

European institutional launch service demand 2021-2025

This note provides a brief analytical overview on the prospects of European institutional launch services demand.

Overview

While in the past decades Eurospace had often raised awareness on the difficulty to effectively implement a European launch service preference for the launch of European institutional spacecraft, the prospects for 2021 to 2025 are very positive.

From our analysis, in the next 5 years, 80% of European institutional satellites (excluding cubesats) will be launched by Ariane and Vega. Furthermore, an additional 7% (worth 11% in mass) will be launched by Soyuz at CSG, so that 90% of European institutional launch demand in the next 5 years will be served by Arianespace. This is a major improvement on the past decade, and is a tangible effect of European policies.

However, the future is not all bright. Indeed, the volume of European institutional demand is still quite low, with an average 25 tons to be launched per year in 2021-2025. Considering the launch capacity of Vega (1-3 tons in LEO) and Ariane (5-10 tons in GTO, and 6 to 20 tons in LEO), the aggregated European institutional demand is far from providing sufficient activity to sustain a high launch rate for these systems, particularly considering Ariane.

Therefore Arianespace will have to rely extensively, as it had in past decades, on the demand from commercial and export customers. The quest for achieving the highest competitiveness of European launch systems is not over.

Key charts

