

Germany Satellite Imagery Services - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

Germany satellite imagery services market is valued at 0.38 billion in the current year and is expected to attain a CAGR of 14.71% during the forecast period to become 0.75 billion by the next five years. The application of satellite imagery services in data acquisition, mapping, and monitoring of various environmental purposes, including monitoring methane emissions, planning nature-based solutions, climate risk analysis, impact assessment for projects, etc., are driving the market in Germany.

Key Highlights

- Germany is prioritizing investments in various space programs, which include the development of satellite-based projects to improve climate change mitigation strategies and supporting private-sector space activities with new business models, which would drive the market of satellite imagery services in the country.
- The Ukraine war has generated energy and climate crises in the country, and space activities significantly contribute to resolving these challenges, creating an opportunity for the market players in Germany. Additionally, in November 2022, the Federal Government Coordinator of German Aerospace Policy stated that Germany has planned to invest EUR 4 billion (Approximately USD 4.5 Billion) in the European space agency to strengthen their space activities, which would increase the demand for satellite imagery services due to their application in intelligence, surveillance & Security, etc.
- The demand for satellite data analytics in end-user applications in the country, including construction and transportation, is creating a need for satellite imagery services because geospatial and mapping data and satellite imagery services are required in sourcing raw information. For instance, in August 2022, LiveEO, a satellite technology company in Germany, raised USD 19.5 million to expand its offerings, including the infrastructure monitoring suite powered by satellite imagery, which takes the earth observation data produced by satellites and applies artificial intelligence (AI) to it to analyze, showing the growth potential for the demand for satellite imagery services in the country.
- The satellite imagery services are expensive, and data acquisition & processing can be a constraint for some users due to its high

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cost, which could restrict the market adoption in the country. Additionally, satellite imagery may not detect small-scale environmental changes due to its lesser resolution than other imagery techniques.

-The country's adoption of satellite imagery services increased during and after the covid-19 pandemic due to its applications in managing and tracking the spread of infections in the country. For instance, in March 2020, European Space Imaging collected satellite imagery of Germany's COVID-19 testing facilities in Munich, Germany. However, the supply chain disruption resulting in the delay in launching new satellites during the pandemic has impacted Germany's satellite imagery services market.

Germany Satellite Imagery Services Market Trends

The country's Investments in Space Technology and Defense Drives the Market

- The German Space Center at DLR, Germany's space agency, has implemented the country's Federal Government's space strategy and partnered with global satellite imagery service providers to use their satellite imagery data for developing disaster management solutions, creating an opportunity for the market in the country.

- For instance, in July 2023, European Space Imaging, a very high-Resolution satellite imagery provider, announced a multi-million-euro investment into its ground station at the German Aerospace Center near Munich. This strategic upgrade extends the ability for EUSI to deliver imagery with high speed and efficiency, solidifying its position as a hub for the best satellite imagery technology in Germany.

- The country is a part of the European Union and has been availed of funding from EU councils to develop its space programs, which creates an opportunity for market growth in the country. For instance, in May 2023, The European Investment Fund, supported by the European Recovery Programme (ERP) of the German government, announced the investment of EUR 60 million in equity to Alpine Space Ventures (ASV), a Germany-based venture capital fund.

- In addition, the capital investment would be used in the country's NewSpace sector, which includes the private space industry in areas from private launch to high-speed internet constellations, earth observation satellites, etc., which would fuel the availability of earth imagery data in the country and would support the growth of earth imagery-based services in Germany.

- The country has set an objective to reach a NATO target of spending 2% of the gross domestic product on defense in 2024, which would increase the satellite imagery service-based military applications for security, surveillance, Intelligence, etc., in the country, and would support the market growth in Germany during the forecast period. For instance, in July 2023, the government of Germany planned to increase its defense spending by EUR 1.7 billion (USD 1.9 billion) to EUR 51.8 billion (USD 58 billion) in the 2024 budget.

The Application in Natural Resource Management Contributes a Major Portion of The Market Share

- Germany has prioritized natural resource management for a sustainable future, creating a market opportunity for satellite imagery in the country because satellite images can provide spatial resolutions of up to 30 centimeters for better analysis, assessment, and monitoring of natural resources.

- For instance, in November 2022, the scientific management department of the German Research Centre for Geosciences successfully launched the German environmental satellite EnMAP after it passed all tests, which would generate satellite imagery data for monitoring of arid regions, soils, agricultural areas, and ecological pollution to water and snow areas, would drive the market for satellite imagery services in the country.

- In addition, EnMAP, the Environmental Mapping and Analysis Program satellite, would acquire images of the Earth's surface in around 250 colors ("spectral bands") and would provide information on the condition of vegetation, soils, and waters with accuracy, which shows the demand of satellite imagery services in managing the natural resources in Germany during the

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forecast period.

- The Federal Cabinet adopted the National Water Strategy to protect Germany's natural water reserves in March 2023, has taken precautionary measures to prevent water scarcity, avoid conflicts of use, tackle the backlog in modernizing the water infrastructure, and improve the status of water bodies and water quality, which could create an opportunity for the satellite imagery services due to its application in enabling environmental scientist to develop and monitor development plans more effectively.
- Satellite imagery-based observations can give consistent data to make decisions, identify problems and take actions to protect the natural environment, plan for help after disasters, and detect and predict changes to save the natural resources of the country, fueling the adoption of satellite imagery services in Germany.

Germany Satellite Imagery Services Industry Overview

The Germany satellite imagery services market is moderately fragmented due to the presence of regional and global players operating in the Country, such as Planet Labs, Airbus, Telespazio Spa, L3Harris Corporation Inc, etc. The market players in the country are adopting strategies such as partnerships, mergers, investments for service innovations, and acquisitions to develop competitive advantages to increase market share.

In July 2022, Planet Labs Germany GmbH signed a contract with the German Federal Agency for Geodesy and Cartography to provide the agency with daily, high-resolution satellite data for crisis response, environmental and nature conservation, and forest and agricultural monitoring. Access to satellite imagery data would help the federal agency promote public and civil safety throughout the Federal Republic of Germany.

Additional Benefits:

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

Table of Contents:

1 INTRODUCTION

1.1 Study Assumptions and Market Definition

1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET INSIGHTS

4.1 Market Overview

4.2 Industry Attractiveness - Porter's Five Forces Analysis

4.2.1 Bargaining Power of Buyers

4.2.2 Bargaining Power of Suppliers

4.2.3 Threat of New Entrants

4.2.4 Threat of Substitutes

4.2.5 Intensity of Competitive Rivalry

4.3 Industry Value Chain Analysis

4.4 Assessment of the Impact of COVID-19 on the Market

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5 MARKET DYNAMICS

5.1 Market Drivers

5.1.1 The country's Investments in Space Technology and Defence

5.1.2 Adoption of Big Data and Imagery Analytics

5.2 Market Restraints

5.2.1 High Cost of Satellite Imaging Data Acquisition and Processing

5.2.2 High-resolution Images Offered by Other Imaging Technologies

6 MARKET SEGMENTATION

6.1 By Application

6.1.1 Geospatial Data Acquisition and Mapping

6.1.2 Natural Resource Management

6.1.3 Surveillance and Security

6.1.4 Conservation and Research

6.1.5 Disaster Management

6.1.6 Intelligence

6.2 By End-User

6.2.1 Government

6.2.2 Construction

6.2.3 Transportation and Logistics

6.2.4 Military and Defense

6.2.5 Forestry and Agriculture

6.2.6 Others

7 COMPETITIVE LANDSCAPE

7.1 Company Profiles

7.1.1 Planet Labs

7.1.2 Airbus

7.1.3 Telespazio Spa

7.1.4 L3Harris Corporation Inc.

7.1.5 ESRI Inc

7.1.6 UP42 GmbH

7.1.7 European Space Imaging GmbH

7.1.8 GAF AG

7.1.9 LiveEO

7.1.10 MapTiler

8 INVESTMENT ANALYSIS

9 MARKET OPPORTUNITIES AND FUTURE TRENDS

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