

FROST & SULLIVAN

THE FUTURE OF SPACE

Identifying Opportunities to Accelerate Growth



We Identify Growth Opportunities

Is your business capitalizing on emerging new space trends?

Advancements in innovation, new investments across the space value chain, changing manufacturing philosophy, and inclusion of Internet of Things (IoT) architectures are key themes driving rapid transformation and exponential growth in the space sector. These themes will generate novel business models, new products and services, and unique revenue streams. By 2030, over 13,000 satellites will be launched, more than 60 new players will enter the upstream market and over 130 players will be active in the downstream market.

Further developments include:

Do you see digital transformation in the space industry impacting your business?

- New launch service market utilizing spaceport-based business models;
- Increased usage of high-throughput satellites offering flexible connectivity solutions at competitive prices;
- Vertical-landing re-usable launch vehicles for affordable space access;
- Evolution of small-satellites toward operational platforms;
- Introduction of dedicated launch services for on-demand small-satellite launches;
- Increased usage of commercial off-the-shelf components on the operational platform, enabling low-cost missions and frequent technology upgrades;
- Introduction of Serial production for satellite manufacturing;
- Use of low-earth, orbit-based large constellation of satellites for real-time imagery and global connectivity solutions;
- All-electric satellites enabling more power for the payload and increased mission life;
- SAR imagery for commercial applications using small satellite platform; and
- Industry consolidation among space corporations.

Can you leverage new business models to drive sustainable growth?

Over the past five decades, Frost & Sullivan has become world-renowned for its role in helping investors, corporate leaders and governments navigate economic changes and identify disruptive technologies, Mega Trends, new business models and companies to action, resulting in a continuous flow of growth opportunities to drive future success. Our team of the world's best and brightest analysts, economists and futurists guides organizations through the information maze by providing a 360-degree view of industry intelligence to help identify new opportunities before their competitors.

From Ideation to Realization

Frost & Sullivan’s space program works with space agencies, manufacturers, system suppliers, and service and technology providers to help find opportunities and implement strategies to support growth in a sea of change. Leveraging a global perspective, technology expertise and in-depth coverage of segments such as manufacturing, constellations, launch services (including spaceports), upstream and downstream services (communication, earth observation and navigation), paired with world-class support, we provide organizational leaders with the intelligence needed to capitalize on future growth opportunities.

Actionable Intelligence



Military



Civil Government/
Infrastructure



Natural Resource
Monitoring



Agriculture



Energy



Logistics/Location-
based Services



Maritime/Aviation/Rail



Disaster Management



Internet of Things

We Cover the Space Mega Trends

Defining the Future

- Big is getting bigger and small is getting smaller with growth at both ends delivering new capabilities and requirements.
- The entry of new commercial players has created high demand for more space systems, components, launch services, operations, and capabilities.
- New entrants are adopting innovative business models that deliver comparable and unique solutions at highly competitive prices.

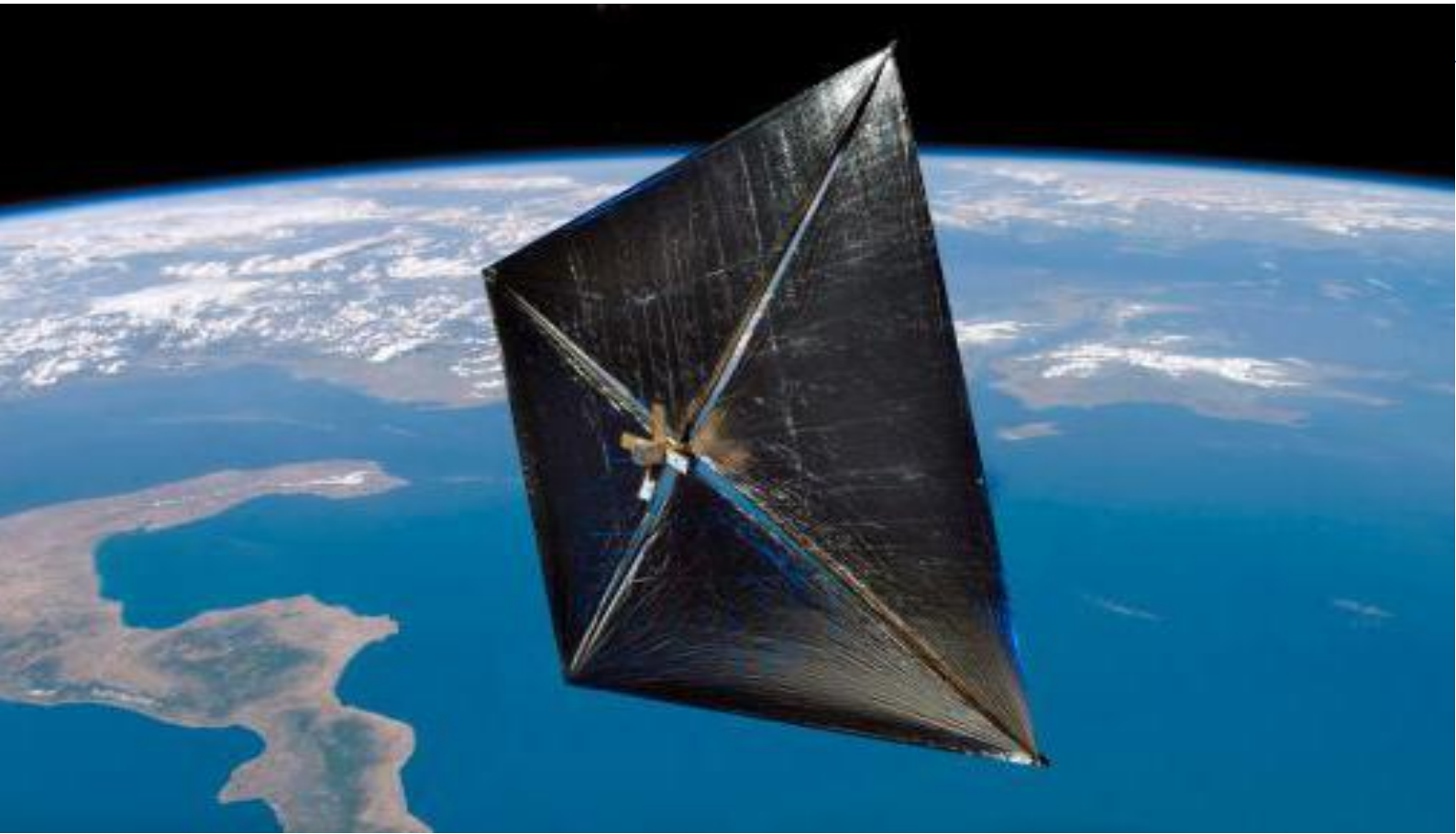
8 Space Industry Mega Trends

<p>Small-satellite Growing Launch Demand</p>	<p>Future of Space Industry Manufacturing</p>	<p>Disruption in Ground Station Services</p>	<p>Longer Mission Life using All-electric Satellites</p>
<p>Integrated IoT Architecture using Satellites</p>	<p>Low-cost Downstream Imagery Solutions</p>	<p>Affordable Global Connectivity Solutions</p>	<p>Human Transportation Legacy and the Future</p>

WANT TO ACCELERATE GROWTH? We Can Help.

Frost & Sullivan understands how to prepare companies in the face of an uncertain future. Our global team of consultants works with clients worldwide to help them navigate the many complexities facing their industries and allows them to take advantage of current growth opportunities while positioning them for even more significant growth in the future.





**Schedule a meeting with our team to
discuss your needs further.**

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