COVID-19 ON GLOBAL SPACE TRAFFIC MANAGEMENT MARKET

5.GLOBAL SPACE TRAFFIC MANAGEMENT MARKET OUTLOOK

- 5.1.Market Size Forecast
 - 5.1.1.By Value
- 5.2.Market Share Forecast
 - 5.2.1.By End Use Market Share Analysis (Civil and Government, Commercial, Military)
 - 5.2.2.By Orbit Market Share Analysis (LEO, MEO and Elliptical, GEO)
 - 5.2.3.By Application Market Share Analysis (Communication, Earth Observation,

Navigation, Global Positioning System and Surveillance, Technology Development and Education, Others)

5.2.4.By RegionalMarket Share Analysis

5.2.4.1.Asia-Pacific Market Share Analysis

5.2.4.2.Europe CIS Market Share Analysis

5.2.4.3.North America Market Share Analysis

5.2.4.4.South America Market Share Analysis

5.2.4.5.Middle East Africa Market Share Analysis

5.2.5.By Company Market Share Analysis (Top 5 Companies, Others - By Value, 2023)

5.3.Global Space Traffic Management MarketMapping Opportunity Assessment

5.3.1.By End Use MarketMapping Opportunity Assessment

5.3.2.By Orbit Market Mapping Opportunity Assessment

5.3.3.By Application Market Mapping Opportunity Assessment

5.3.4.By Regional Market Mapping Opportunity Assessment

6.ASIA-PACIFIC SPACE TRAFFIC MANAGEMENT MARKET OUTLOOK

6.1.Market Size Forecast

6.1.1.By Value

6.2.Market Share Forecast

6.2.1.By End Use Market Share Analysis

6.2.2.By Orbit Market Share Analysis

6.2.3.By Application Market Share Analysis

6.2.4.By Country Market Share Analysis

6.2.4.1.China Market Share Analysis

6.2.4.2.India Market Share Analysis

6.2.4.3.Japan Market Share Analysis

6.2.4.4.Indonesia Market Share Analysis

6.2.4.5.Thailand Market Share Analysis

6.2.4.6.South Korea Market Share Analysis

6.2.4.7.Australia Market Share Analysis

6.2.4.8.Rest of Asia-Pacific Market Share Analysis

6.3.Asia-Pacific: Country Analysis

6.3.1.China Space Traffic Management Market Outlook

6.3.1.1.Market Size Forecast

6.3.1.1.1.By Value

6.3.1.2.Market Share Forecast

6.3.1.2.1.By End Use Market Share Analysis

- 6.3.1.2.2.By Orbit Market Share Analysis
- 6.3.1.2.3.By Application MarketShare Analysis
- 6.3.2.India Space Traffic Management Market Outlook
 - 6.3.2.1.Market Size Forecast
 - 6.3.2.1.1.By Value
 - 6.3.2.2.Market Share Forecast
 - 6.3.2.2.1.By End Use Market Share Analysis
 - 6.3.2.2.2.By Orbit Market Share Analysis
 - 6.3.2.2.3.By Application MarketShare Analysis
- 6.3.3.Japan Space Traffic Management Market Outlook
 - 6.3.3.1.Market Size Forecast
 - 6.3.3.1.1.By Value
 - 6.3.3.2.Market Share Forecast
 - 6.3.3.2.1.By End Use Market Share Analysis
 - 6.3.3.2.2.By Orbit Market Share Analysis
 - 6.3.3.2.3.By Application MarketShare Analysis
- 6.3.4.Indonesia Space Traffic Management Market Outlook
 - 6.3.4.1.Market Size Forecast
 - 6.3.4.1.1.By Value
 - 6.3.4.2.Market Share Forecast
 - 6.3.4.2.1.By End Use Market Share Analysis
 - 6.3.4.2.2.By Orbit Market Share Analysis
 - 6.3.4.2.3.By Application Market Share Analysis
- 6.3.5.Thailand Space Traffic Management Market Outlook
 - 6.3.5.1.Market Size Forecast
 - 6.3.5.1.1.By Value
 - 6.3.5.2.Market Share Forecast
 - 6.3.5.2.1.ByEnd UseMarket Share Analysis
 - 6.3.5.2.2.By Orbit Market Share Analysis
 - 6.3.5.2.3.By Application Market Share Analysis
- 6.3.6.South Korea Space Traffic Management Market Outlook
 - 6.3.6.1.Market Size Forecast
 - 6.3.6.1.1.By Value
 - 6.3.6.2.Market Share Forecast
 - 6.3.6.2.1.By End Use Market Share Analysis
 - 6.3.6.2.2.By Orbit Market Share Analysis
 - 6.3.6.2.3.By Application Market Share Analysis
- 6.3.7.Australia Space Traffic Management Market Outlook
 - 6.3.7.1.Market Size Forecast

- 6.3.7.1.1.By Value
- 6.3.7.2.Market Share Forecast
 - 6.3.7.2.1.By End Use Market Share Analysis
 - 6.3.7.2.2.By Orbit Market Share Analysis
 - 6.3.7.2.3.By Application Market Share Analysis

7.EUROPE CIS SPACE TRAFFIC MANAGEMENT MARKET OUTLOOK

- 7.1.Market Size Forecast
 - 7.1.1.By Value
- 7.2.Market Share Forecast
 - 7.2.1.By End Use Market Share Analysis
 - 7.2.2.By Orbit Market Share Analysis
 - 7.2.3.By Application Market Share Analysis
 - 7.2.4.By Country Market Share Analysis
 - 7.2.4.1.Germany Market Share Analysis
 - 7.2.4.2.Spain Market Share Analysis
 - 7.2.4.3.France Market Share Analysis
 - 7.2.4.4.Russia Market Share Analysis
 - 7.2.4.5.Italy Market Share Analysis
 - 7.2.4.6.United Kingdom Market Share Analysis
 - 7.2.4.7.Belgium Market Share Analysis
 - 7.2.4.8.Rest of Europe CIS Market Share Analysis
- 7.3.Europe CIS: Country Analysis
 - 7.3.1.Germany Space Traffic Management Market Outlook
 - 7.3.1.1.Market Size Forecast
 - 7.3.1.1.1.By Value
 - 7.3.1.2.Market Share Forecast
 - 7.3.1.2.1.By End Use Market Share Analysis
 - 7.3.1.2.2.By Orbit Market Share Analysis
 - 7.3.1.2.3.By Application Market Share Analysis
 - 7.3.2.Spain Space Traffic Management Market Outlook
 - 7.3.2.1.Market Size Forecast
 - 7.3.2.1.1.By Value
 - 7.3.2.2.Market Share Forecast
 - 7.3.2.2.1.By End Use Market Share Analysis
 - 7.3.2.2.2.By Orbit Market Share Analysis
 - 7.3.2.2.3.By Application Market Share Analysis
 - 7.3.3.France Space Traffic Management Market Outlook

- 7.3.3.1.Market Size Forecast
 - 7.3.3.1.1.By Value
- 7.3.3.2.Market Share Forecast
 - 7.3.3.2.1.By End Use Market Share Analysis
 - 7.3.3.2.2.By Orbit Market Share Analysis
 - 7.3.3.2.3.By Application Market Share Analysis
- 7.3.4.Russia Space Traffic Management Market Outlook
 - 7.3.4.1.Market Size Forecast
 - 7.3.4.1.1.By Value
 - 7.3.4.2.Market Share Forecast
 - 7.3.4.2.1.By End Use Market Share Analysis
 - 7.3.4.2.2.By Orbit Market Share Analysis
 - 7.3.4.2.3.By Application Market Share Analysis
- 7.3.5.Italy Space Traffic Management Market Outlook
 - 7.3.5.1.Market Size Forecast
 - 7.3.5.1.1.By Value
 - 7.3.5.2.Market Share Forecast
 - 7.3.5.2.1.By End Use Market Share Analysis
 - 7.3.5.2.2.By Orbit Market Share Analysis
 - 7.3.5.2.3.By Application Market Share Analysis
- 7.3.6.United Kingdom Space Traffic Management Market Outlook
 - 7.3.6.1.Market Size Forecast
 - 7.3.6.1.1.By Value
 - 7.3.6.2.Market Share Forecast
 - 7.3.6.2.1.By End Use Market Share Analysis
 - 7.3.6.2.2.By Orbit Market Share Analysis
 - 7.3.6.2.3.By Application Market Share Analysis
- 7.3.7.Belgium Space Traffic Management Market Outlook
 - 7.3.7.1.Market Size Forecast
 - 7.3.7.1.1.By Value
 - 7.3.7.2.Market Share Forecast
 - 7.3.7.2.1.By End Use Market Share Analysis
 - 7.3.7.2.2.By Orbit Market Share Analysis
 - 7.3.7.2.3.By Application Market Share Analysis

8.NORTH AMERICA SPACE TRAFFIC MANAGEMENT MARKET OUTLOOK

- 8.1.Market Size Forecast
 - 8.1.1.By Value

8.2. Market Share Forecast

- 8.2.1. By End Use Market Share Analysis
- 8.2.2. By Orbit Market Share Analysis
- 8.2.3. By Application Market Share Analysis
- 8.2.4. By Country Market Share Analysis
 - 8.2.4.1. United States Market Share Analysis
 - 8.2.4.2. Mexico Market Share Analysis
 - 8.2.4.3. Canada Market Share Analysis

8.3. North America: Country Analysis

- 8.3.1. United States Space Traffic Management Market Outlook
 - 8.3.1.1. Market Size Forecast
 - 8.3.1.1.1. By Value
 - 8.3.1.2. Market Share Forecast
 - 8.3.1.2.1. By End Use Market Share Analysis
 - 8.3.1.2.2. By Orbit Market Share Analysis
 - 8.3.1.2.3. By Application Market Share Analysis
- 8.3.2. Mexico Space Traffic Management Market Outlook
 - 8.3.2.1. Market Size Forecast
 - 8.3.2.1.1. By Value
 - 8.3.2.2. Market Share Forecast
 - 8.3.2.2.1. By End Use Market Share Analysis
 - 8.3.2.2.2. By Orbit Market Share Analysis
 - 8.3.2.2.3. By Application Market Share Analysis
- 8.3.3. Canada Space Traffic Management Market Outlook
 - 8.3.3.1. Market Size Forecast
 - 8.3.3.1.1. By Value
 - 8.3.3.2. Market Share Forecast
 - 8.3.3.2.1. By End Use Market Share Analysis
 - 8.3.3.2.2. By Orbit Market Share Analysis
 - 8.3.3.2.3. By Application Market Share Analysis

9. SOUTH AMERICA SPACE TRAFFIC MANAGEMENT MARKET OUTLOOK

- 9.1. Market Size Forecast
 - 9.1.1. By Value
- 9.2. Market Share Forecast
 - 9.2.1. By End Use Market Share Analysis
 - 9.2.2. By Orbit Market Share Analysis
 - 9.2.3. By Application Market Share Analysis

- 9.2.4.By Country Market Share Analysis
 - 9.2.4.1.Brazil Market Share Analysis
 - 9.2.4.2.Argentina Market Share Analysis
 - 9.2.4.3.Colombia Market Share Analysis
 - 9.2.4.4.Rest of South America Market Share Analysis
- 9.3.South America: Country Analysis
 - 9.3.1.Brazil Space Traffic Management Market Outlook
 - 9.3.1.1.Market Size Forecast
 - 9.3.1.1.1.By Value
 - 9.3.1.2.Market Share Forecast
 - 9.3.1.2.1.By End Use Market Share Analysis
 - 9.3.1.2.2.By Orbit Market Share Analysis
 - 9.3.1.2.3.By Application Market Share Analysis
 - 9.3.2.Colombia Space Traffic Management Market Outlook
 - 9.3.2.1.Market Size Forecast
 - 9.3.2.1.1.By Value
 - 9.3.2.2.Market Share Forecast
 - 9.3.2.2.1.By End Use Market Share Analysis
 - 9.3.2.2.2.By Orbit Market Share Analysis
 - 9.3.2.2.3.By Application Market Share Analysis
 - 9.3.3.Argentina Space Traffic Management Market Outlook
 - 9.3.3.1.Market Size Forecast
 - 9.3.3.1.1.By Value
 - 9.3.3.2.Market Share Forecast
 - 9.3.3.2.1.By End Use Market Share Analysis
 - 9.3.3.2.2.By Orbit Market Share Analysis
 - 9.3.3.2.3.By Application Market Share Analysis

10.MIDDLE EAST AFRICA SPACE TRAFFIC MANAGEMENT MARKET OUTLOOK

- 10.1.Market Size Forecast
 - 10.1.1.By Value
- 10.2.Market Share Forecast
 - 10.2.1.By End Use Market Share Analysis
 - 10.2.2.By Orbit Market Share Analysis
 - 10.2.3.By Application Market Share Analysis
 - 10.2.4.By Country Market Share Analysis
 - 10.2.4.1.Turkey Market Share Analysis
 - 10.2.4.2.Iran Market Share Analysis

- 10.2.4.3.Saudi Arabia Market Share Analysis
- 10.2.4.4.UAE Market Share Analysis
- 10.2.4.5.Rest of Middle East Africa Market ShareAnalysis
- 10.3.Middle East Africa: Country Analysis
 - 10.3.1.Turkey Space Traffic Management Market Outlook
 - 10.3.1.1.Market Size Forecast
 - 10.3.1.1.1.By Value
 - 10.3.1.2.Market Share Forecast
 - 10.3.1.2.1.By End Use Market Share Analysis
 - 10.3.1.2.2.By Orbit Market Share Analysis
 - 10.3.1.2.3.By Application Market Share Analysis
 - 10.3.2.Iran Space Traffic Management Market Outlook
 - 10.3.2.1.Market Size Forecast
 - 10.3.2.1.1.By Value
 - 10.3.2.2.Market Share Forecast
 - 10.3.2.2.1.By End Use Market Share Analysis
 - 10.3.2.2.2.By Orbit Market Share Analysis
 - 10.3.2.2.3.By Application Market Share Analysis
 - 10.3.3.Saudi Arabia Space Traffic Management Market Outlook
 - 10.3.3.1.Market Size Forecast
 - 10.3.3.1.1.By Value
 - 10.3.3.2.Market Share Forecast
 - 10.3.3.2.1.By End Use Market Share Analysis
 - 10.3.3.2.2.By Orbit Market Share Analysis
 - 10.3.3.2.3.By Application Market Share Analysis
 - 10.3.4.UAE Space Traffic Management Market Outlook
 - 10.3.4.1.Market Size Forecast
 - 10.3.4.1.1.By Value
 - 10.3.4.2.Market Share Forecast
 - 10.3.4.2.1.By End Use Market Share Analysis
 - 10.3.4.2.2.By Orbit Market Share Analysis
 - 10.3.4.2.3.By Application Market Share Analysis

11.SWOT ANALYSIS

- 11.1.Strength
- 11.2.Weakness
- 11.3.Opportunities
- 11.4.Threats

12.MARKET DYNAMICS

12.1.Market Drivers

12.2.Market Challenges

13.MARKET TRENDS AND DEVELOPMENTS

14.COMPETITIVE LANDSCAPE

14.1.Company Profiles (Up to 10 Major Companies)

14.1.1.Saab AB

14.1.1.1.Company Details

14.1.1.2.Key Product Offered

14.1.1.3.Financials (As Per Availability)

14.1.1.4.Recent Developments

14.1.1.5.Key Management Personnel

14.1.2.Lockheed Martin Corporation

14.1.2.1.Company Details

14.1.2.2.Key Product Offered

14.1.2.3.Financials (As Per Availability)

14.1.2.4.Recent Developments

14.1.2.5.Key Management Personnel

14.1.3.Northrop Grumman Corporation

14.1.3.1.Company Details

14.1.3.2.Key Product Offered

14.1.3.3.Financials (As Per Availability)

14.1.3.4.Recent Developments

14.1.3.5.Key Management Personnel

14.1.4.BAE Systems plc

14.1.4.1.Company Details

14.1.4.2.Key Product Offered

14.1.4.3.Financials (As Per Availability)

14.1.4.4.Recent Developments

14.1.4.5.Key Management Personnel

14.1.5.Airbus SE

14.1.5.1.Company Details

14.1.5.2.Key Product Offered

14.1.5.3.Financials (As Per Availability)

- 14.1.5.4.Recent Developments
- 14.1.5.5.Key Management Personnel
- 14.1.6.The Boeing Company
 - 14.1.6.1.Company Details
 - 14.1.6.2.Key Product Offered
 - 14.1.6.3.Financials (As Per Availability)
 - 14.1.6.4.Recent Developments
 - 14.1.6.5.Key Management Personnel
- 14.1.7.RTX Corporation
 - 14.1.7.1.Company Details
 - 14.1.7.2.Key Product Offered
 - 14.1.7.3.Financials (As Per Availability)
 - 14.1.7.4.Recent Developments
 - 14.1.7.5.Key Management Personnel
- 14.1.8.L3Harris Technologies, Inc.
 - 14.1.8.1.Company Details
 - 14.1.8.2.Key Product Offered
 - 14.1.8.3.Financials (As Per Availability)
 - 14.1.8.4.Recent Developments
 - 14.1.8.5.Key Management Personnel

15.STRATEGIC RECOMMENDATIONS

- 15.1.Key Focus Areas
 - 15.1.1.Target Regions
 - 15.1.2.Target Application
 - 15.1.3.Target End Use

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