PROSPECTS FOR THE SMALL SATELLITE MARKET


A global supply and demand analysis of government and commercial satellites up to 500 kg from the world leading supplier of research in the satellite sector.

✓ Over 95 pages, including numerous graphs & tables
✓ Thousands of data points
✓ Price starting at € 4,000

Euroconsult anticipates that about 7,000 smallsats will be launched, at an average of 580/year by 2022 growing to an average of 820/year by 2027. Euroconsult’s forecast for the next ten years increased by 13% over last edition of this report highlighting the untapped potential of several applications and regions of the world. The future smallsat market will be driven by the rollout of several constellations, mainly for commercial operators for Earth observation, communications and data collection services. Constellations will account for 82% of the 7,000 smallsats to be launched. The constellations market is cyclical with strong year-to-year variations driven by their initial deployment in batches within a short period of time in order to begin services as soon as possible. The market for single satellites (about 1,250 units) is more distributed over time.

Satellite manufacturing will represent 58% of the $38 billion future market, i.e. $22 billion, with the remainder for launch services. Most of the smallsat manufacturing market is placed with large or small integrators that are independent of the operators of the satellites. In-house manufacturing remains the rule for most satellites below 50 kg and for academic cubesats.

Miniaturization and technology improvements offer smallsat customers the choice between increasingly lighter satellites (at equivalent performance) or more capable satellites with mass increase because of improved capabilities (lifetime, propulsion, stabilization..). Thanks to these improvements, cubesats are now able to deliver operational services while, in the heaviest mass category, 500 kg satellites can deliver more than some 1-ton satellites were doing in the past.
ABOUT SMALLSATS

Prospects for the Small Satellite Market presents the various factors that will drive/inhibit growth in demand for small satellites over the next 10 years. This report considers satellites by four mass categories, six regions, six satellite applications and five manufacturer typologies.

EXTENSIVE FIGURES & ANALYSIS FOR THE COMING DECADE

All Euroconsult reports have, at their core, data derived from over 30 years of tracking all levels of the satellite/space value chain. To this we add dozens of dedicated industry interviews each year, along with the continual refinement of our data models, and the collection and interpretation of company press releases and financial filings. Our consultants have decades of experience interpreting and analyzing our proprietary databases in light of the broader value chain.

When you purchase research from Euroconsult, you receive thousands of data points and the expert interpretation of what this means for specific verticals and sectors of the satellite value chain, including forecasts based on years of data and highly refined models.

This report contains thousands of data points.

METHODOLOGY:

The forecast of smallsats to be launched over the next 10 years (2018-2027) has been built on the basis of a qualitative and quantitative analysis conducted from two sources:

✓ A dedicated database with all satellites between 1kg and 500kg of launch mass that have been launched between 2008 and 2017 and are now in development or forecast to be launched between 2018 and 2027. The database is critical for characterizing the changes in demand for smallsats over the next decade.

✓ A combination of primary and secondary research to characterize the changes that have occurred and that may occur in the industry, including different funding bodies of smallsats systems (civilian, academic, defense and commercial organizations) and the industry structure to support these evolutions in both satellite manufacture and launch.

REPORT STRUCTURE

ANALYSIS

WHO WILL BENEFIT FROM THIS REPORT:

✓ Satellite integrators
✓ Launch vehicle manufacturers & service providers
✓ Satellite & launch vehicle equipment companies
✓ Space agencies
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