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

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Report description:

The Military Satellite Market size is estimated at 36 billion USD in 2025, and is expected to reach 57.99 billion USD by 2030, growing at a CAGR of 10.00% during the forecast period (2025-2030).

Faster relay of communication is driving the LEO segment to occupy a major share of 84.8% in 2023

- A satellite or a spacecraft is usually placed into one of many special orbits around the Earth, or it can be launched into an interplanetary journey based on its intended application. Out of the three orbits, namely low Earth orbit (LEO), geostationary orbit (GEO), and medium Earth orbit (MEO), the LEO orbit is the most widely preferred one because of its proximity to the Earth.
- Many weather and communication satellites tend to have high Earth orbits, which are farthest from the surface. Satellites in mean (medium) Earth orbit include navigational and specialized satellites designed to monitor a specific area. Each distance has benefits and challenges, including increased coverage and decreased energy efficiency. Most science satellites, including NASA's Earth Observation System team, are in low Earth orbit.
- During 2017-2022, out of the 57 satellites launched in the MEO orbit, most were built for navigation/global positioning purposes. Similarly, out of the 147 satellites in the GEO orbit, most were deployed for communication and Earth observation purposes. Around 4,131 LEO satellites manufactured and launched were owned by North American organizations in that period.
- The increasing use of satellites in areas such as electronics intelligence, Earth science/meteorology, laser imaging, and optical imaging is expected to drive the demand for the development of satellites during the forecast period.

The surge in the number of defense satellites globally is expected to aid the military satellites market

- The global defense expenditure crossed over USD 2 trillion in 2022, with the major military power, the United States, surging its defense expenditure by USD 773 billion. The increasing importance of the US Space Force is due to it taking over the operation of all military satellite communications satellites. The US armed forces are integrating space systems with air, land, and sea platforms as military forces increasingly rely on satellites for operations.
- The United States was followed by China, India, Russia, and the United Kingdom, which also increased their defense expenditures by 14%, 5%, 6.8%, and 13%, respectively. The major defense players have well-established budgets for their defense satellite domain. For instance, in March 2022, France's Armed Forces Ministry planned to spend USD 706 million in the space domain and earmarked EUR 5.3 billion on military space capabilities and services during 2019-2025.
- The market is witnessing the entry of private players spending huge amounts on R&D to exploit new opportunities in the industry. Companies in North America have emphasized developing new satellite buses in the military satellite market. For instance, in January 2023, Lockheed Martin's first multi-mission spacecraft, the LM 400, is a flexible mid-sized satellite adaptable for military users, readied from the company's Digital Factory production line and scheduled for launch in 2023. During 2017-2022, around 230+ satellites manufactured and launched were owned by military and government organizations in North America. High military budget spending and technology development are expected to drive the North American market at a healthy growth rate, amounting to 91%, during 2023-2029.

Global Military Satellite Market Trends

Rising demand for satellite miniaturization globally is driving market growth

- The ability of small satellites to perform nearly all the functions of traditional satellites at a fraction of their cost has increased the viability of building, launching, and operating small satellite constellations. The demand from North America is primarily driven by the United States, which manufactures the largest number of small satellites each year. In North America, during 2017-2022, a total of 596 nanosatellites were placed into orbit by various regional players. NASA is also currently involved in several projects aimed at developing these satellites.
- The market demand in Europe is primarily driven by Germany, France, Russia, and the United Kingdom, which manufacture the largest number of small satellites each year. During 2017-2022, more than 50 nano and microsatellites were placed into orbit by various regional players. The miniaturization and commercialization of electronic components and systems have driven market participation, resulting in the emergence of new market players who aim to capitalize on and enhance the current market scenario. For instance, UK-based startup Open Cosmos partnered with ESA to provide commercial nanosatellite launch services to end users while ensuring competitive cost savings of around 90%.
- The demand from Asia-Pacific is primarily driven by China, Japan, and India, which manufacture the largest number of small satellites annually. During 2017-2022, more than 190 nano and microsatellites were placed into orbit by various regional players. China is investing significant resources toward augmenting its space-based capabilities. The country has launched the most significant number of nano and microsatellites in Asia-Pacific to date.

The surge in investment opportunities is expected to boost the global satellite manufacturing market

- In North America, global government expenditure for space programs reached a record of approximately USD 103 billion in 2021. 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 programs in the world. In the United States, federal agencies receive aid from Congress every year,?known as funding, NASA received USD 32.33 billion in 2023 for its subsidiaries.
- European countries are recognizing the importance of various investments in the space domain and are increasing their spending on innovative activities to remain competitive in the global space industry. In November 2022, 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 space exploration with the United States. The European Space Agency (ESA) is asking its 22 nations to back a budget of some EUR 18.5 billion for 2023-2025. Germany, France, and Italy are the major contributors.
- In line with the increase in space-related activities in the Asia-Pacific region, in 2022, Japan's draft budget registered a rise in its space budget, which amounted to over USD 1.4 billion. It included the development of the H3 rocket, Engineering Test Satellite-9, and the nation's Information Gathering Satellite (IGS) program. Similarly, the proposed budget for India's space programs for FY22 was USD 1.83 billion. In 2022, the South Korean Ministry of Science and ICT announced a space budget of USD 619 million for manufacturing satellites, rockets, and other key space equipment.

Military Satellite Industry Overview

The Military Satellite Market is fairly consolidated, with the top five companies occupying 85.32%. The major players in this market are China Aerospace Science and Technology Corporation (CASC), Lockheed Martin Corporation, Raytheon Technologies Corporation, ROSCOSMOS and Thales (sorted alphabetically).

Additional Benefits:

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

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