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

Market Report | 2023-10-13 | 157 pages | Mordor Intelligence

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Report description:

The North America Satellite Attitude and Orbit Control System Market size is estimated at USD 1.77 billion in 2024, and is expected to reach USD 3.40 billion by 2029, growing at a CAGR of 13.95% during the forecast period (2024-2029).

Increasing launches of LEO satellites are driving the market demand

- The satellite AOCS market is experiencing strong growth, driven by the increasing demand for LEO satellites, which are used for communication, navigation, Earth observation, military reconnaissance, and scientific missions. Between 2017 and 2022, approximately 3,021 satellites were launched into LEO. In addition, the demand for AOCS is growing because of the increasing need for high-speed internet access, particularly in rural and remote areas. This has led companies such as SpaceX, OneWeb, and Amazon to plan the launch of thousands of satellites into LEO.
- Additionally, to ensure the proper functioning of GEO satellites, AOCS must perform a range of tasks, including controlling the satellite's orientation and stabilizing its position. Manufacturers like Honeywell Aerospace provide a range of AOCS products and services for GEO satellites, including the Momentum and Attitude Control System (MACS) and the Digital Star Tracker (DST). Between 2017 and 2022, approximately 33 satellites were launched into GEO.
- In recent years, the military's use of MEO satellites has grown due to their different advantages, including increased signal strength, improved communications and data transfer capabilities, and greater coverage area. For instance, Raytheon Technologies' Intelligence & Space and Boeing's Millennium Space Systems are developing the first prototype Missile Track Custody (MTC) MEO OPIR payloads to detect and track hypersonic missiles for the US Space Force's SSC that are expected to use various AOCS systems to maintain their orbit. Between 2017 and 2022, approximately seven satellites were launched into MEO. The overall market is expected to grow by 14.77% during 2023-2029.

North America Satellite Attitude and Orbit Control System Market Trends

Small satellites are poised to create demand in the market

- The classification of spacecraft by mass is one of the main metrics for determining the launch vehicle size and cost of launching satellites into orbit. The success of a satellite mission depends on the accuracy of measuring its mass prior to the flight and the proper balance of the satellite to yield the mass within limits.
- Satellites are classified according to mass. The major classification type is large satellites that are more than 1,000 kg. During 2017-2022, around 45+ large satellites launched were owned by North American organizations. A medium-sized satellite is a satellite with a mass between 500 and 1000 kg. More than 80 satellites launched were operated by North American organizations. Similarly, satellites with a mass of less than 500 kg are considered small satellites, and around 2900+ small satellites were launched in this region.
- There is a growing trend toward small satellites in the region because of their shorter development time 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 flexible and can therefore be more responsive to new technological opportunities or needs. The small satellite industry in the United States is supported by the presence of a robust framework for the design and manufacture of small satellites tailored to serve specific application profiles. The number of satellites operating in North America is expected to surge during 2023-2029 because of the growing demand in the commercial and military space segment.

Investment opportunities in the market

- In North America, government expenditure for space programs hit a record of approximately 24 billion in 2022. The region is the epicenter of space innovation and research, with the presence of the world's biggest space agency, NASA. In 2022, the US government spent nearly USD 62 billion on its space programs, making it the highest spender on space in the world. In terms of research and investment grant, the region's governments and the private sector have dedicated funds for research and innovation in the space sector. Agencies spend available budgetary resources by making financial promises called obligations. For instance, till February 2023, the National Aeronautics and Space Administration (NASA) distributed USD 333 million as research grants.
- In October 2020, the Space Development Agency (SDA) awarded a USD 149 million contract to SpaceX for the design, manufacture, and launch of a new military satellite capable of tracking and providing early warnings of hypersonic missile launches. A similar contract worth USD 193 million was awarded to L3Harris during the same timeframe. A total of eight satellites are scheduled to be manufactured by both companies and are meant to be the first crucial part of the SDA's Tracking Layer Tranche 0, which is designed to provide missile tracking for the Defense Department from space using infrared sensors. Apart from the United States, the Canadian space sector adds USD 2.3 billion to the Canadian GDP and employs 10,000 people, according to the Canadian government. The government reports that 90% of Canadian space firms are small and medium-sized businesses. The Canadian Space Agency (CSA) budget is modest, and the estimated budgetary spending for 2022-2023 is USD 329 million.

North America Satellite Attitude and Orbit Control System Industry Overview

The North America Satellite Attitude and Orbit Control System Market is fairly consolidated, with the top five companies occupying 82.65%. The major players in this market are Jena-Optronik, OHB SE, 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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