

# **Satellite Optical Ground Station Market Forecast to 2028 - COVID-19 Impact and Global Analysis by Operation (Laser Satcom and Optical Operations), Equipment (Consumer Equipment and Network Equipment), Application (Laser Operations, Debris Identification, Earth Observation, and Space Situational Awareness), and End User (Government and Military and Commercial Enterprises)**

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## **Abstracts**

The satellite optical ground station market is expected to grow from US\$ 57.3 billion in 2022 to US\$ 113.3 billion by 2028; it is estimated to grow at a CAGR of 8.4% from 2023 to 2028.

All non-functional artificial materials orbiting the Earth at different altitudes can be termed space debris. Debris includes rocket body parts, fragmentation debris, refuse created during crewed missions, exhaust products from rockets, and defunct satellites. Most of such debris orbit the Earth at an average speed above 26,000 km per hour in Low Earth Orbits (LEO), posing a severe threat of collision for functional space assets, which rise the demand to monitor it, fueling the growth of the satellite optical ground station market. Such threats increase with each rocket launch for LEO and deep space. Growing collision threats of space objects are a persistent problem for the safe and sustainable use of outer space. These threats restrict unhindered access to space and prompt relevant parties to take necessary steps to mitigate risk. In November 2021, the Russian military conducted an anti-satellite test (ASAT) and blew up its defunct Cosmos 1408 satellite (which was launched in 1982) with a Nudol missile. Immediately after the blast, American and Russian astronauts aboard the International Space Station had to

take preventive measures to avoid being struck by debris from the satellite, as the International Space Station was supposedly reasonably close to the satellite. In June 2022, International Space Station again had to undertake a collision avoidance maneuver (CAM) to avoid the orbital debris from the destroyed satellite. An uncrewed Progress 81 cargo ship was used by Russia's space agency Roscosmos to move the space station from the path of the debris. In 2021, ISRO carried out 19 CAMs, compared to 12 and 8 CAMs in 2020 and 2019, respectively. Thus, such initiatives will further boost the growth of the satellite optical ground station market.

In 2021, Space Track reported four on-orbit breakup events generating 150 fragment debris and two collision events producing 942 objects, including that from the Russian ASAT test. These orbiting space debris threaten ~3,000 functioning satellites presently in orbit, used for modern critical communication and other purposes. Any damage, even minor, to such space assets can have cascading impacts on many vital systems, including communication, transportation, time scheduling, and critical defense-related aspects. Many state-of-the-art defense technologies such as guided missiles, drones, intelligence data collections, encrypted communications, and navigation would be limited or can become inoperable with defunct satellite systems. It is thus crucial to analyze the comparative approach of all space objects to detect collision threats well in advance. The optical ground station helps monitor the space environment, provides data if there are any threats to space activities, and helps implement necessary mitigation measures to safeguard functional space assets. Furthermore, it plays a crucial role in ensuring safe and sustainable space activities complying with domestic and international guidelines, standards, and other norms. Thus, the increasing amount of space debris is raising the demand for optical ground stations for monitoring space activities and protecting active space assets, boosting the growth of the satellite optical ground station market.

### Impact of COVID-19 Pandemic on Satellite Optical Ground Station Market

China, India, Japan, and South Korea are among the Asia Pacific countries that were adversely affected by the COVID-19 pandemic which impacted the satellite optical ground station market growth. Lockdown and the slowdown of industrial activities disrupted the supply chain in these countries. In addition, most of the manufacturing activities were affected, hampering the growth of the satellite optical ground station market during the pandemic period. However, in Q1 of 2021, with the ease of government restrictions, manufacturing operations restarted, fueling the growth of the satellite optical ground station market. Post-lockdown, the demand for optical ground stations increased due to the rising need for high-speed communication. The

governments of various countries are promoting the construction of new and advanced optical ground stations in the region, propelling the growth of the satellite optical ground station market. For instance, in March 2023, ISRO and Bhutan government inaugurated the ground station of the Indo-Bhutan satellite. This ground-based facility will help in communicating with and receiving information sent by satellite. Thus, the growing adoption of ground stations by the government of different Asia Pacific countries will further propel the growth of the satellite optical ground station market during the forecast period.

China is planning to become a great space power by 2030, for which various Chinese space agencies and organizations are working on various space megaprojects. The country uses these new launch satellites for redundant constellations of communications, datalinks, navigation, and remote sensing for economic growth and supporting military operations, propelling the growth of the satellite optical ground station market. As more satellites are put into orbit by China, there is more need to track objects that might threaten them. To enhance its space situational awareness system, China has planned many new ground-based optical observatories in western regions that have lower light and air pollution and higher altitudes. Furthermore, NAOC is building new facilities at Lenghu in Qinghai Province to include optical and infrared telescopes. Thus, the growing satellite launches, and expansion of space awareness stations is further boosting the satellite optical ground station market growth in China.

Thales SA, Ball Corp, AAC Clyde Space AB, Hensoldt AG, General Atomics Aeronautical Systems Inc, Tesat-Spacecom GmbH & Co KG, The European Space Agency, ODYSSEUS SPACE SA, Mynaric AG, and Comtech Telecomm Corp are among the key satellite optical ground station market players profiled during the study on the market. Several other major satellite optical ground station market players were studied and analyzed during this market research study.

The increasing need for higher-resolution data for missions that require scientists to get a detailed look at the Earth and solar system results in the high demand for OGS systems. The system also helps in providing large volumes of data to fulfill mission requirements and locate the ground assets relating to mission orbit parameters. Thus, the demand for OGSs is increasing globally for more accuracy and high-speed data transfer. In addition, the rising number of satellites launches globally is spurring the demand for optical ground stations to track and monitor the movement of satellites and simultaneously receive and transmit data, fueling the growth of the satellite optical ground station market. Also, advanced OGSs are garnering demand for they help in monitoring these satellites, boosting the growth of the satellite optical ground station

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