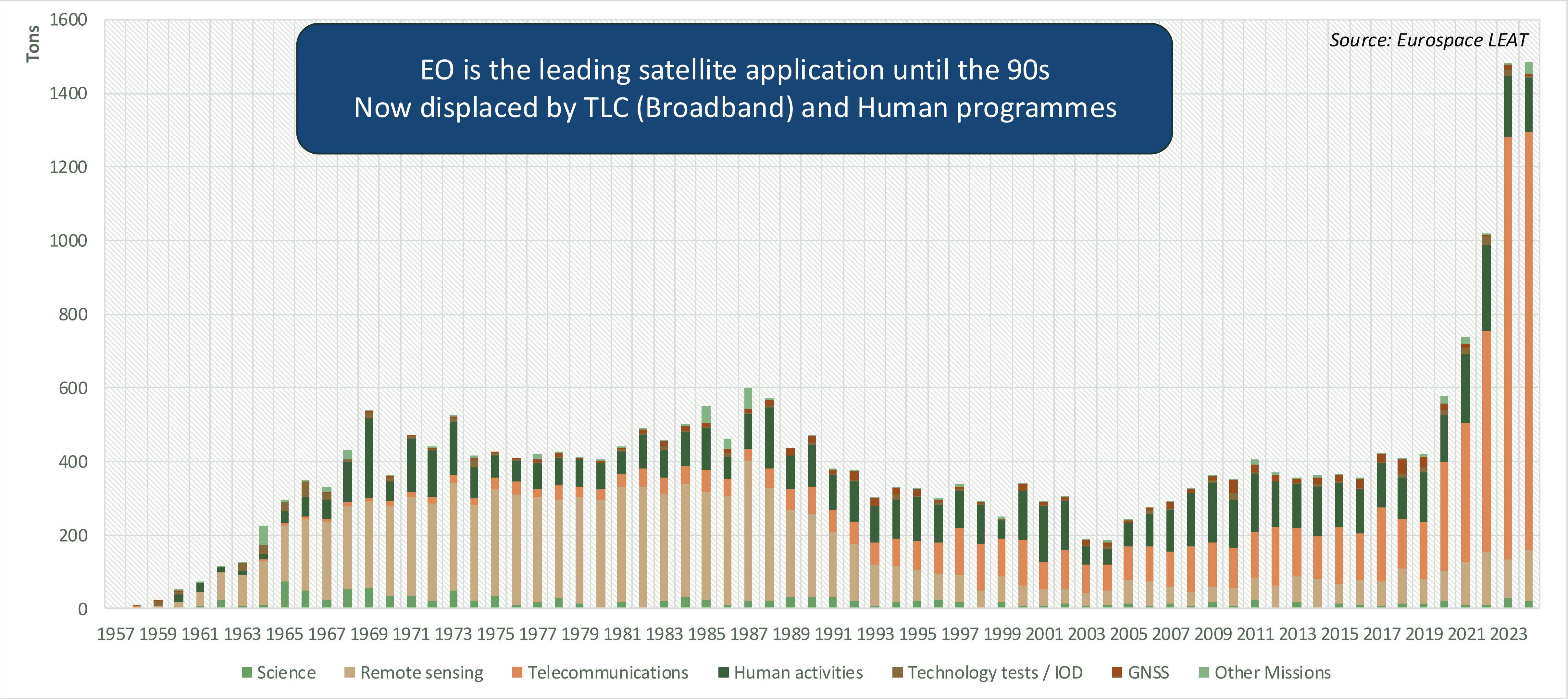
The Space group in ASD

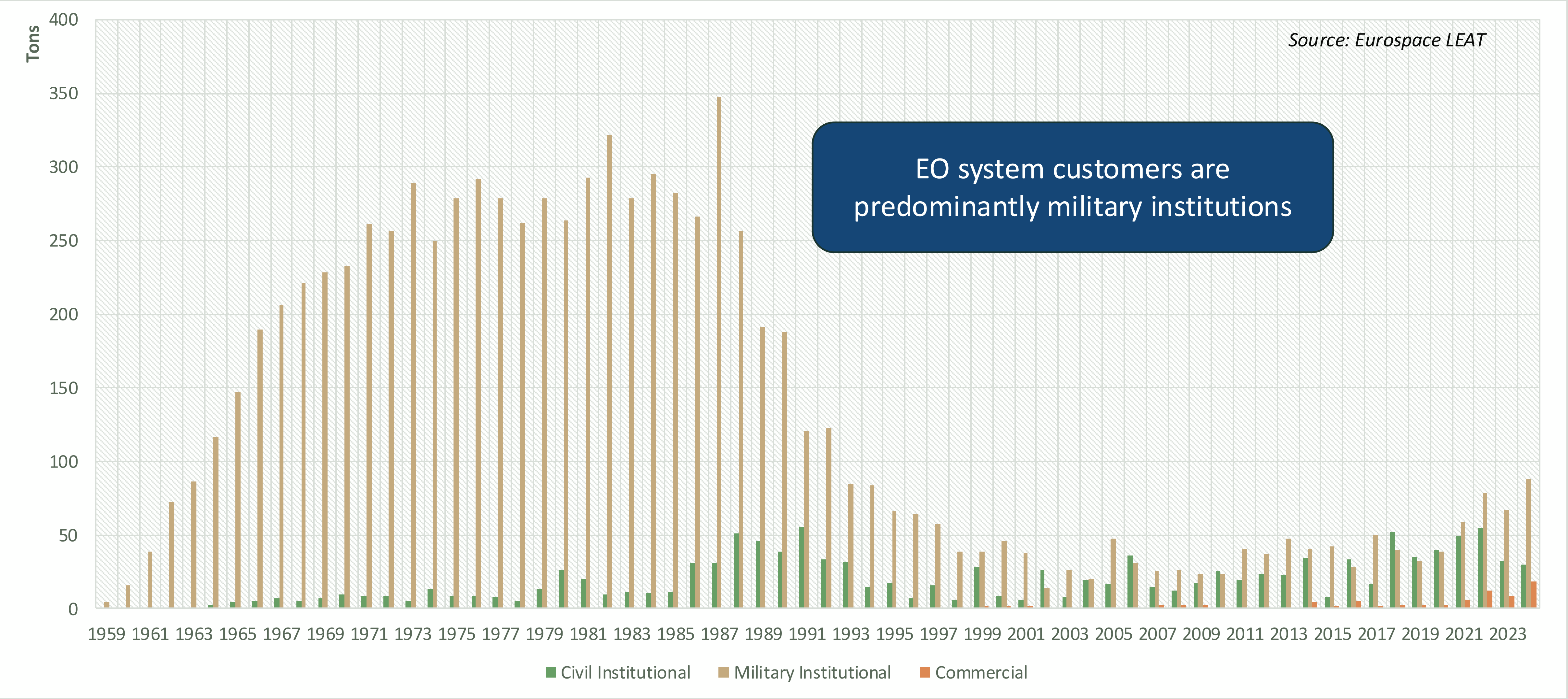
The EO space infrastructure landscape

By Pierre Lionnet – Research & Managing Director, Eurospace

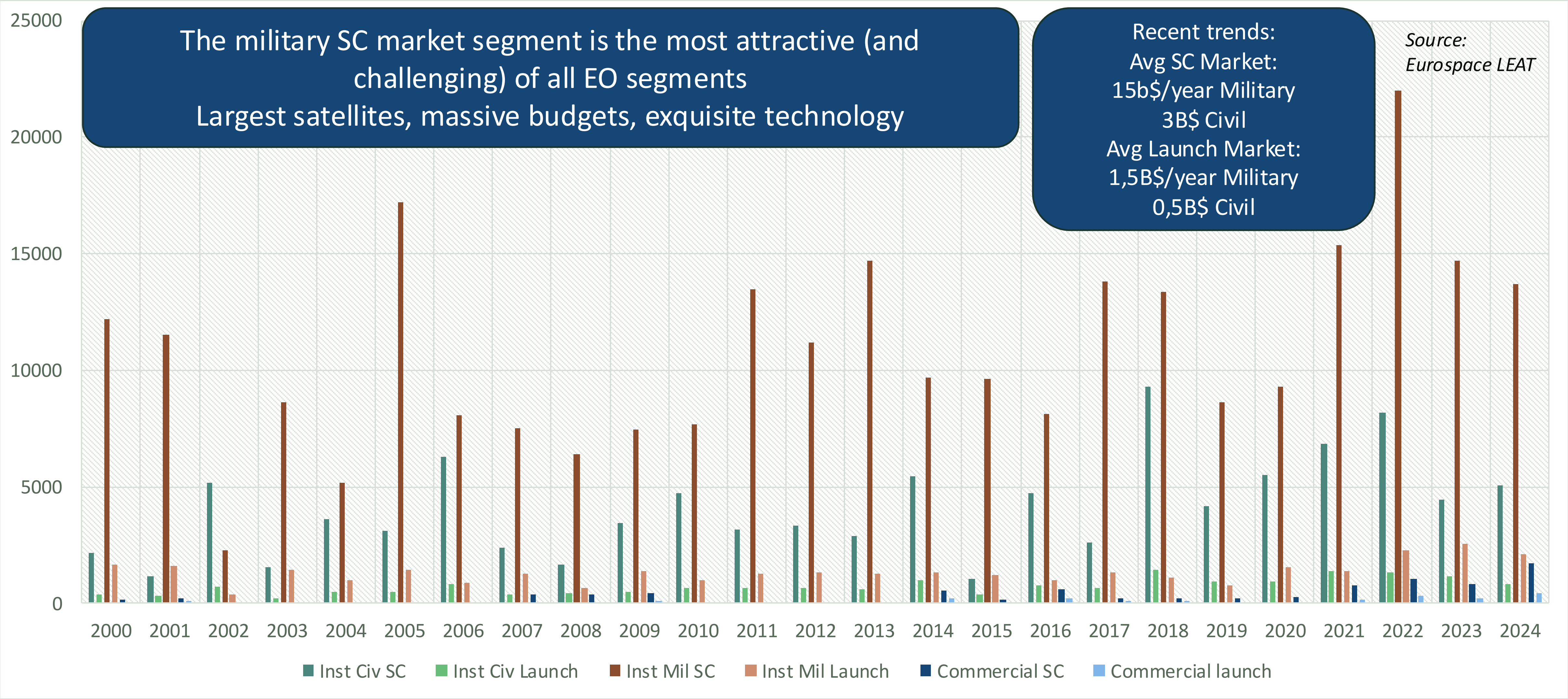
EO space infrastructure in context – mass to orbit in tons



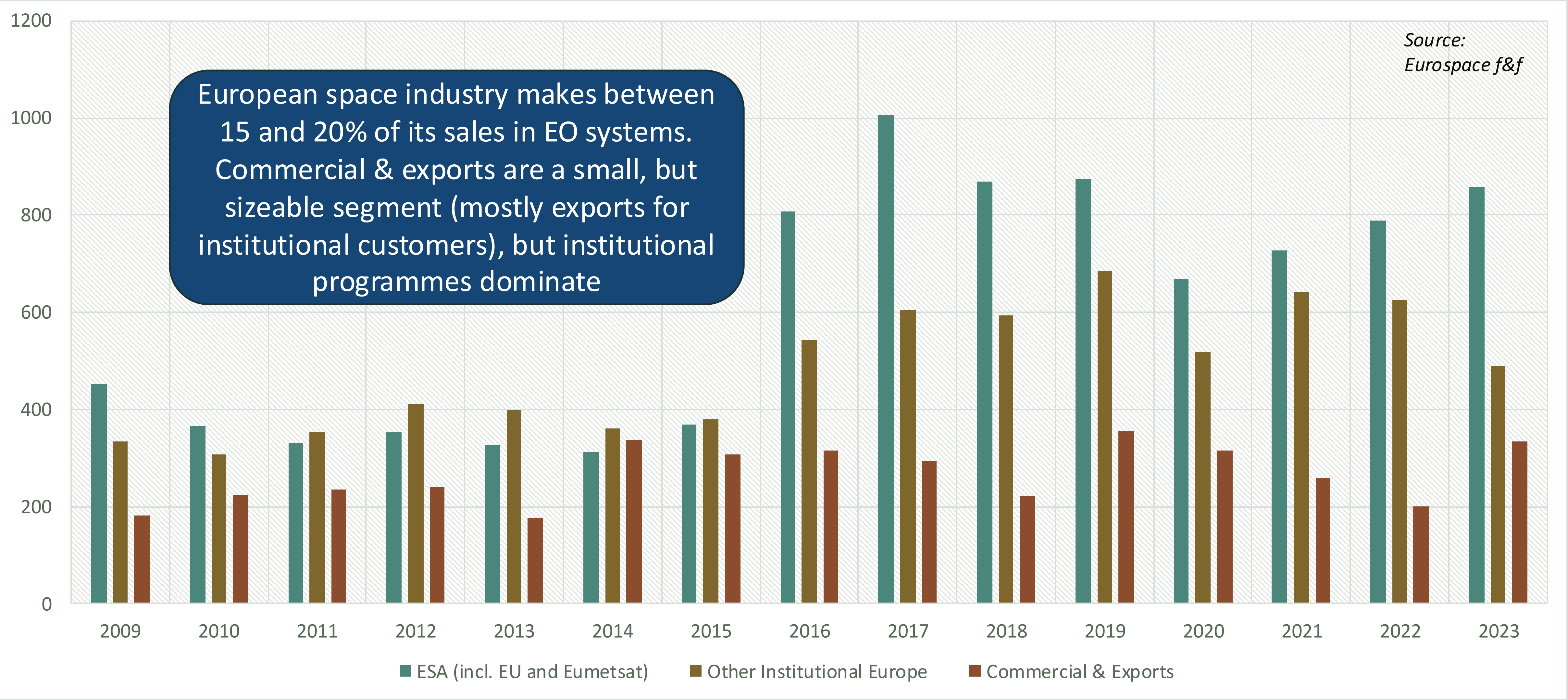
EO infrastructure customers – mass in tons



EO infrastructure and launch market (M$) by customer



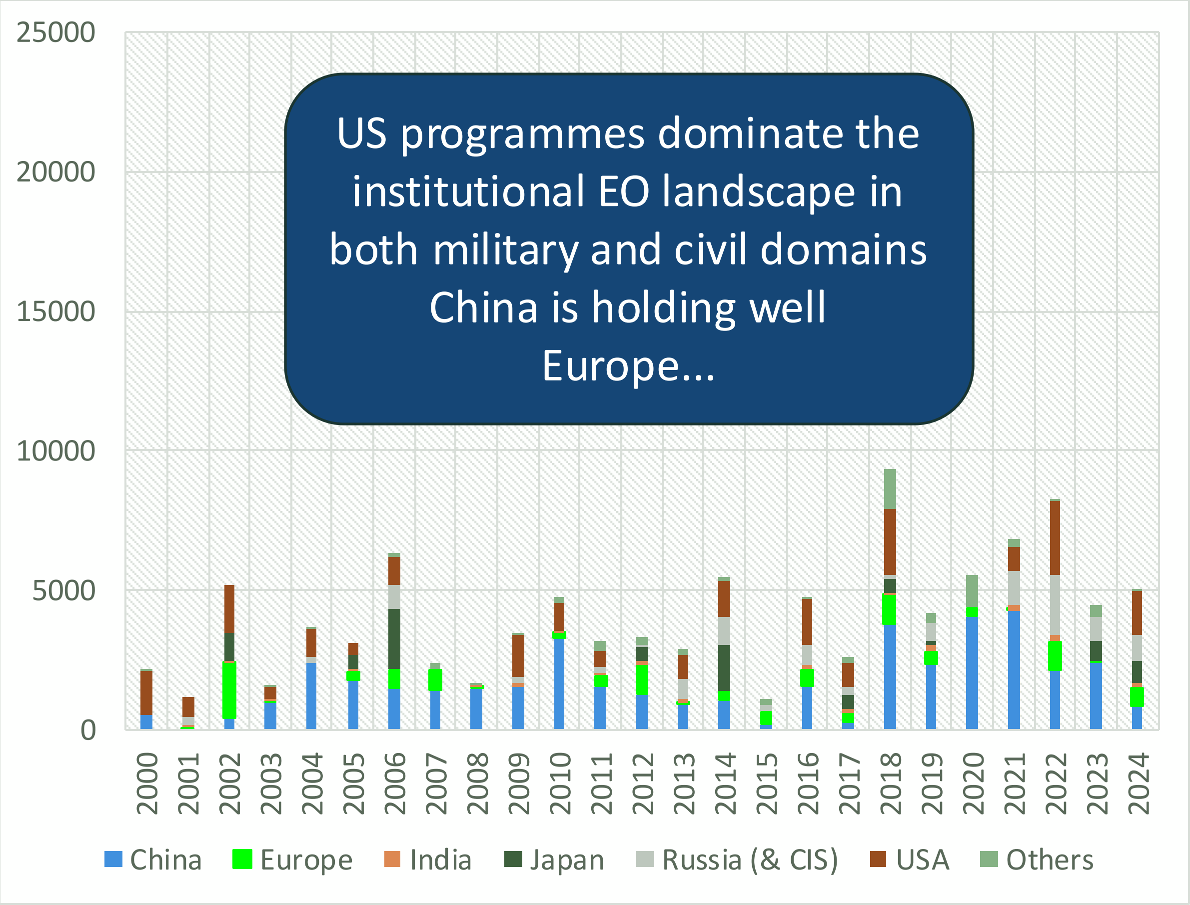
European space industry EO systems sales by main market segment
M€ current e.c.



Focus on institutional EO markets by customer region M$

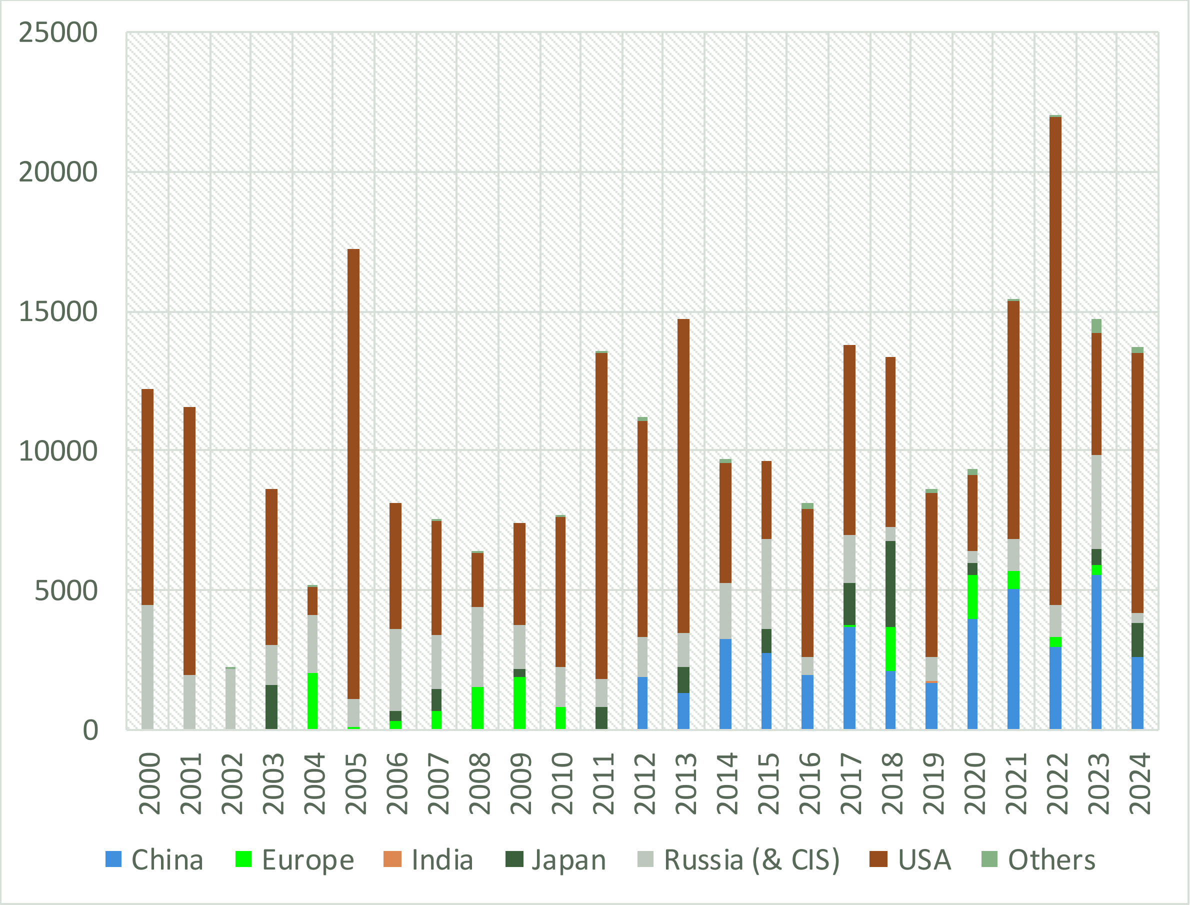
Source: Eurospace LEAT

Civil EO infrastructure (launch excl.)

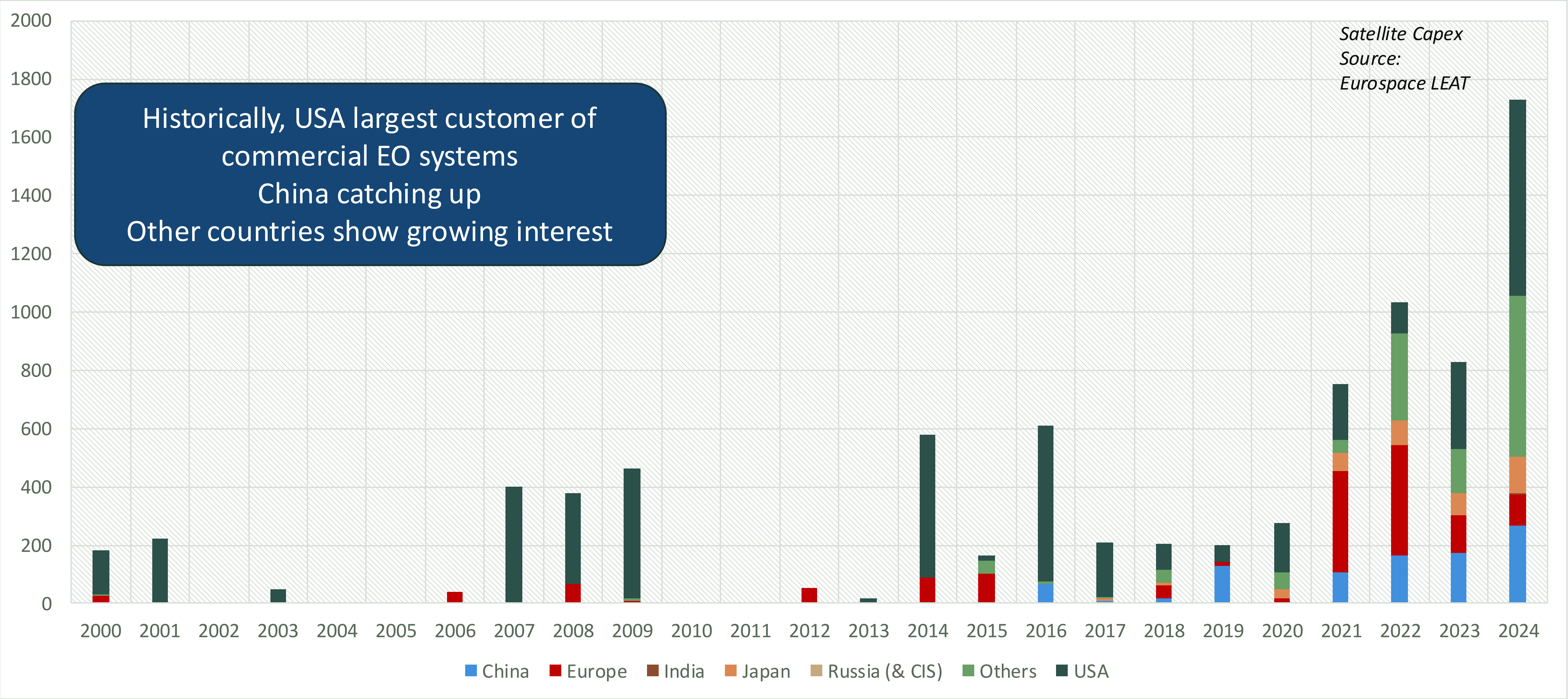


US programmes dominate the institutional EO landscape in both military and civil domains
China is holding well
Europe...

Military EO infrastructure (launch excl.)



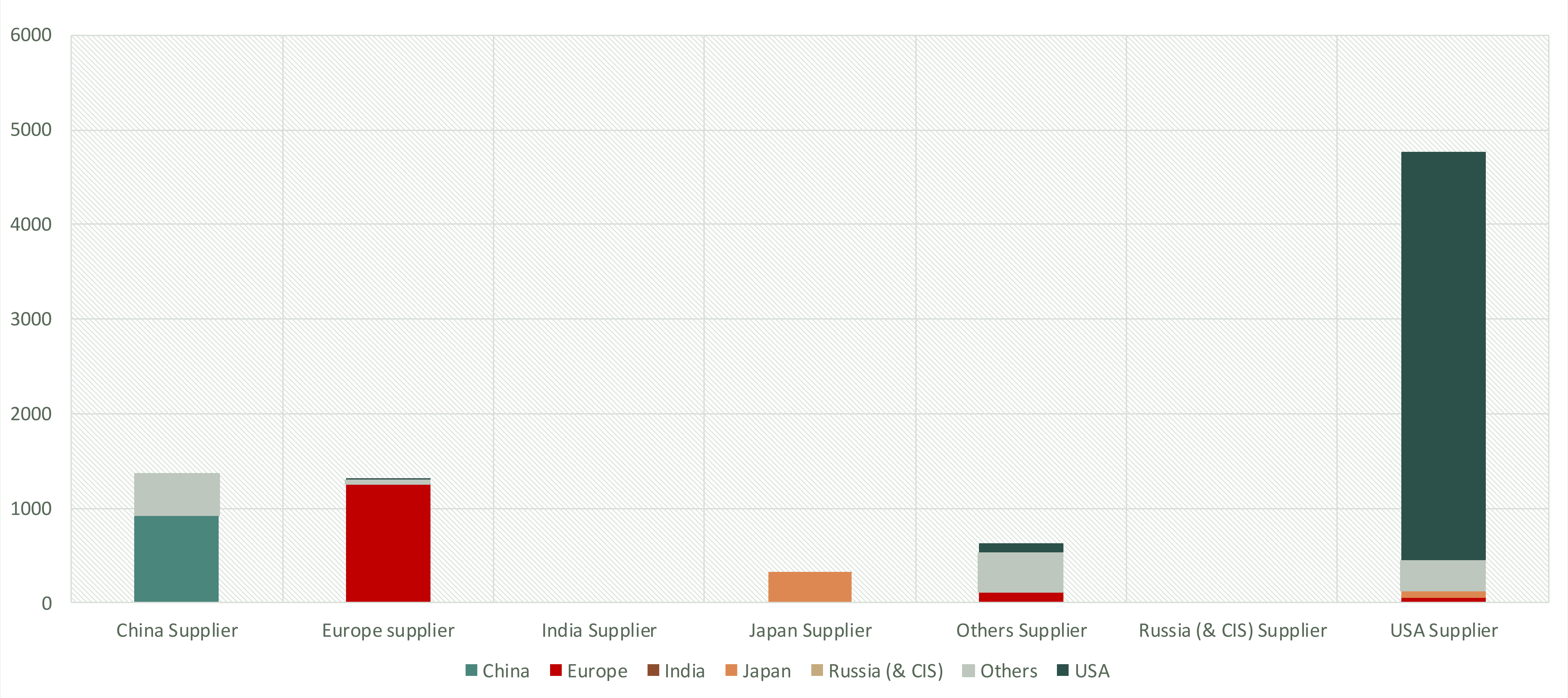
Commercial EO infrastructure M$ – customer region



Focus on commercial EO infrastructure – supplier region

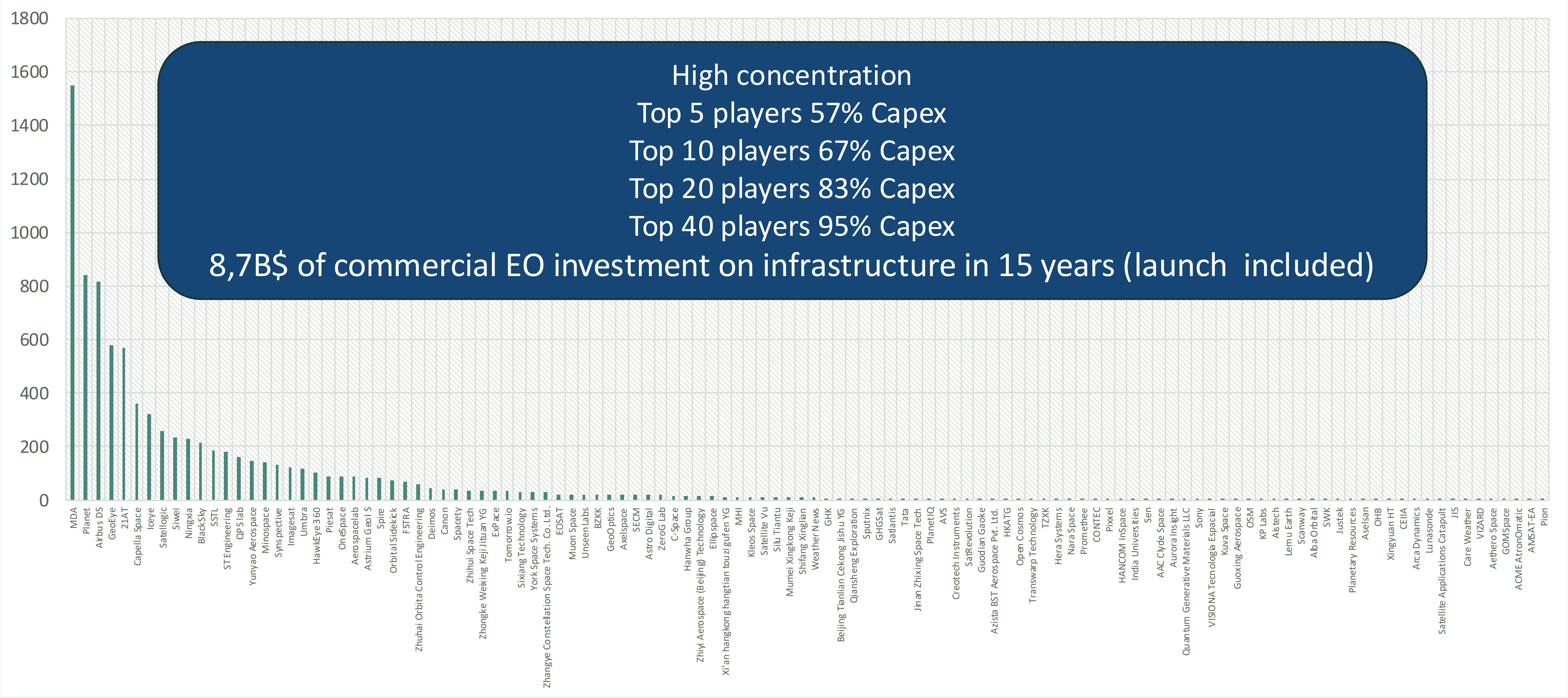
Commercial EO – regional markets

Satellite Capex estimate M$ – 2000-2024 – by customer/supplier region



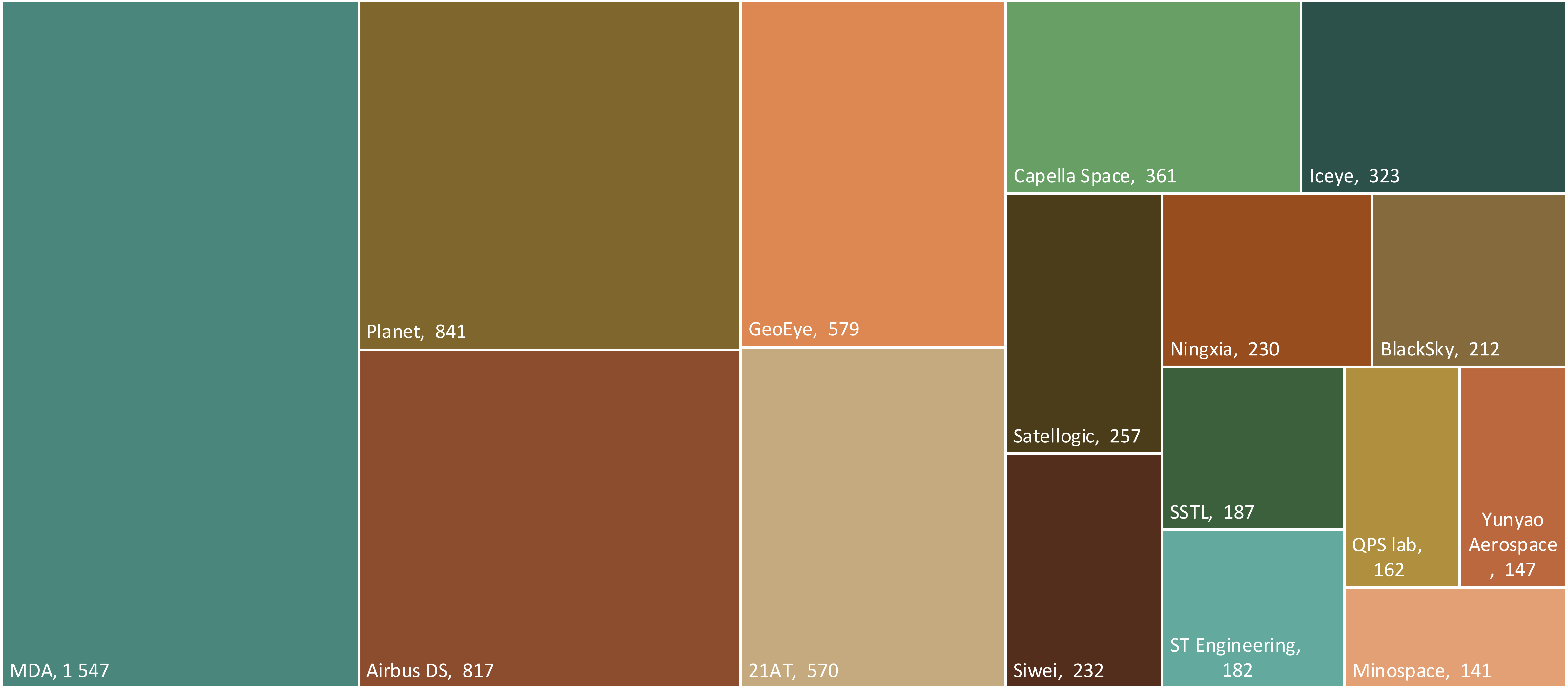
Total Capex Estimate for commercial players

M$ 2010-2024

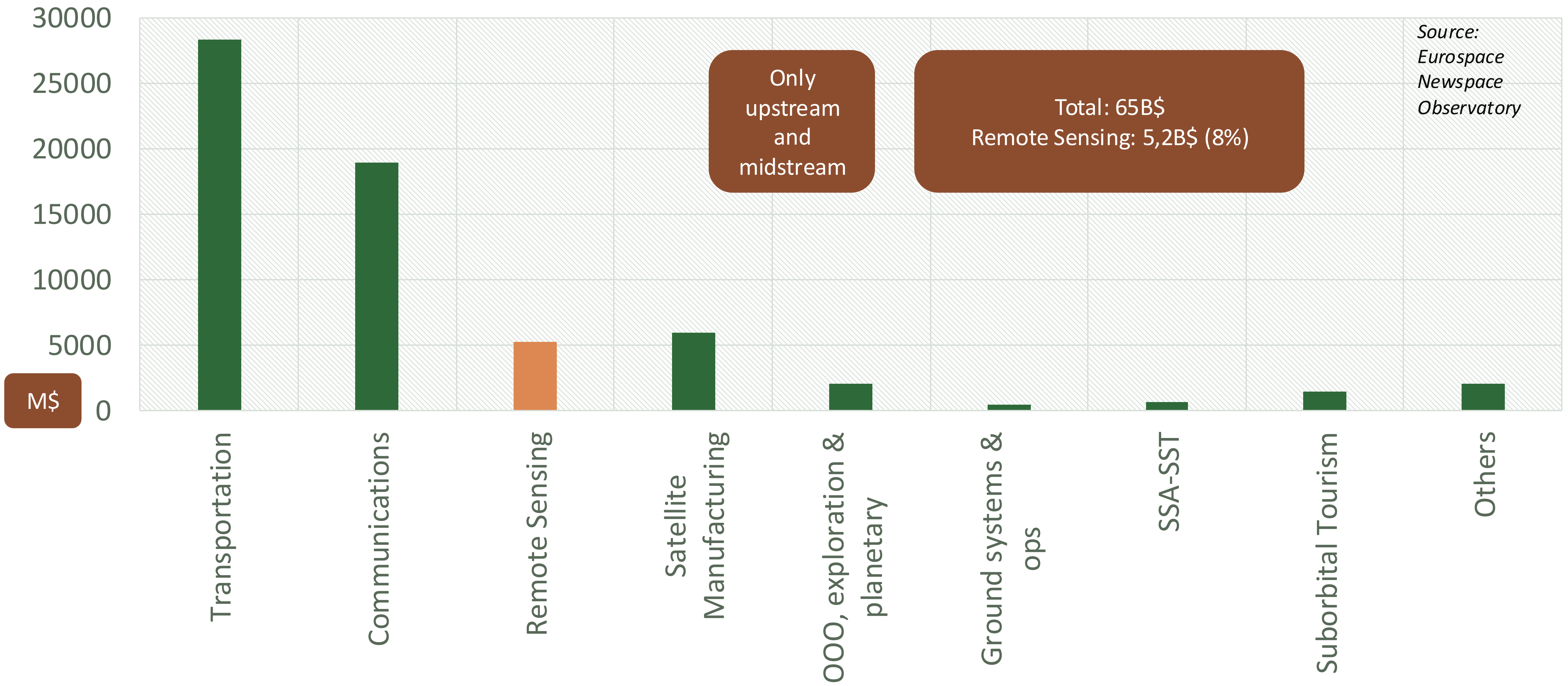


Total Capex Estimate for Top 50 commercial players

M$ 2010-2024



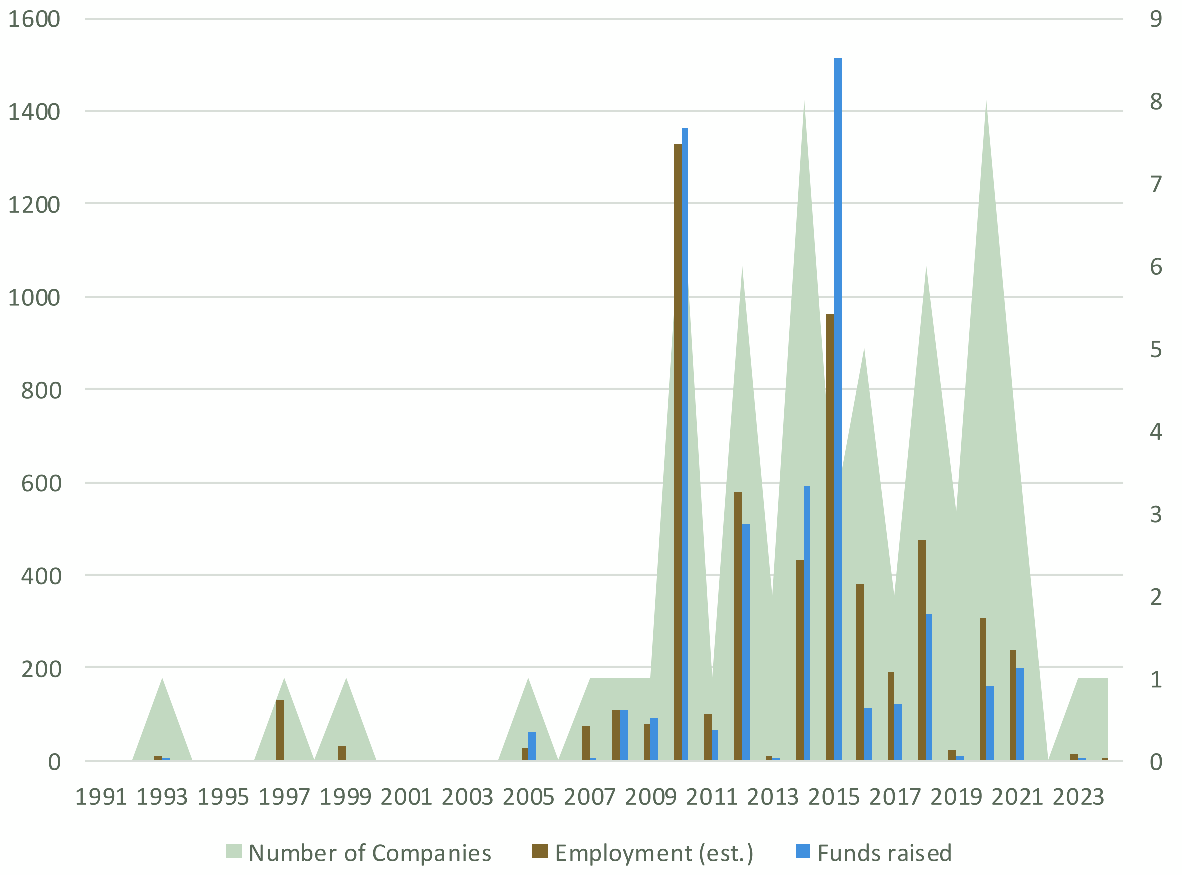
Equity raised by new space start-ups since 2000 by application



EO infrastructure start-ups in 2024

Source: Eurospace Newspace Observatory

Global: 64 Cos, 5,3B$ equity, 5500 FTE



Europe: 17 Cos, 0,6B$ equity 1700 FTE