

TOWARDS A SPACE ECONOMIC DIPLOMACY

CONTRIBUTION OF THE EUROPEAN SPACE INDUSTRY

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Background elements on space markets & satellite export

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ASD-EUROSPACE

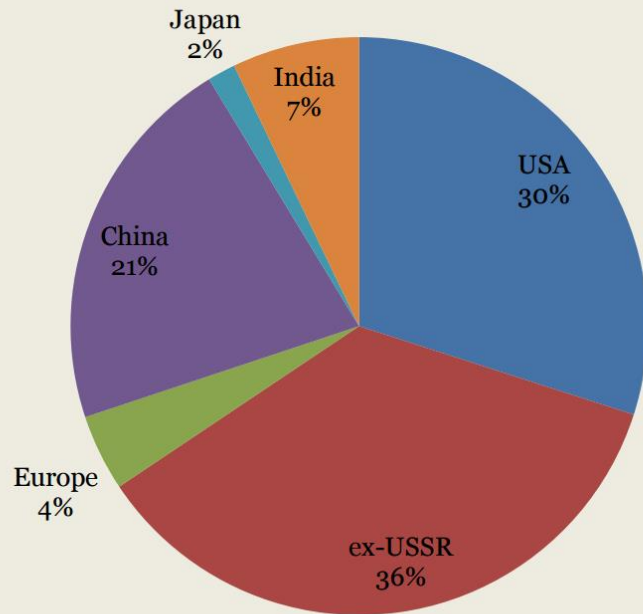
The Space group in ASD

Space industry facts & figures

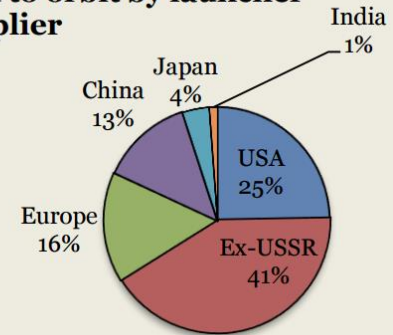
Employment & industry output

2

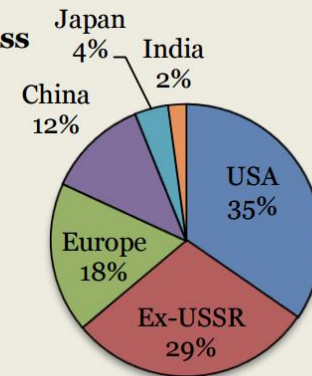
Employment in the space manufacturing sector worldwide (est.)



Total mass launched to orbit by launcher supplier



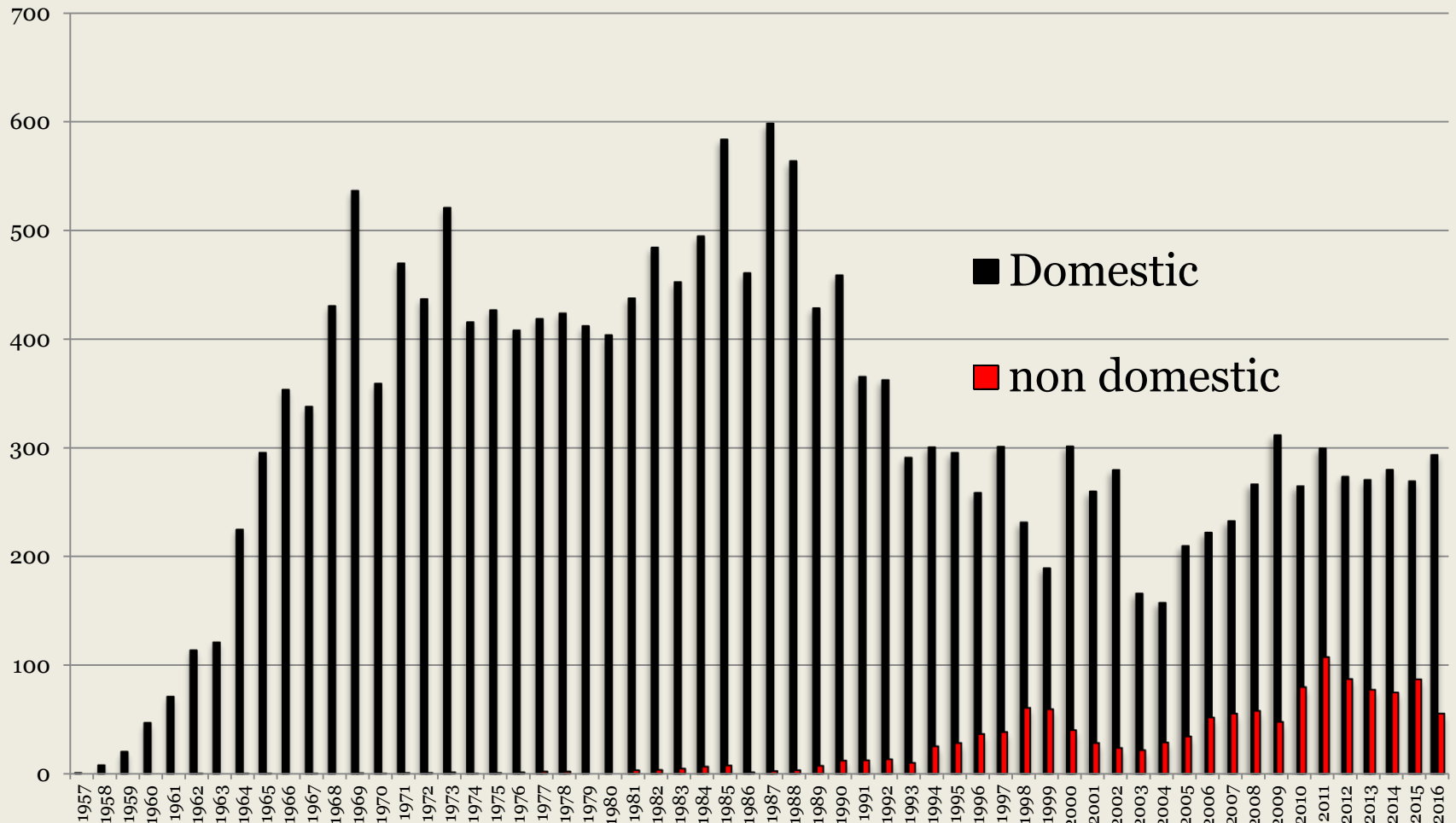
Total Spacecraft Mass



Satellites markets (tons) 1957-2016

Domestic vs non-domestic supply

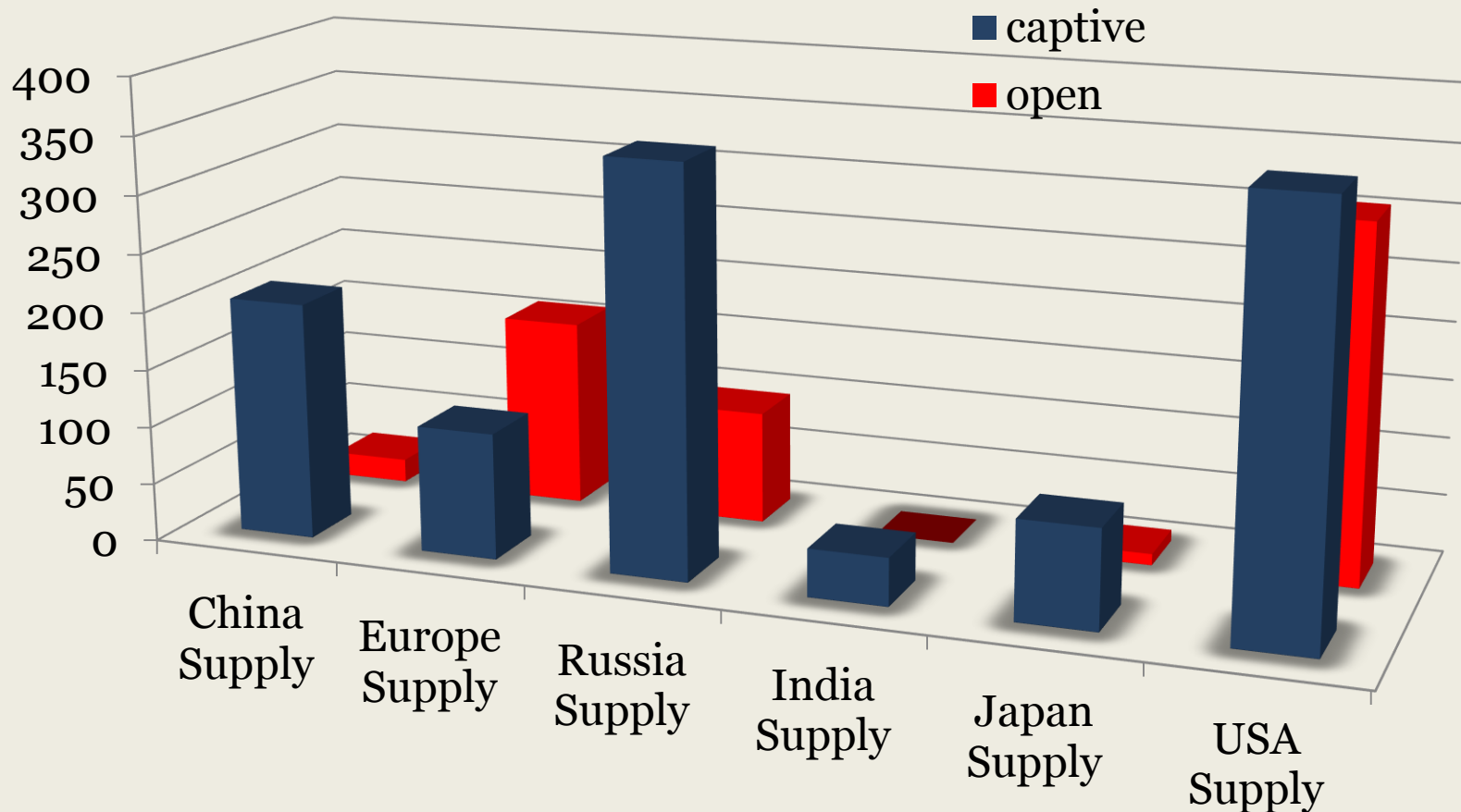
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Satellites supply (tons) 2012-2016

Captive vs open demand

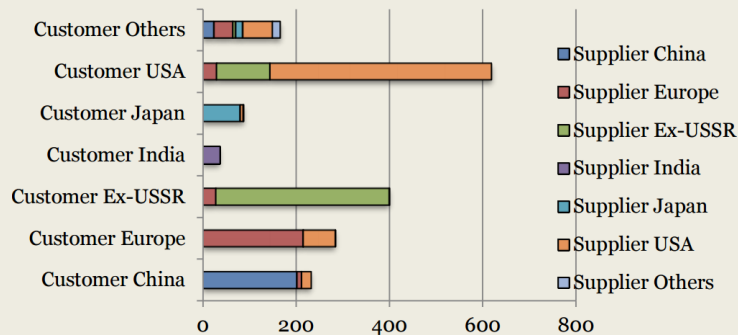
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Highlight on captive and open markets dynamics

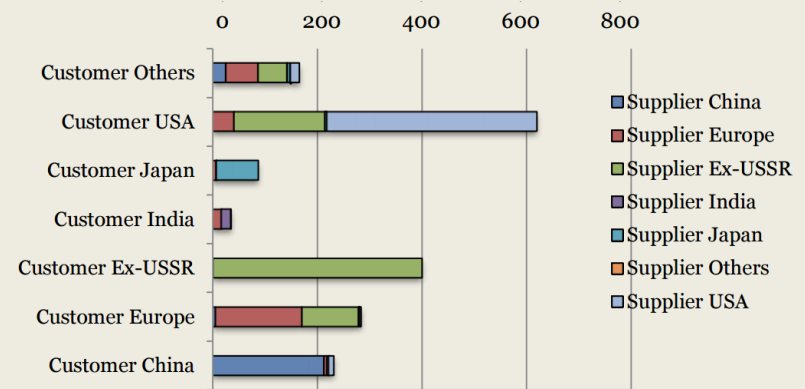
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Global spacecraft markets*



*(mass/tons) 2011-2015

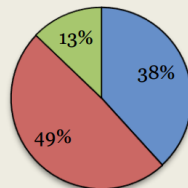
Global launch markets*



Europe's performance on open markets

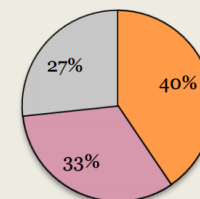
GEO commercial launch market (in mass) 2011-2015

■ Europe share
■ Russia share
■ Others



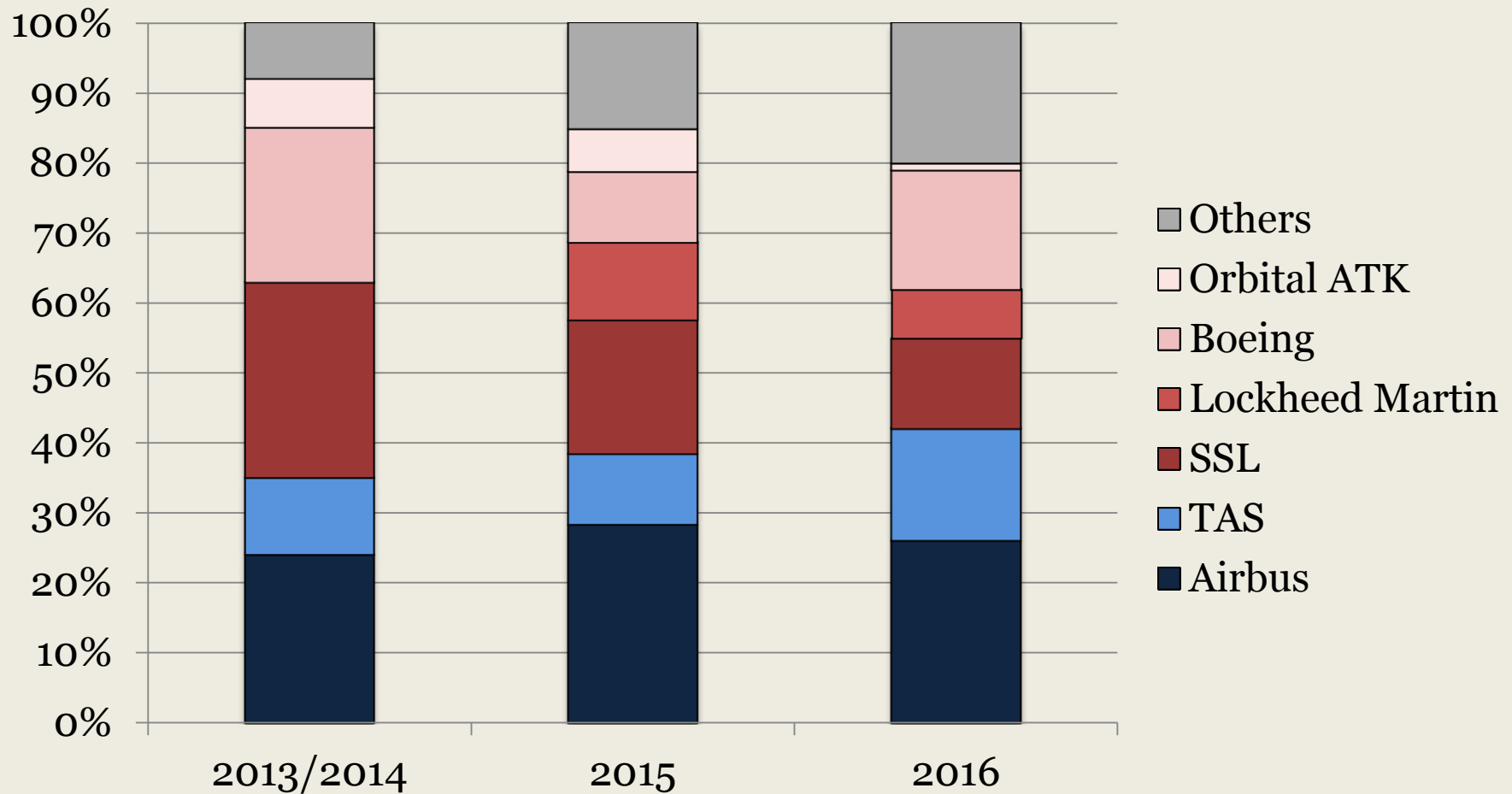
Open satellite market (in mass) 2011-2015

■ US share of open market
■ EUR share of open market
■ Others

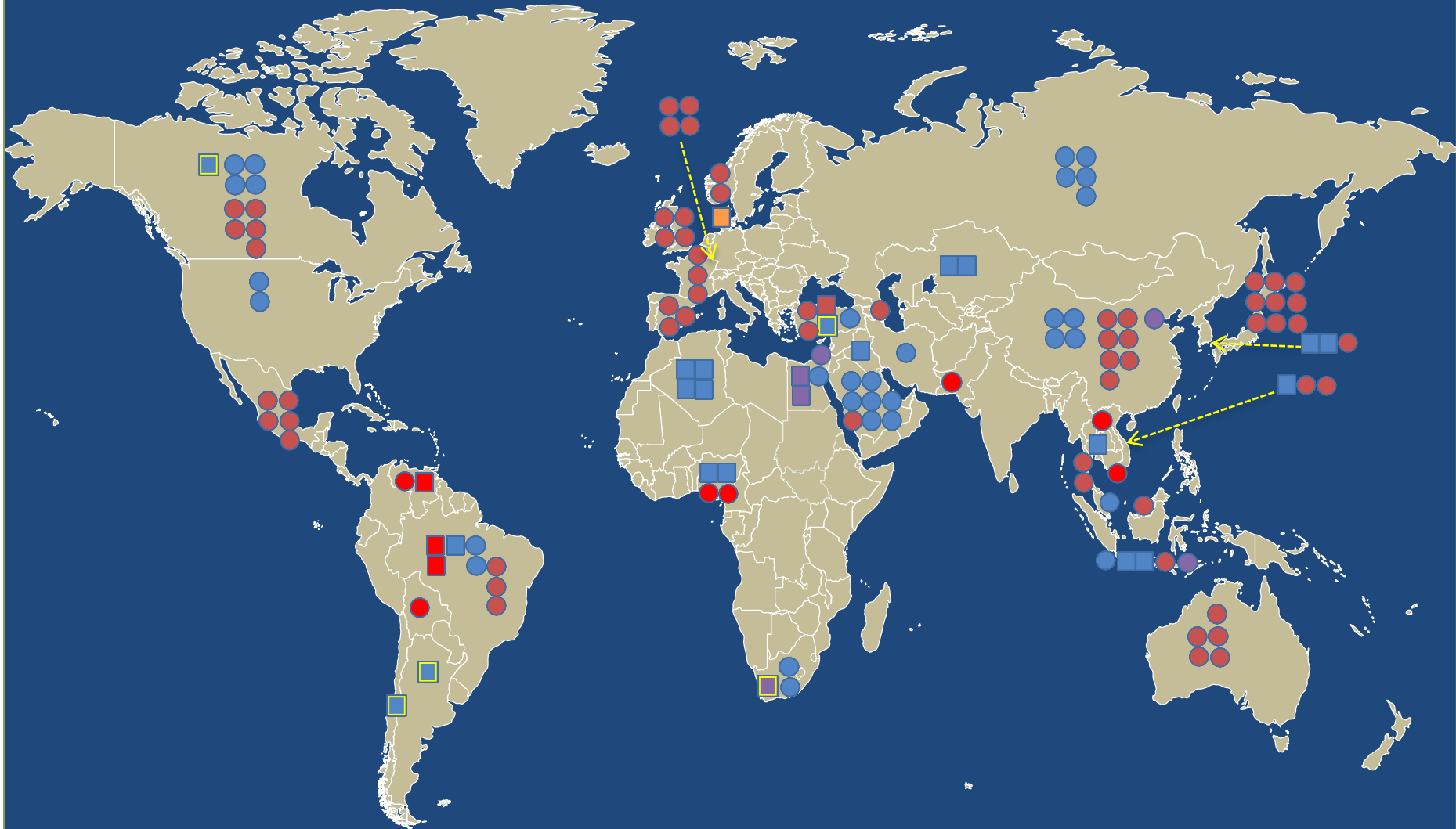


Commercial GEO satellite order intake 2013-2016 by company (% of contract value)

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Ten years of satellite export (2007-2016)



LEGEND

Shape - Application: Remote sensing/Science/technology Geostationary Communications

Color - Supplier country: Europe, Japan, China, USA, Russia

Yellow Border: Military programme

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(source data:

ASD-EUROSPACE Eurospace LEAT database)
The Space group in ASD

« So, what about satellite exports? »

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Global assessment

- 140 satellites exported in the decade (10% of the total production)
- The vast majority of satellites markets strictly domestic and organised regionally
- From the supply side, the USA and Europe are the main players (respectively 69 and 51 satellites exported)
- From the demand perspective, Asia Pacific, Central/Latin America and Europe provide the largest market opportunities

European industry

- Leader in exports for science, technology and Earth observation satellites (20/29)
 - those sold to mainly to government customers.
 - On this market segment Europe competes with China mostly, while the segment is almost not addressed at all by US suppliers
 - still a budding market segment with only 20 tons launched mass in the decade, worth less than 100 M€/year
- This segment bears a strong strategic and political dimension. It includes military systems and may involve technology transfer agreements. It is a typical area of economic diplomacy

US industry

- Leader in exports for large geostationary communication satellites (68/111)
 - Those sold mostly to commercial/private customers
 - Huge impact in terms of market value, worth 1,5 to 2 B€ per year and represents almost 500 tons launched in the decade
- On this market segment US companies compete mostly with European suppliers (31/111) - Chinese competition now a threat
- While US suppliers have easy access to European customers (16 US satellites sold to European customers), the contrary seems not so true (only 2 European satellites sold to US operators)