

EARTH OBSERVATION REQUIREMENTS & SOLUTIONS IN LATIN AMERICA

A supply/demand analysis of the Earth observation sector in the Latin America region

2015 Edition | A Euroconsult **Executive Report**

A comprehensive assessment of strategic trends in one of the most rapidly growing satellite markets.

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The Latin American Earth Observation (EO) market is undergoing significant expansion brought about by growing demand for EO data and services, along with governments' growing investment into the application to support this demand and help to develop national EO industries. In this regard, the region is considered one of the most dynamic markets globally.

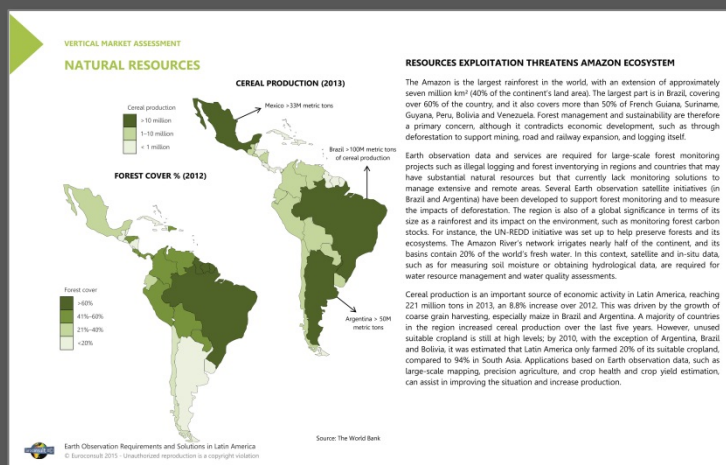
As of 2014 combined national investment into EO systems developed is \$193 million. This number is expected to increase substantially as further countries in the region are expected to invest in the application, and current investing countries expand their satellite portfolios. Consequently, the number of Earth observation satellites launched from Latin American programs is anticipated to grow to more than 25 over the coming decade, compared to just six launched in the last ten years.

Demand for EO data has also increased significantly. The data market in Latin America is estimated at \$145 million in 2014; nearly half of all data sales are attributed to the defense sector, with natural resources monitoring, infrastructure and engineering, and energy following. Brazil represents the largest national market, totaling a third of all data sales, followed by Mexico.

Demand is foreseen to continue to grow strongly, with a 10% CAGR forecast over 2014-2024, leading to a \$355 million commercial data market. Multiple factors are expected to support this growth:

- Robust demand from defense. Although impacted by the gradual increase of national proprietary systems, this supply is not expected to fulfill all regional demand for image intelligence solutions.

- Demand in natural resources mainly related to national forest monitoring programs, especially in Brazil and Mexico, although countries such as Argentina, Chile, and Colombia are also increasing demand for forestry and agriculture.
- Infrastructure and engineering demand driven by Brazil and Mexico and their plans to invest billions of dollars in development projects over the next decade. Colombia and Chile are also foreseen to undertake projects to update road networks and public transport infrastructure.
- Demand in the energy (oil, gas, minerals) sector mainly in Brazil, Mexico, and Chile. Countries will be effected in the short term related to the drop in oil prices; however, the region remains resource-rich with new ventures expected to emerge.



ABOUT EARTH OBSERVATION REQUIREMENTS & SOLUTIONS IN LATIN AMERICA 2015

HIGHLIGHTS OF THE REPORT:

The Executive Report is a detailed assessment of strategic trends in Latin America's competitive satellite market. It includes a review of the complete value chain, from service development and equipment rollout in four key vertical segments to the supply and use of satellite capacity. In addition to regional trends within three sub-regions, the report includes five profiles of key national markets in Latin America.

VERTICAL SEGMENTS

- Defense
- Natural Resources Monitoring
- Energy
- Infrastructure and Engineering

COUNTRY PROFILES

- Brazil
- Mexico
- Colombia
- Chile
- Argentina

METHODOLOGY

The analysis, data and estimates for this report are derived from three main sources:

- Euroconsult's internal databases and personnel experience: From our continuous monitoring of the Earth observation market, we have built an in-depth analysis into the trends and forecasts within the Earth observation sector.
- Interviews with commercial operators and data distributors spread over the region: These executive-level discussions bring in-depth understanding of the dynamics, drivers, inhibitors and developing factors of the Earth observation sector.
- Desk research on publicly available information: Our experience allows us to find and synthesize any available information as it comes and to cross-check it to the maximum extent.

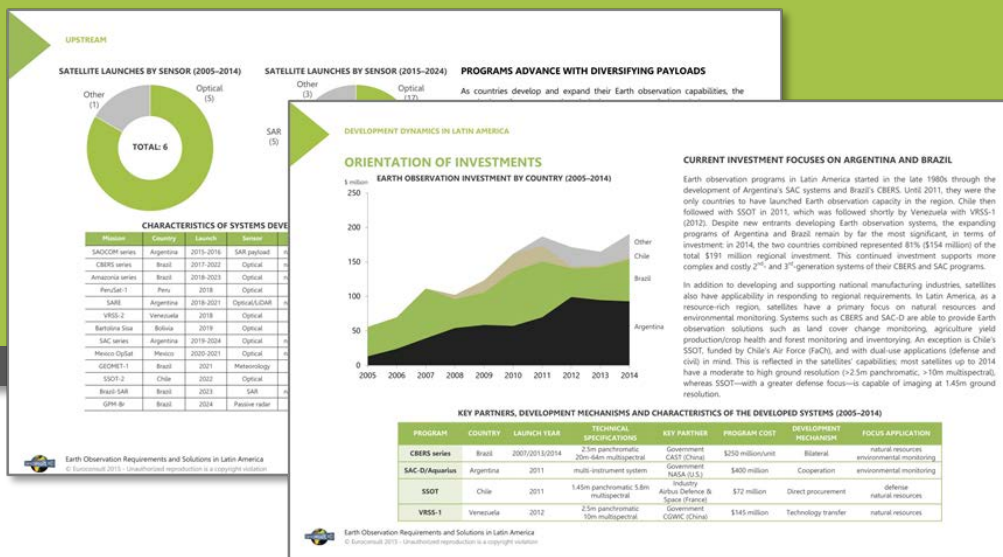


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