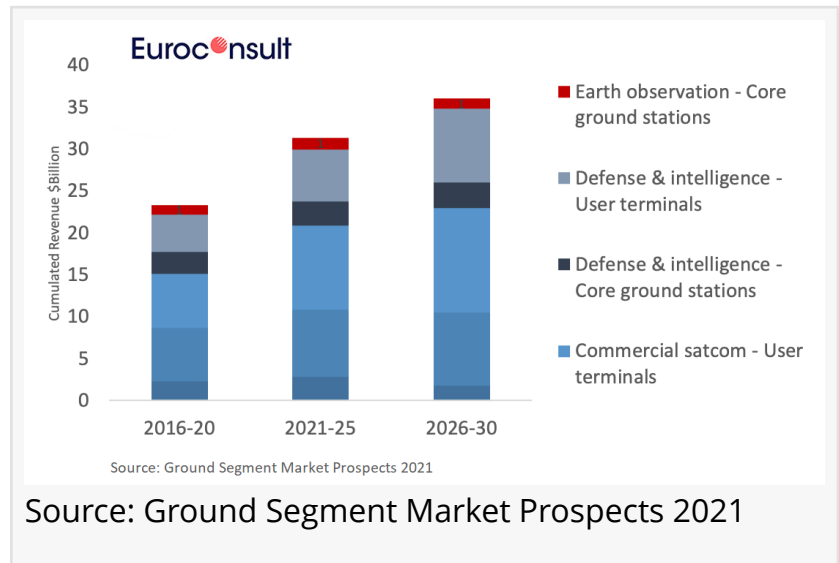


Space Sector Ground Segment Report forecasts \$67 Billion cumulated market value from 2021 to 2030

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-- The downstream space market has witnessed a significant increase in the number of ground stations for the commercial satcom and Earth Observation markets, with overall revenues forecast to reach \$7.5 Billion by 2030, driven by the rapidly expanding demand for data services and user terminals. Whilst the broadcast element has declined, this is being offset by the growth in the data services segment. A report by global strategists Euroconsult has captured these revealing trends, whilst uniquely incorporating defense market opportunities in this area, along with the impact of COVID, making it essential reading for anyone with an interest in assessing the ground segment market.



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*Pacôme Revillon, Euroconsult
CEO*

In response to the rapid growth and growing interest in the ground segment market, leading international consulting and market intelligence firm Euroconsult have released a new report analyzing revenue opportunities looking specifically at the Satcom, Earth Observation and Defense sectors.

Euroconsult's [Ground Segment Analysis 2021](#) report provides a strategic overview of all ground-based elements for key downstream services, assesses global ground station trends and user terminals for Earth Observation and Satcom applications, examines key players and

provides commentary, analysis and forecasts for the main opportunities and threats in this area.

With several key demand drivers for the growth in ground segment activities, the report offers important insights for those looking to either take advantage of this developing market sector with their own ground segment capabilities or looking at 'Ground Segment as a Service' options.

The accelerating demand for consumer broadband and mobile has resulted in the user terminal market providing major growth opportunities, with value predicted to more than double to \$2.7 Billion in 2030. The Euroconsult report contrasts the rapid growth with that of traditional ground stations and explains capacity demand and the enabling effect of flat panel antennas in comparison with VSAT terminals, as well as the phased array / electronically steerable antenna sub-segment where its growth in potential value for tracking multiple satellites in the maritime and aerospace sectors is forecast.

Euroconsult's expert analysis highlights the need for more ground station facilities positioned to take advantage of the proliferating LEO satcom market, along with the historical lack of funding at mid-latitudes, resulting in a more recent large increase in ground stations at locations more diverse than previously developed.

Uniquely, for this domain, the defense market is also assessed, detailing extensive US opportunities and the lesser demand in Europe and Asia. Findings reveal peak investment in user terminals coincided with Middle Eastern conflicts, with slightly lower investment in recent years. The report highlights how this situation will change from 2023, with new investment in the billions of dollars expected. The impact of commercial services such as Starlink and OneWeb on the military market is analyzed, whilst the possibility of industry managing it as a service is also explored.

Pacôme Revillon, Euroconsult CEO stated "The ground segment ecosystem is at a turning point, driven by technology innovation and changes in demand patterns from private and government clients. We have strengthened our research and strategic analysis to capture the unique dynamics of the ground segment industry."

Analysis of the broadcast segment indicates major changes in the next decade via terrestrial competition, a temporary boost to the market as a result of frequency reallocation in the US and the growth in the data (broadband internet and IOT) sectors. With newer High Throughput Satellites (HTS), new antennas will be needed to track mega constellations, driving a huge demand in new frequency needs. The report looks at the growth in the size of ground stations to cover this, along with the renewal and retrofit markets related to existing infrastructure.

Euroconsult consultant, Alexandre Corral, said: "With a recent trend to virtualize Ground Stations to enable greater flexibility, the report explains how this is especially relevant to the areas of Earth Observation and mega-constellations, as it is expected to drive down costs with a shift of specific Ground Station functions from CAPEX to OPEX as more functionality can be moved into

the cloud e.g. Earth Observation and Internet of Things (IOT) utilizing Amazon Web Services and Microsoft, virtualizing the services in line with Ground Station as a Service trends”.

The impact of COVID is highlighted in the report, with the user terminal market being more affected due to the reduction in activity in transport and enterprise. Euroconsult estimate the 2020 market for user terminals is \$400 million lower than the 2019 market because of COVID, although this will recover as enterprise increases. For Ground Stations, Euroconsult did not see a direct impact on market revenues due to COVID, but did see delays in the equipment supply chain. In the Earth Observation market, the ground station segment actually increased.

The report highlights the large market opportunity in the ground segment, along with the continuous innovation to improve performance and cost efficiency. This improvement drives the ongoing adaptation of the ecosystem, with an acceleration in the number of M&A transactions and strategic partnerships to be signed over the next two years.

Euroconsult’s Ground Segment Analysis 2021 report is yet another example that the firm has its finger firmly on the pulse of space and related sectors, providing unparalleled insight and added value for key target audiences. The study comes with the option of enhanced databases as part of premium content, one covering extensive details on global ground station sites and the other specifically focusing on Earth Observation and Telecom satellites launched and to be launched from 2010 to 2030, with information about RF uplink and downlink frequencies, the operational lifetime, application and mission, the operator, manufacturing information, launch information, orbital inclination and more. Further forecasting and analysis in the report also covers operational and end user purchased ground stations, assessed by multiple parameters, with market use and potential end users also covered via a thorough examination of Satcom vertical markets.

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