

3rd ESA EO Commercialisation Forum | Session 1.2 | 12 May 2026 | Seville, Spain



The EO Worldwide Market

Status and Forecast of the EU

Downstream Industry

Based on the EARSC 2025 Industry Survey

Giovanni Sylos Labini Vice-Chair, EARSC | CEO, Planetek Italia

EARSC 2025 Industry Survey



811

Companies

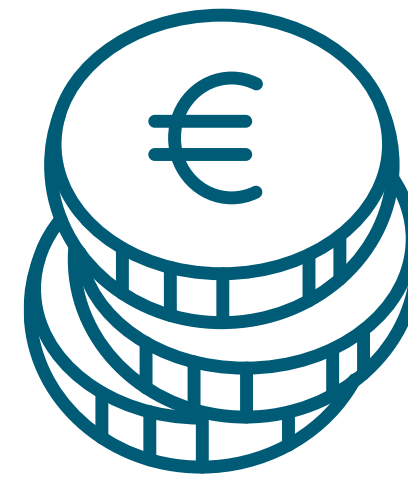
Up from 796 (+2%)
year on year



16036

Employees

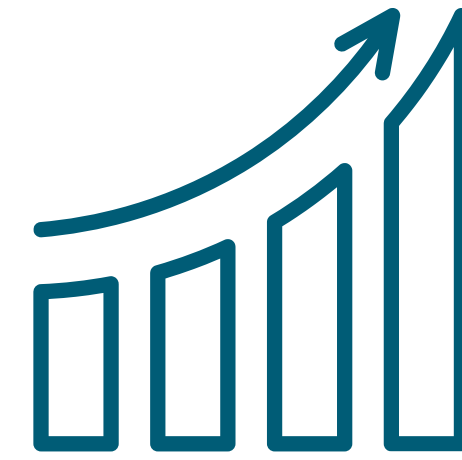
Up from 14928 (+7%)
year on year



2.66b EUR

Revenues

Up from 2,27b EUR
(+17%) year on year



9.16% Growth

Rate

Over the last five
years

INDUSTRIAL LANDSCAPE

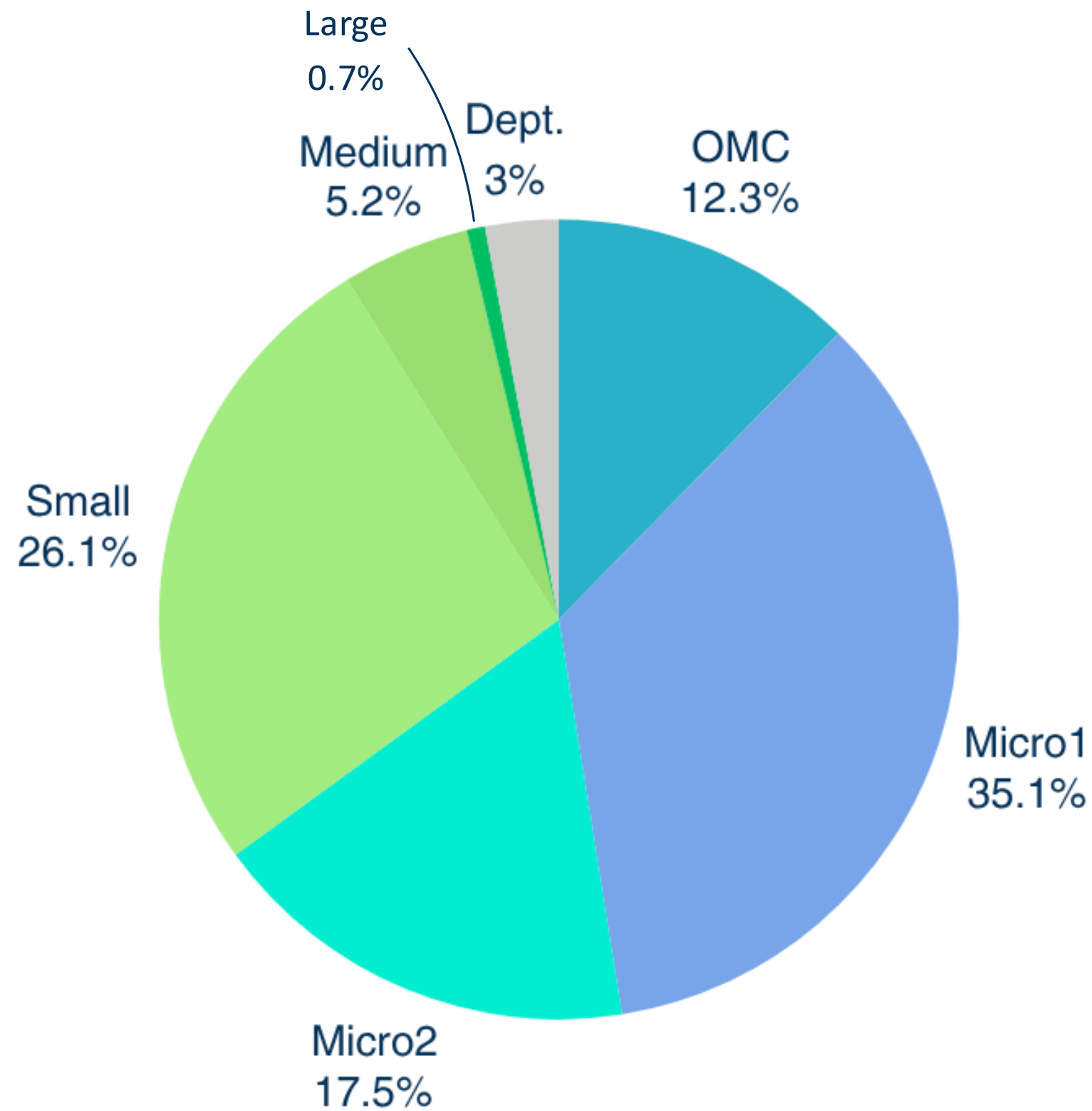
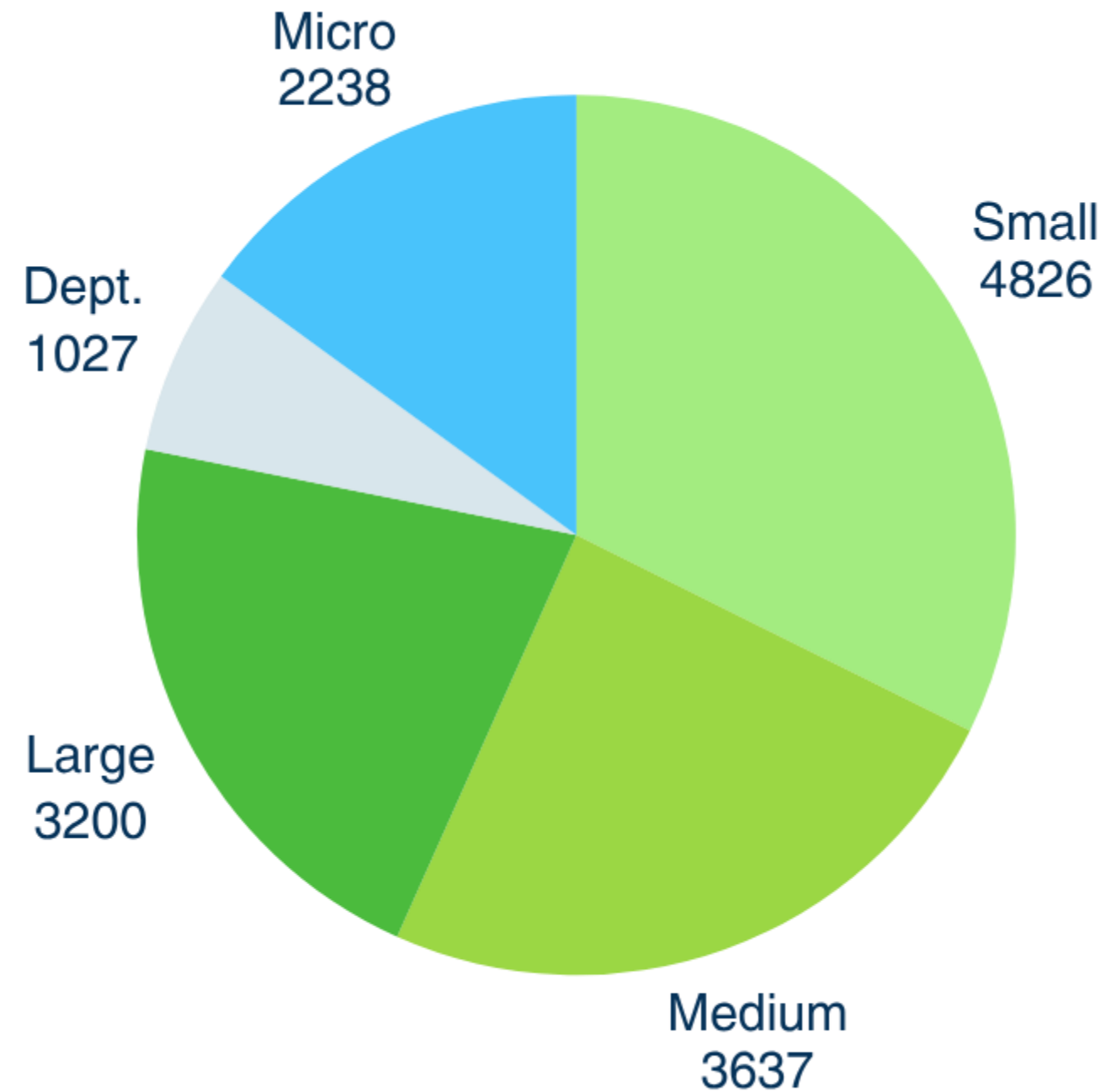


Figure 3: Breakdown of companies by company category

96% SMEs — sector composition stable across survey editions
90-93% of companies have fewer than 50 employees
 Large companies (250+ staff): only 0.7% of firms but growing

Company Class	Employees
Micro	1 - 9
Small	10 - 49
Medium	50 - 249
Large	+250

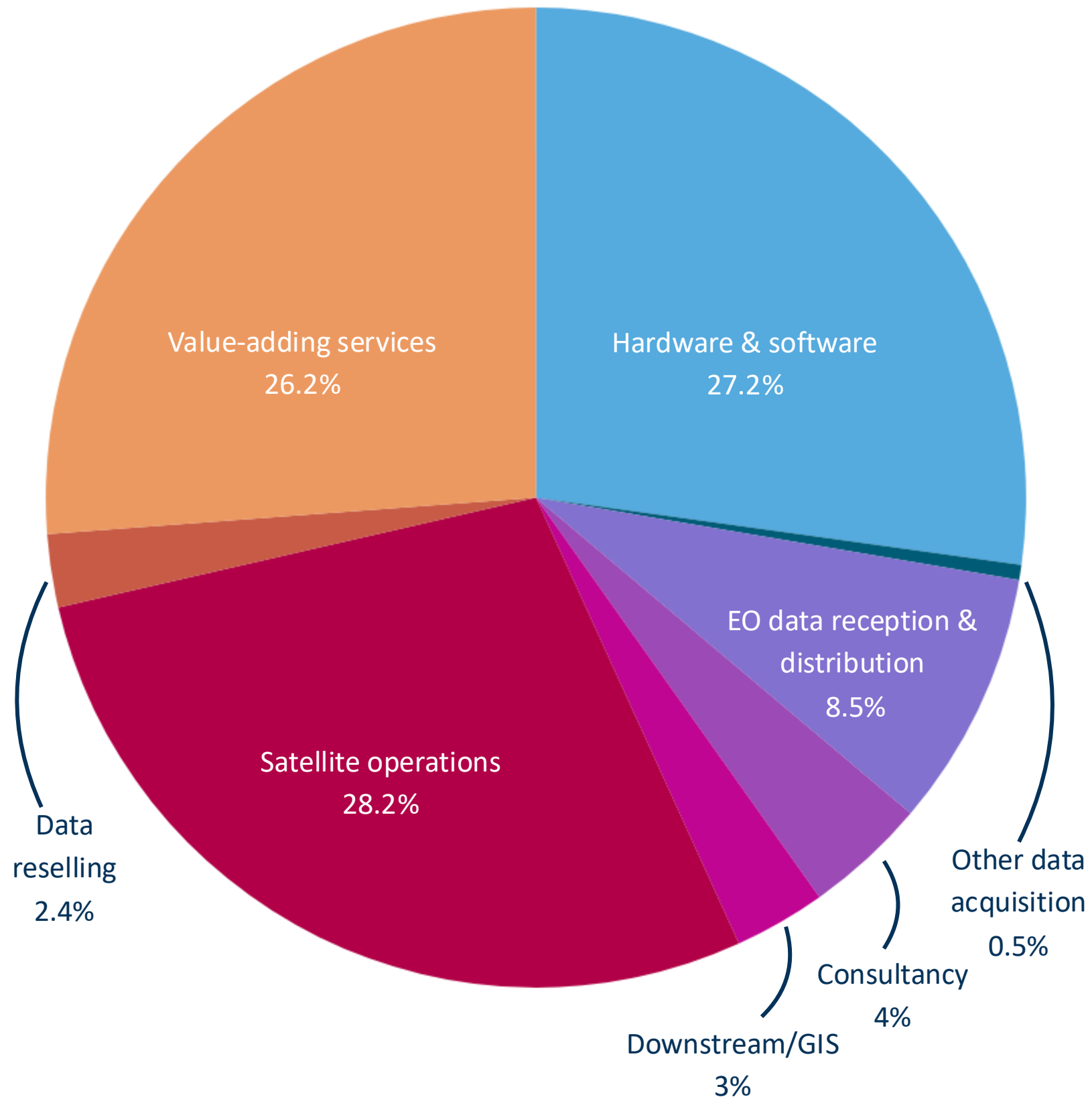
EMPLOYMENT LANDSCAPE



In 2024, the total number of employees in the European EO sector reached 16,036, a 7% increase from the previous year.

Figure 6: Breakdown of employees by company category

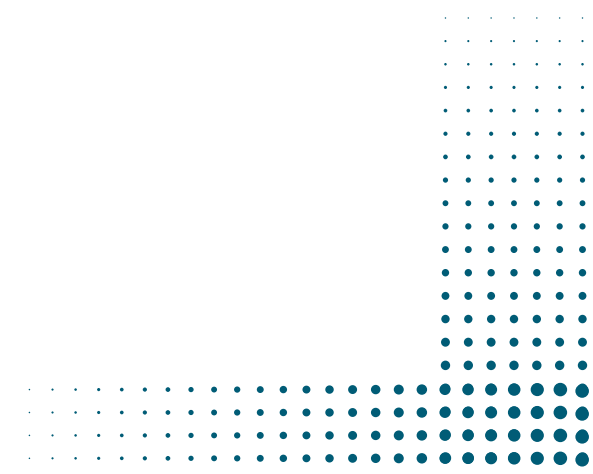
THE VALUE CHAIN



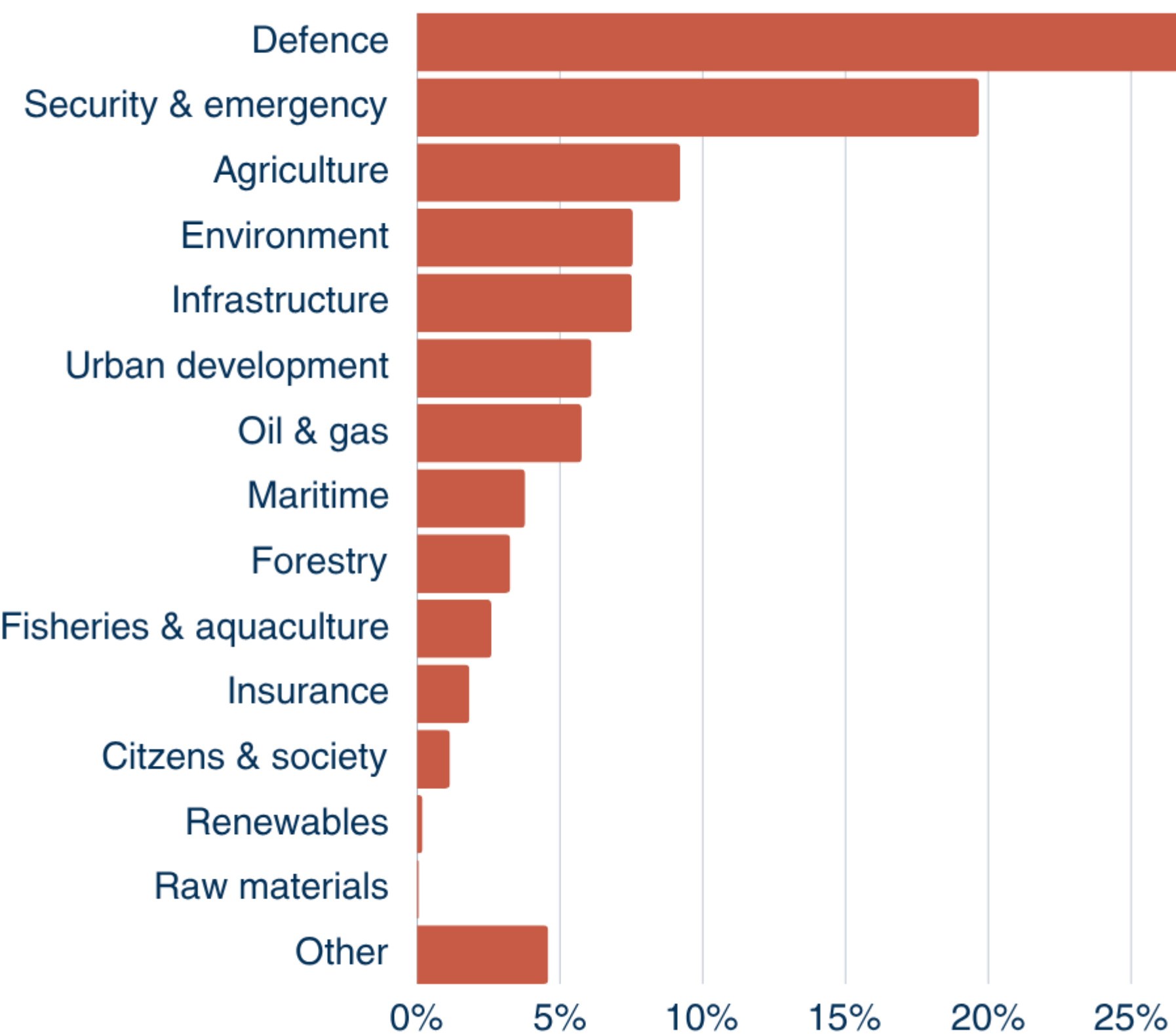
Top three segments account for 82% of market activity:

Satellite operations 28.2% | HW & SW 27.2% | Value-added services 26.2%

Figure 12: Companies main activities in 2024

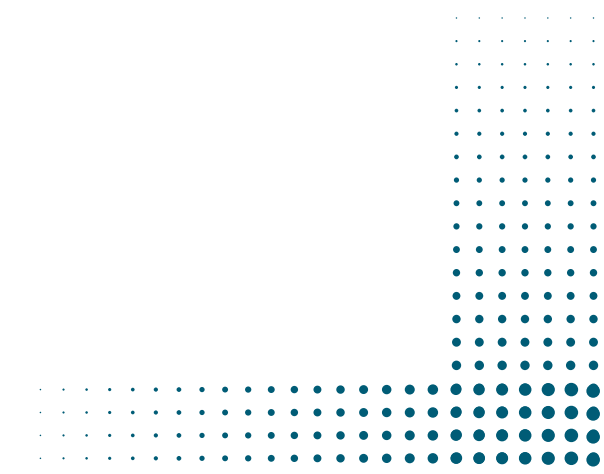


THE MARKETS



Defence is the #1 market segment,
Security & Emergency (#2, up from #4 in 2023),
Agriculture (#3)
Environment (#4).

Figure 13: Companies' main areas of activity by market sector



Activities by Geographic Area

vs. 2023: Africa up (5%#x2192;7.1%), South America up (5%#x2192;6.1%), Oceania up (3%#x2192;11%). Asia down (15%#x2192;9%). Domestic activity steady. Europe share slightly lower (29%#x2192;24.5%).

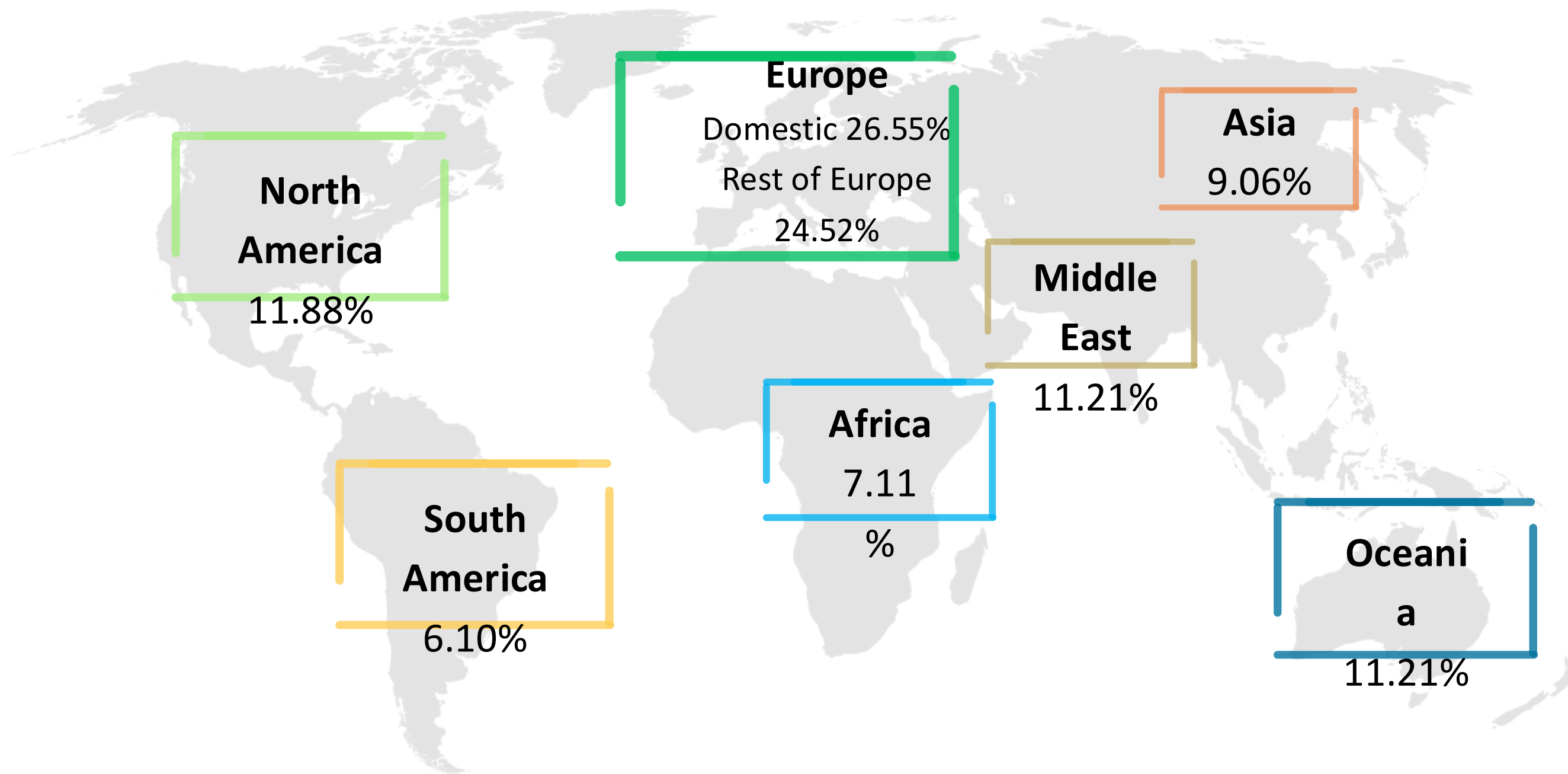
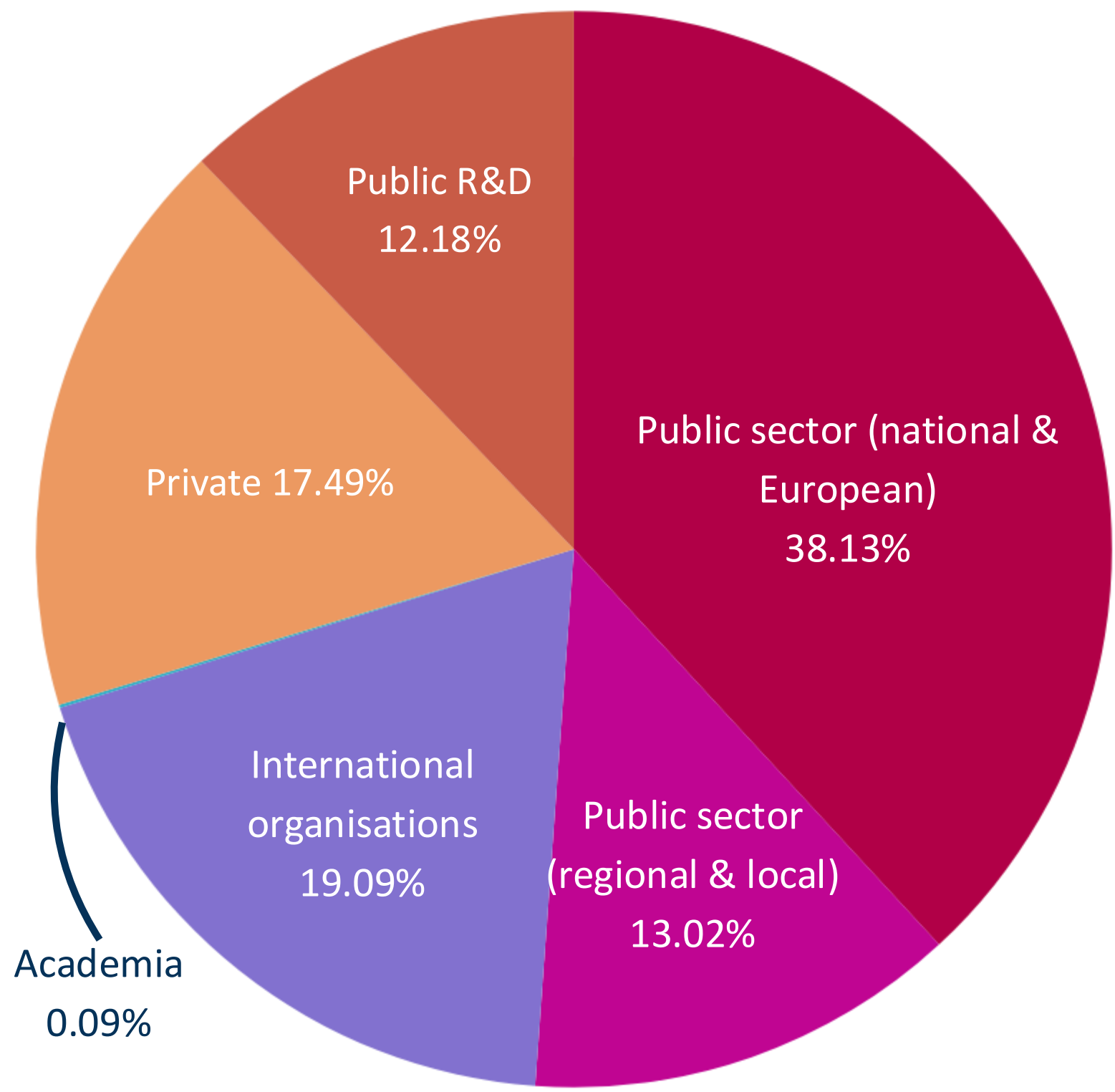


Figure 15: Geographic breakdown of companies' business

Market Share by Customer Type:



Public sector = 51% of revenue. Local & regional authorities doubled (6%→13%), signalling growing mainstream adoption.

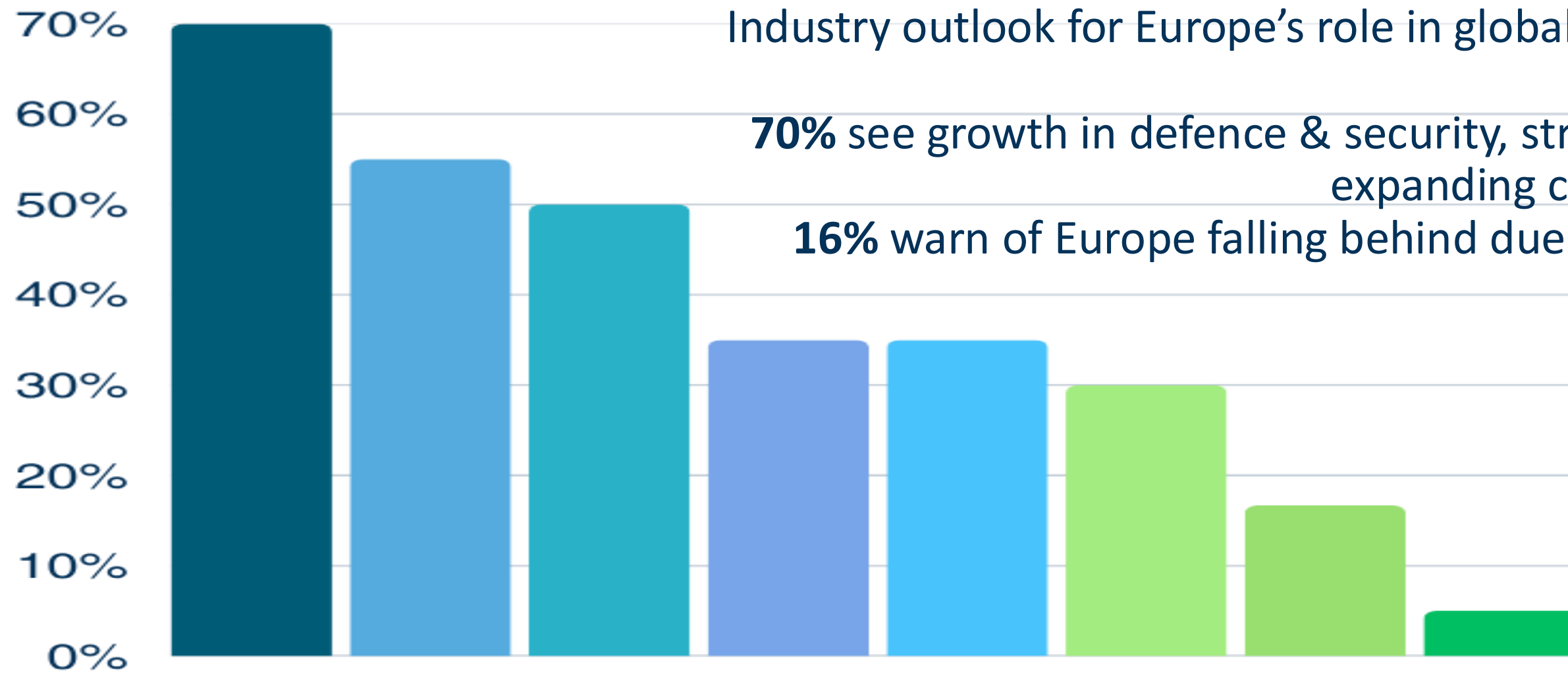
International organisations jumped from 8% to 19% - a notable new demand driver.

Figure 14: Companies' main customer types

EUROPE'S FUTURE IN THE SPACE DOMAIN

EARSC

European Association
of Remote Sensing
Companies

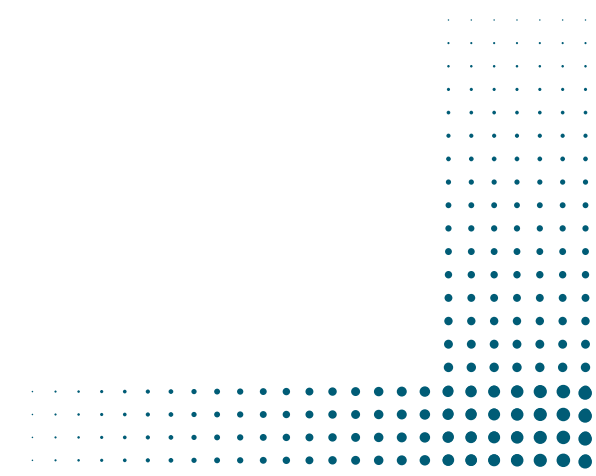


Industry outlook for Europe's role in global space (5-10 year horizon):

70% see growth in defence & security, strategic autonomy, expanding commercial sector

16% warn of Europe falling behind due to fragmentation

Growth in space defence & security
Increased strategic autonomy
Growing commercial sector
Strengthened leadership in key niches
Leading in space sustainability & regulation
Expanding international partnerships
Falling behind due to fragmentation
Other



Fill in EARSC 2026 Industry Survey



Companies

Industry footprint



Employees

Jobs & skills



Revenues

Market value



Growth Rate

Competitiveness



These figures help shape how the EO services industry is reflected in Europe's future investment and policy frameworks.