

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

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Report description:

The Europe Satellite Attitude and Orbit Control System Market size is estimated at USD 117.87 million in 2024, and is expected to reach USD 255.79 million by 2029, growing at a CAGR of 16.76% during the forecast period (2024-2029).

LEO satellites are driving the market demand by occupying a significant share of 73.6% in 2029

- In Europe, the AOCS market for LEO, MEO, and GEO satellites is driven by increasing investments in satellite-based services, such as communication, Earth observation, and navigation, which require high-precision positioning and orientation of satellites.
- LEO satellites are used for applications such as Earth observation, remote sensing, and scientific research. The growing demand for high-resolution satellite imagery and remote sensing data is expected to drive the LEO segment. The market is also driven by the rising number of small satellites being launched into orbit, which require efficient and cost-effective AOCS. Between 2017 and 2022, approximately 531 satellites were launched into LEO.
- GEO satellites are used for applications like communication, broadcasting, and weather forecasting. The demand for high-speed internet connectivity and digital broadcasting is expected to drive the growth of the AOCS market for GEO satellites. Key players in the market include Airbus Defence and Space, Lockheed Martin, and Northrop Grumman. Between 2017 and 2022, approximately 16 satellites were launched into GEO.
- MEO satellites are used for global navigation satellite systems (GNSS) like GPS, Galileo, and BeiDou. The increasing demand for GNSS applications in various industries, such as automotive, aviation, and maritime, is expected to drive the growth of the AOCS market for MEO satellites. Thales Alenia Space, OHB System AG, and RUAG Space are some of the leading companies providing AOCS for MEO satellites. Between 2017 and 2022, approximately 16 satellites were launched into MEO. The segment is expected to record a 15% CAGR during the forecast period.

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Europe Satellite Attitude and Orbit Control System Market Trends

Small satellites are poised to generate demand in the market

- The classification of spacecraft by mass is one of the primary metrics for determining the launch vehicle size and the cost of launching satellites into orbit. The success of a satellite mission depends heavily on the accuracy of its pre-flight mass measurement and the proper balance of the satellite in order to generate mass within limits. Satellites are classified according to their mass. The main mass classifications include large satellites that weigh over 1,000 kg. Between 2017 and 2022, more than 35 large satellites belonging to European organizations were launched. A medium-sized satellite has a mass between 500 and 1,000 kg, and European organizations operated more than 15 such satellites launched during 2017-2022. Similarly, satellites with a mass of less than 500 kg are considered small satellites, and about 460+ small satellites have been launched from this region.
- There is a growing trend toward smaller satellites in the region due to their shorter development times, which can reduce overall mission costs. They have made it possible to significantly reduce the time required to obtain scientific and technological results. Small spacecraft missions tend to be more flexible and thus can better respond to new technological opportunities or needs. The small satellite industry in Europe is supported by a robust framework for the design and manufacturing of small satellites tailored to serve specific applications. The number of operations in the European region is expected to increase between 2023 and 2029, driven by growing demand in the commercial and military space industries.

Investment opportunities in Earth observation, satellite navigation, and connectivity areas are driving market growth

- European countries are recognizing the importance of various investments in the space industry and increasing their spending in areas such as Earth observation, satellite navigation, connectivity, space research, and innovation to stay competitive in the global space industry. In November 2022, the ESA announced that it had proposed a 25% boost in space funding over the next three years designed to maintain Europe's lead in Earth observation, expand navigation services, and remain a partner in exploration with the United States. The ESA has asked its 22 nations to back a budget of EUR 18.5 billion for 2023-2025. In September 2022, the French government announced that it was planning to allocate more than USD 9 billion to space activities, an increase of about 25% over the past three years. In November 2022, Germany announced that about EUR 2.37 billion was allocated, including about EUR 669 million for Earth observation, about EUR 365 million for telecommunications, EUR 50 million for technology programs, EUR 155 million for space situational awareness and space security, and EUR 368 million for space transport and operations.
- The UK Space Agency announced that it would be funding EUR 6.5 million to support 18 projects aimed at boosting the UK space industry. The funding will stimulate growth in the UK space industry by supporting high-impact, locally-led schemes, and space cluster development managers. The 18 projects will pioneer a range of innovative space technologies to combat local issues, such as utilizing Earth observation data to enhance public services. In April 2023, the UK government announced that it is expecting to allocate USD 3.1 billion for space-related activities.

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The Europe Satellite Attitude and Orbit Control System Market is fairly consolidated, with the top five companies occupying 98.52%. The major players in this market are Bradford Engineering BV, Jena-Optronik, OHB SE, SENER Group and Sital S.p.A. (sorted alphabetically).

Additional Benefits:

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

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