

Asia-Pacific Satellite Attitude and Orbit Control System - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

Market Report | 2024-02-17 | 155 pages | Mordor Intelligence

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Report description:

The Asia-Pacific Satellite Attitude and Orbit Control System Market size is estimated at USD 0.69 billion in 2024, and is expected to reach USD 1.54 billion by 2029, growing at a CAGR of 17.42% during the forecast period (2024-2029).

Satellites that are being launched into LEO are driving the market demand

- Satellite AOCS plays a critical role in maintaining the stability and precision of satellites in different orbits. The demand for LEO satellites has been growing rapidly in recent years, driven by advances in space technology and the increasing need for global connectivity. AOCS plays a crucial role in maintaining the stability and precision of LEO satellites, especially as they orbit at high speeds and are subject to various external forces, including atmospheric drag and solar radiation. As a result, there is a growing demand for AOCS for LEO satellites in the Asia-Pacific region, with China, Japan, India, and South Korea investing heavily in space-based technologies. During 2017-2022, approximately 379 satellites were launched into LEO.

- GEO satellites orbit at higher altitudes and are primarily used for broadcasting and communications. Owing to the growing demand for high-speed internet and digital communication, the demand for GEO satellites has risen in the Asia-Pacific region. During 2017-2022, approximately 66 satellites were launched into GEO.

- The Asia-Pacific region also experienced a rise in demand for MEO satellites, owing to the growing requirement for accurate and dependable navigation systems in several industries, including aviation, maritime, and defence. As a result, the region is seeing an increase in demand for AOCS for MEO satellites, with China, Japan, and South Korea spending considerably on navigation and positioning systems. During 2017-2022, approximately 24 satellites were launched into MEO. The overall market is expected to grow by 18.42% from 2023 to 2029.

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Asia-Pacific Satellite Attitude and Orbit Control System Market Trends

The trend for better fuel and operational efficiency with respect to satellite mass was witnessed in the region

- The mass of a satellite has a significant impact on the launch of the satellite. This is because the heavier the satellite, the more fuel and energy are required to launch it into space. Launching a satellite involves accelerating it to a very high speed, typically around 28,000 kilometers per hour, to place it in orbit around the Earth. The amount of energy required to achieve this speed is proportional to the satellite's mass.
- As a result, a heavier satellite requires a larger rocket and more fuel to launch it into space. This, in turn, increases the cost of the launch and can also limit the types of launch vehicles that can be used. The primary classification types according to mass are large satellites that are more than 1,000 kg. During 2017-2022, around 75+ large satellites launched were owned by North American organizations. A medium-sized satellite has a mass between 500 and 1000 kg. Asia-Pacific organizations operated more than 65+ satellites launched. Similarly, satellites that have a group of less than 500 kg are considered small satellites, and around 200+ small satellites were launched in this region.
- Overall, the mass of a satellite significantly impacts its launch, requiring more energy and fuel to launch a heavier satellite, which increases the cost and can limit the launch options available. The number of operating satellites in the Asia-Pacific region is projected to surge during 2023-2029 due to the growing demand from the commercial and military space sectors.

The increasing space expenditures of different space agencies are expected to impact the market positively

- AOCS controls a three-axis stable Earth-pointing attitude in all mission modes and measures spacecraft velocity and orbital position. Considering the increase in space-related activities in the Asia-Pacific region, satellite manufacturers are enhancing their satellite production capabilities to tap into the rapidly emerging market potentials. The prominent Asia-Pacific countries with robust space infrastructure are China, India, Japan, and South Korea.
- China National Space Administration (CNSA) announced space exploration priorities during 2021-2025, including enhancing national civil space infrastructure and ground facilities. As a part of this plan, the Chinese government established China Satellite Network Group Co. Ltd to develop a 13,000-satellite constellation for satellite internet.
- In Asia-Pacific, only China, India, and Japan have full end-to-end space capacity and complete space infrastructure space technology (communication, Earth observation (EO), and navigation satellites), satellite manufacturing, rockets, and spaceports. Other countries in the region must rely on international cooperation to carry out their respective space programs. This is expected to change to some extent in the coming years, although many countries in the region are developing indigenous space capabilities as part of their latest agile strategies. In June 2022, South Korea launched the Nuri rocket, putting six satellites into orbit, making it the seventh country in the world to successfully launch a payload weighing more than one metric ton onto an air launch vehicle.

Asia-Pacific Satellite Attitude and Orbit Control System Industry Overview

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The Asia-Pacific Satellite Attitude and Orbit Control System Market is moderately consolidated, with the top five companies occupying 55%. The major players in this market are AAC Clyde Space, Jena-Optronik, SENER Group, Sitael S.p.A. and Thales (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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