

Asia-Pacific Satellite Bus - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 169 pages | Mordor Intelligence

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Report description:

The Asia-Pacific Satellite Bus Market size is estimated at 5.82 billion USD in 2025, and is expected to reach 12.8 billion USD by 2030, growing at a CAGR of 17.07% during the forecast period (2025-2030).

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

- The Asia-Pacific region has seen a significant increase in the demand for satellite buses to accommodate a wide range of satellite orbits. This demand has been driven by the growing need for satellite-based communication, navigation, and remote sensing services. Earth observation satellites have become increasingly popular for a wide range of applications. The demand for LEO satellites has been particularly strong in China, where companies such as Spacety and Chang Guang Satellite Technology Co. Ltd. offer satellite buses for LEO missions. China has been active in this region with the launch of the Gaofen series satellites. Between 2017 and 2022, approximately 379 satellites were launched into LEO.
- GEO satellites are particularly important for communication and broadcasting services, such as television and the Internet. The demand for GEO satellites has been particularly strong in India, where companies such as ISRO and Antrix Corporation Ltd have been developing advanced satellite buses for communication missions. China has also been investing heavily in GEO satellites, with the launch of the Zhongxing series of communication satellites. Between 2017 and 2022, approximately 66 satellites were launched into GEO.
- MEO satellites, such as GPS and Galileo, have become increasingly important for global navigation and positioning services. Japan has been a leader in Asia-Pacific, with the launch of the Michibiki series of MEO navigation satellites. China has also been investing in MEO satellites with the launch of the Beidou navigation system. Between 2017 and 2022, approximately 24 satellites were launched into MEO. The overall market is expected to grow by 20.72% during 2023-2029.

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Asia-Pacific Satellite Bus Market Trends

The trend of using better fuel and operational efficiency has been witnessed in the region

- Increased demand for satellites from the civil/government, commercial, and military segments has been witnessed in recent years. Countries like China, India, and Japan have adequate capabilities in the area of satellite bus manufacturing. However, along with the growing shift toward manufacturing smaller satellites, the manufacturing base of satellite buses is expected to expand to various countries across the world. 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.
- In 2019, Thales Alenia Space was selected by Indonesia to design and assemble a powerful telecommunication satellite for the Indonesian consortium PSN. The launch was scheduled for the end of 2022. The satellite will be based on the full electric platform Spacebus Neo. A heavier satellite requires a larger rocket and more fuel to launch it into space, thus increasing the cost of the launch and limiting 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 Asia-Pacific organizations. A medium-sized satellite has a mass between 500 and 1000 kg. More than 65+ satellites launched were operated by Asia-Pacific organizations. Similarly, satellites weighing less than 500 kg are considered small satellites, and around 200+ small satellites were launched in the region.

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

- The development of constellations or networks of small satellites working together to provide a collective service is an emerging trend. These constellations often consist of dozens or even hundreds of small satellites that communicate with each other to achieve mission goals. Distributed satellite networks provide improved coverage, redundancy, and flexibility compared to traditional large satellites. The growing utilization of commercial satellite platforms for dual (military and civil) purposes has boosted the market. Satellite communications are envisioned to be an essential part of the 5G infrastructure. The satellite transport conduit is being integrated into the overall communication map to provide seamless connectivity. This will result in new opportunities for extending satellite services in urban and rural areas.
- Considering the increase in space-related activities in Asia-Pacific, satellite manufacturers are enhancing their satellite production capabilities to tap into the rapidly emerging market potentials. The prominent countries in Asia-Pacific that pose a robust space infrastructure are China, India, Japan, and South Korea. China National Space Administration (CNSA) announced space exploration priorities for the 2021-2025 period, 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 for the development of a 13,000-satellite constellation for satellite internet.

Asia-Pacific Satellite Bus Industry Overview

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The Asia-Pacific Satellite Bus Market is fairly consolidated, with the top five companies occupying 71%. The major players in this market are Airbus SE, Honeywell International Inc., Lockheed Martin Corporation, Northrop Grumman Corporation and Thales (sorted alphabetically).

Additional Benefits:

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

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