

# MARKET BRIEF: EARTH OBSERVATION



Adam Keith

**SMALLSAT SYMPOSIUM,  
SILICON VALLEY 2020**





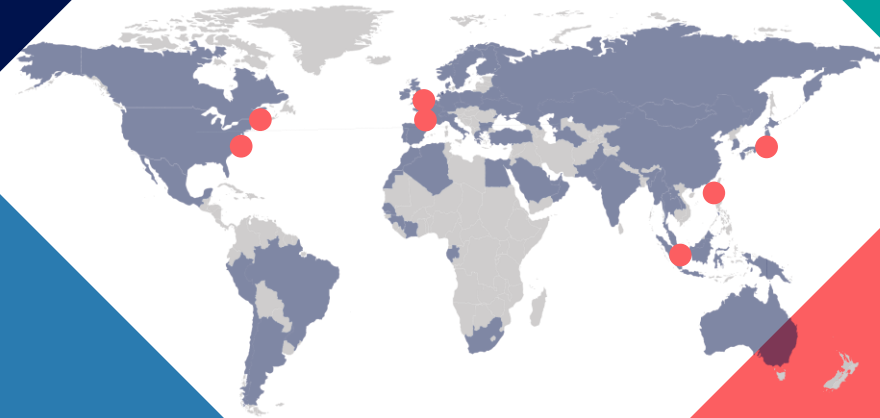
# WHO WE ARE?



**TAILORED  
CONSULTING  
SERVICES**

Corporate strategy  
Government programs  
Due diligence  
Feasibility studies  
RFI/RFP process  
Program monitoring  
Support to operations

**600** clients  
in **50** countries,  
**7** global locations



**THEMATIC  
RESEARCH  
PRODUCTS**



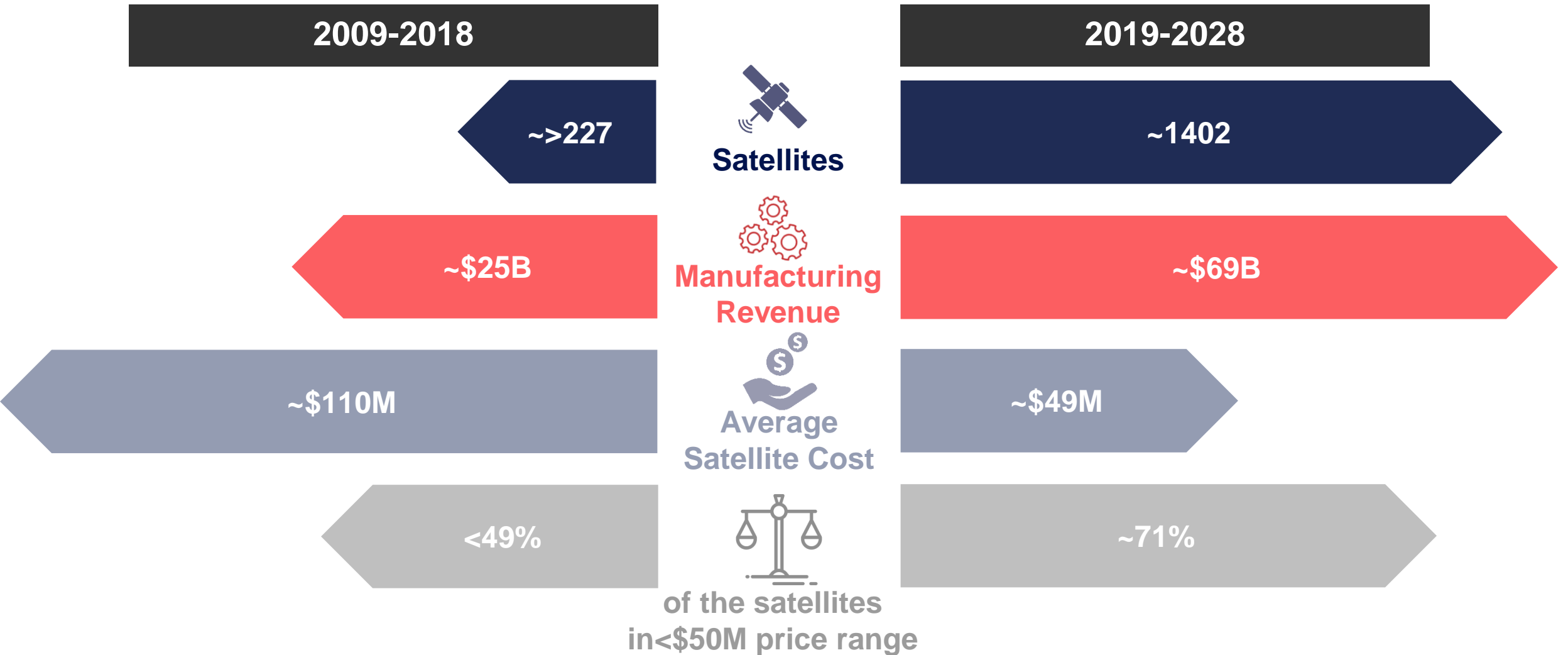
**THEMATIC  
TRAINING**



**EXECUTIVE  
SUMMITS**



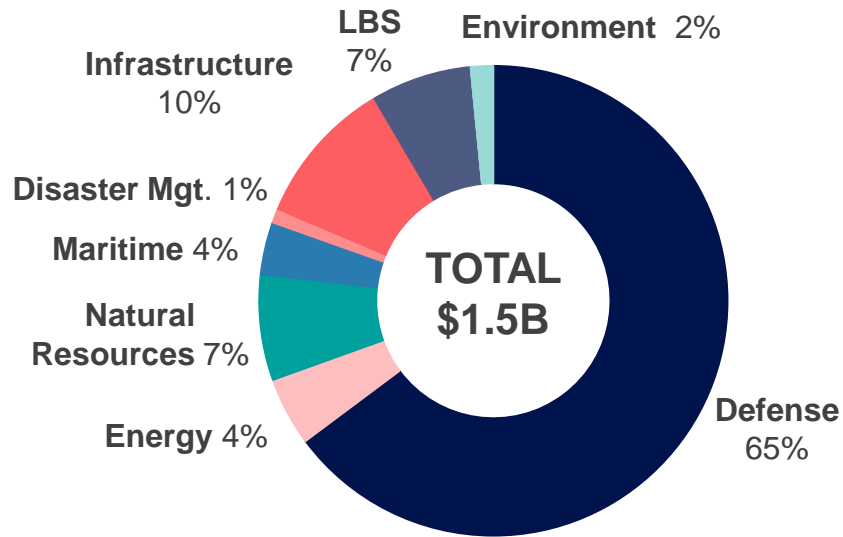
# MAJOR SHIFT IN EO SATELLITE MANUFACTURING\*



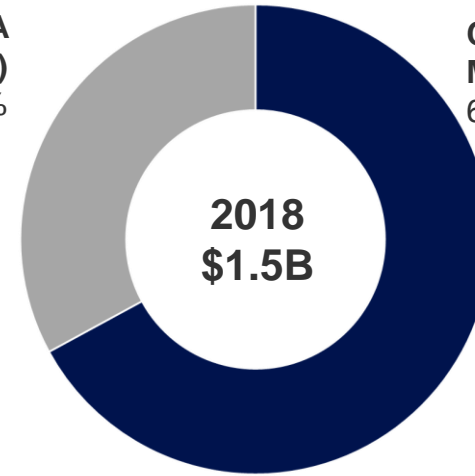
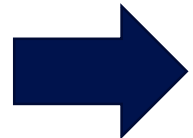
**\*FOCUS ON COMMERCIAL SATELLITES >50KG (NON-METEO)**



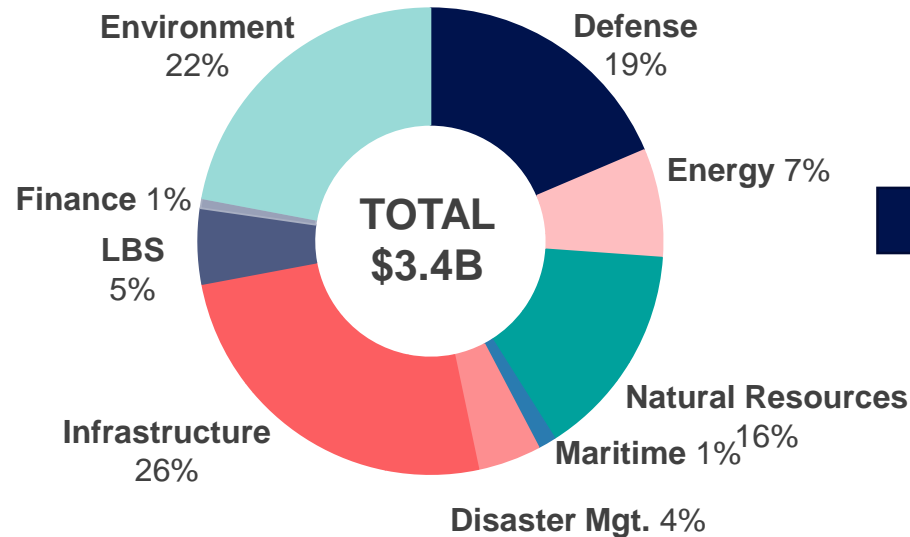
# THE CURRENT COMMERCIAL EO REALITY



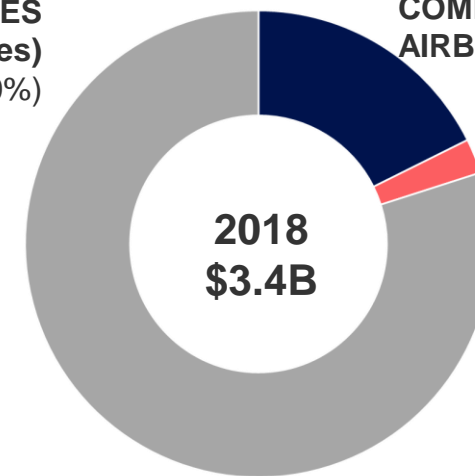
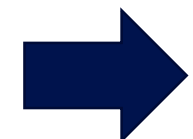
**OTHER COMMERCIAL DATA**  
(~12 operators)  
33%



**CONSOLIDATED COMMERCIAL DATA MARKET**



**OTHER VAS COMPANIES**  
(>1000 companies)  
(80%)

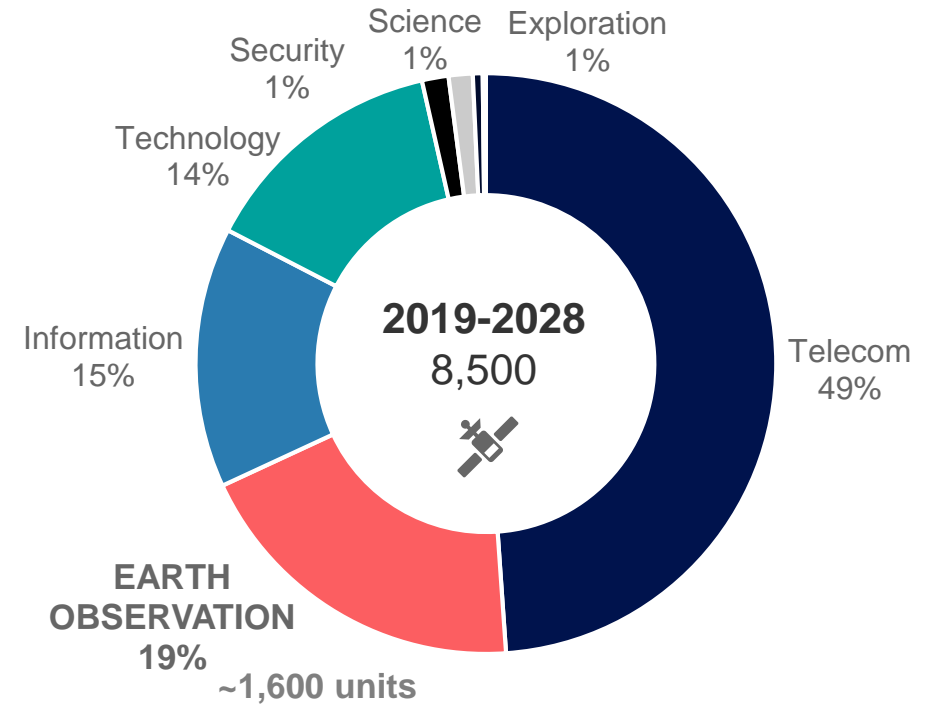
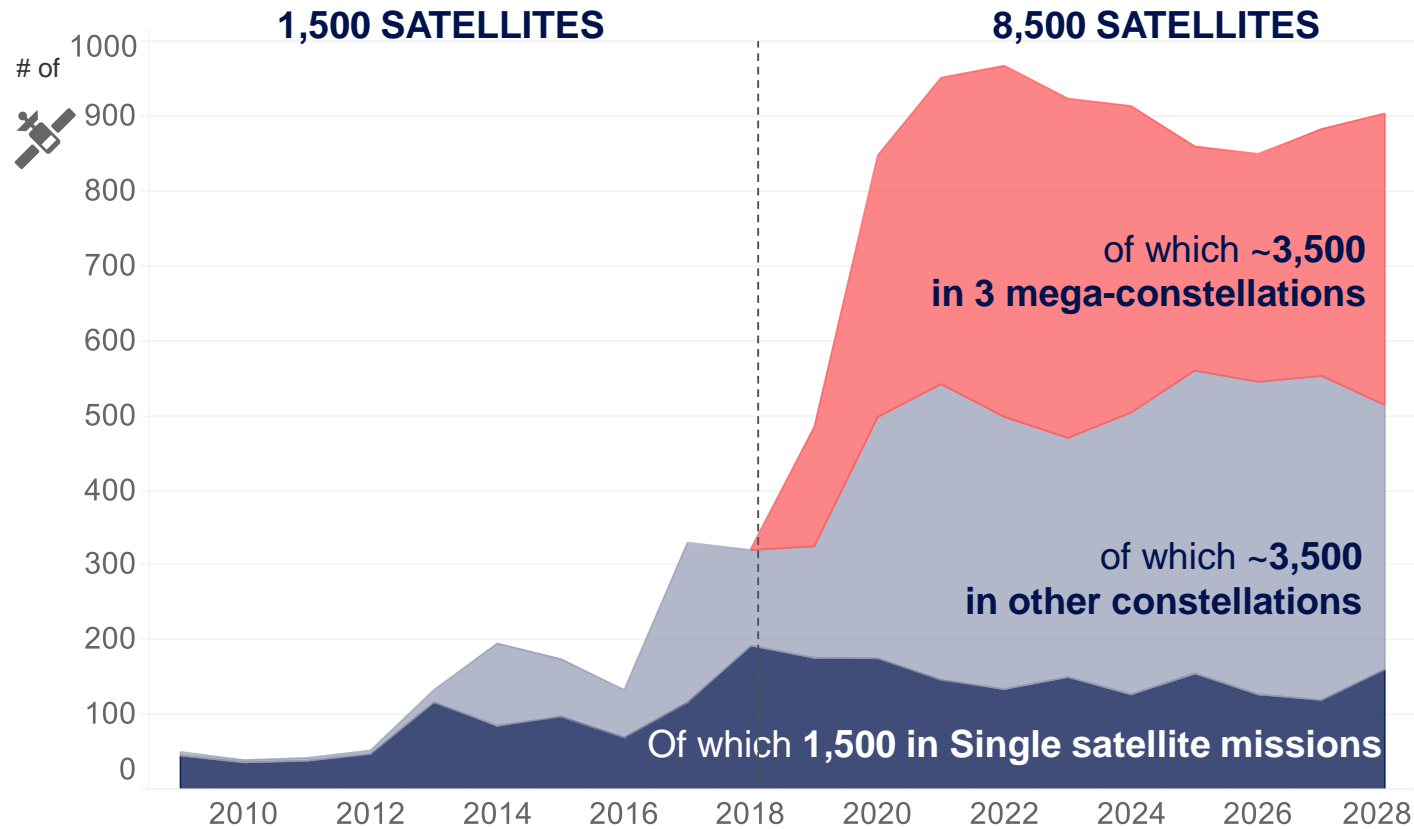


**FRAGMENTED SERVICES/ INFORMATION MARKET**



# SMALLSAT SUPPLY EXPANSION

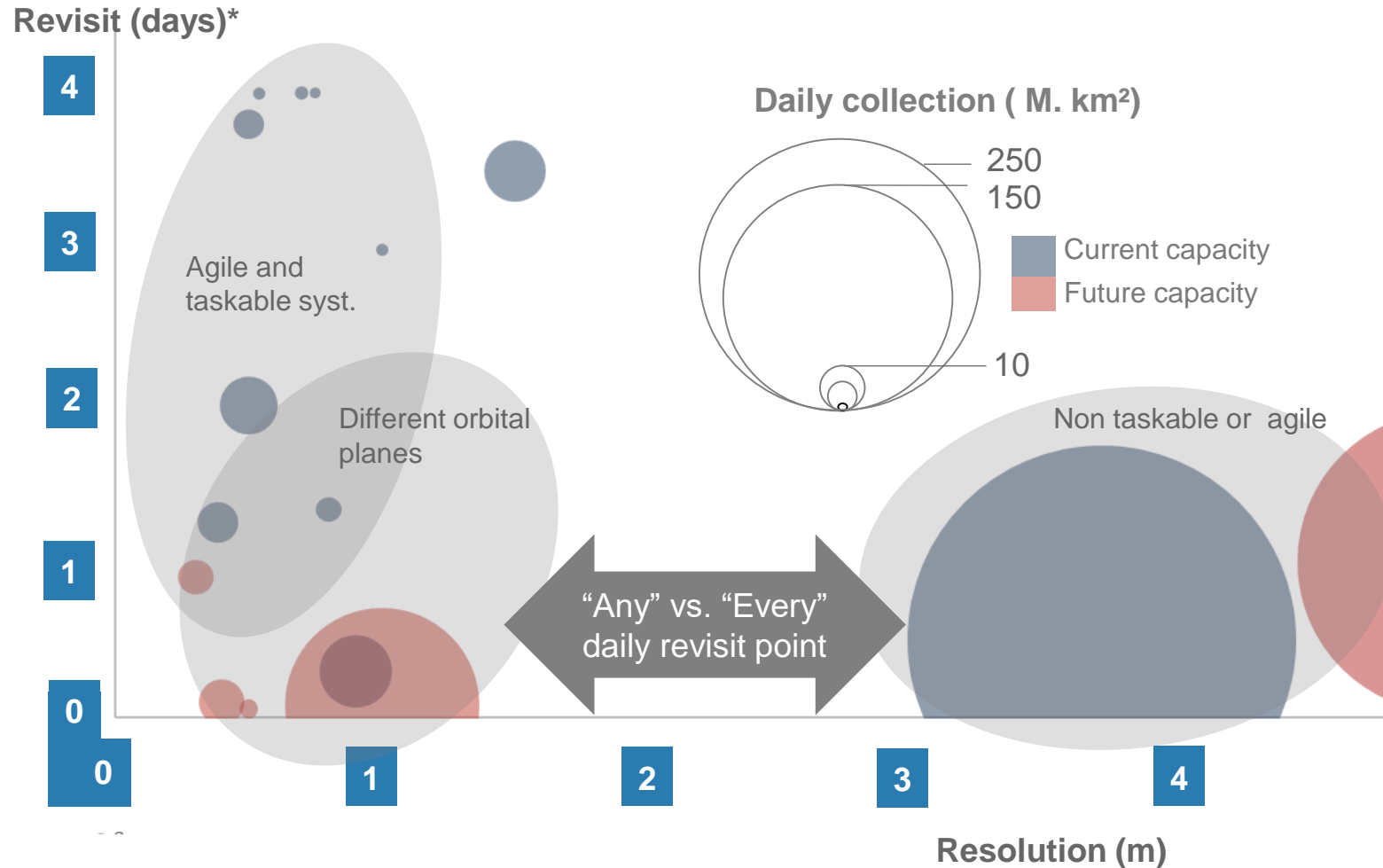
## ALL SMALLSATS & OPERATORS



**SIMILAR OBJECTIVE FOR ALL EO OPERATORS: LOW-COST, HIGH FREQUENCY DATA COLLECTION TO SUPPORT CHANGE DETECTION ANALYTICS AND INFORMATION DELIVERY**



# NOT JUST MORE DATA – BUT DIFFERENT RESOURCES

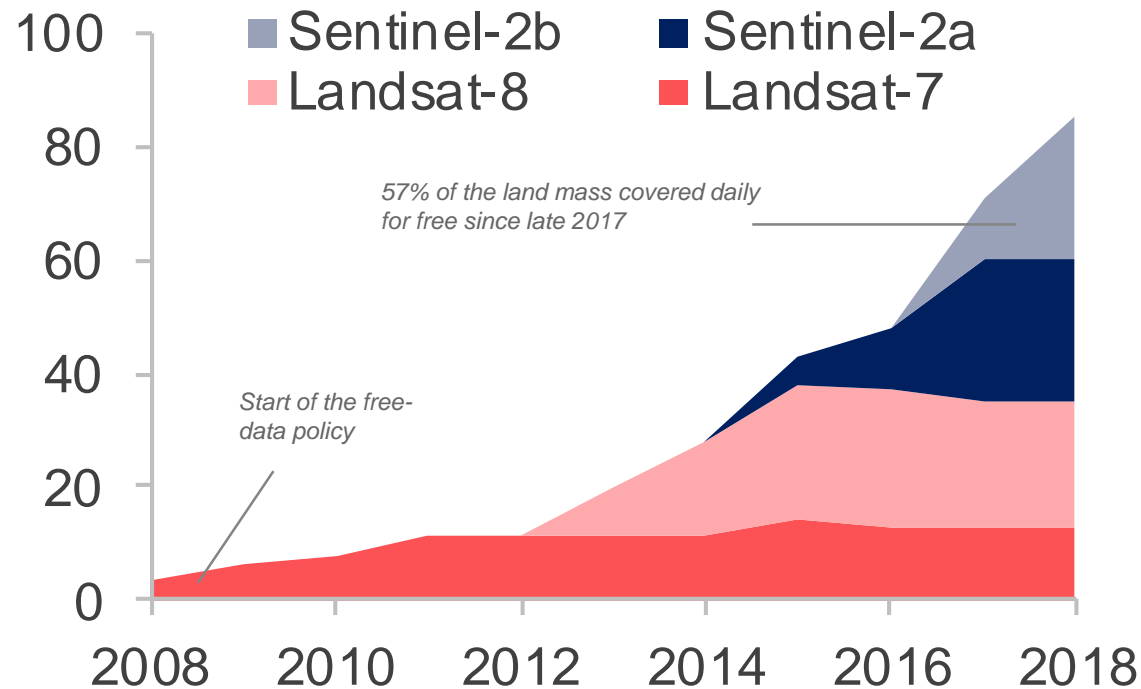


- **Constellations** as the future standard
- **“Daily” revisit: any vs. every point**
- **Swath vs resolution**
- **Taskable vs. automatic acquisition**
- **On-demand vs. subscription**

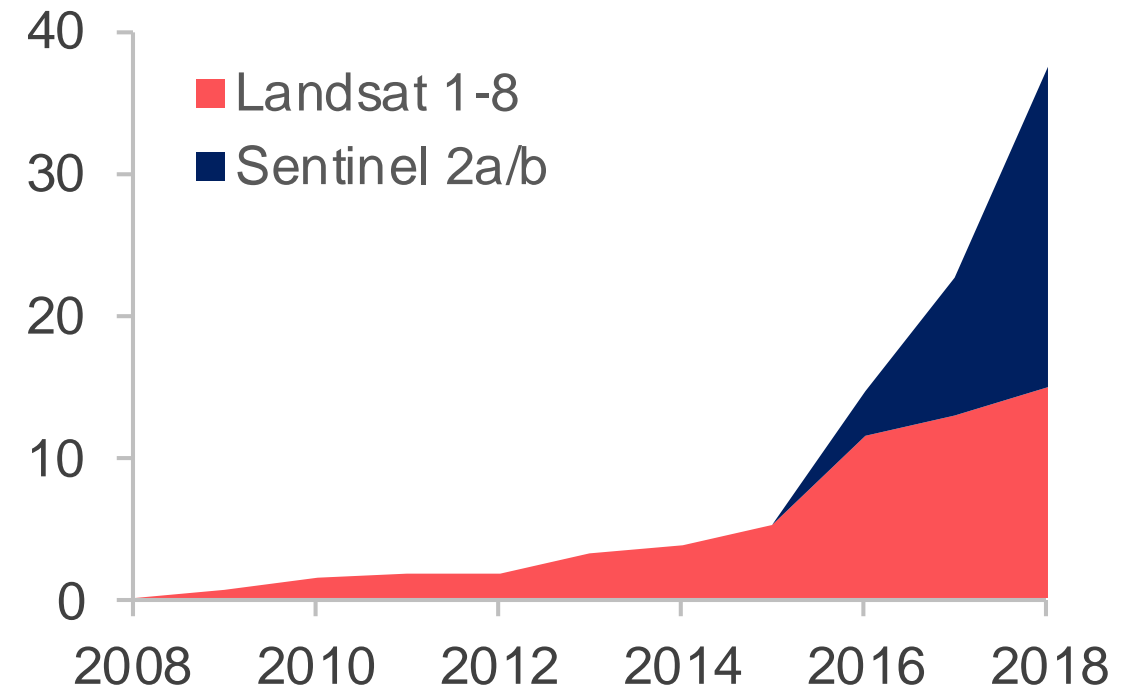


# FREE DATA POLICY TO SUPPORT SERVICES DEVELOPMENT

### FREE DATA DAILY COLLECTION CAPACITY (OPTICAL, MILLION KM2)



### FREE DATA YEARLY CONSUMPTION - DOWNLOADS (PB est.)

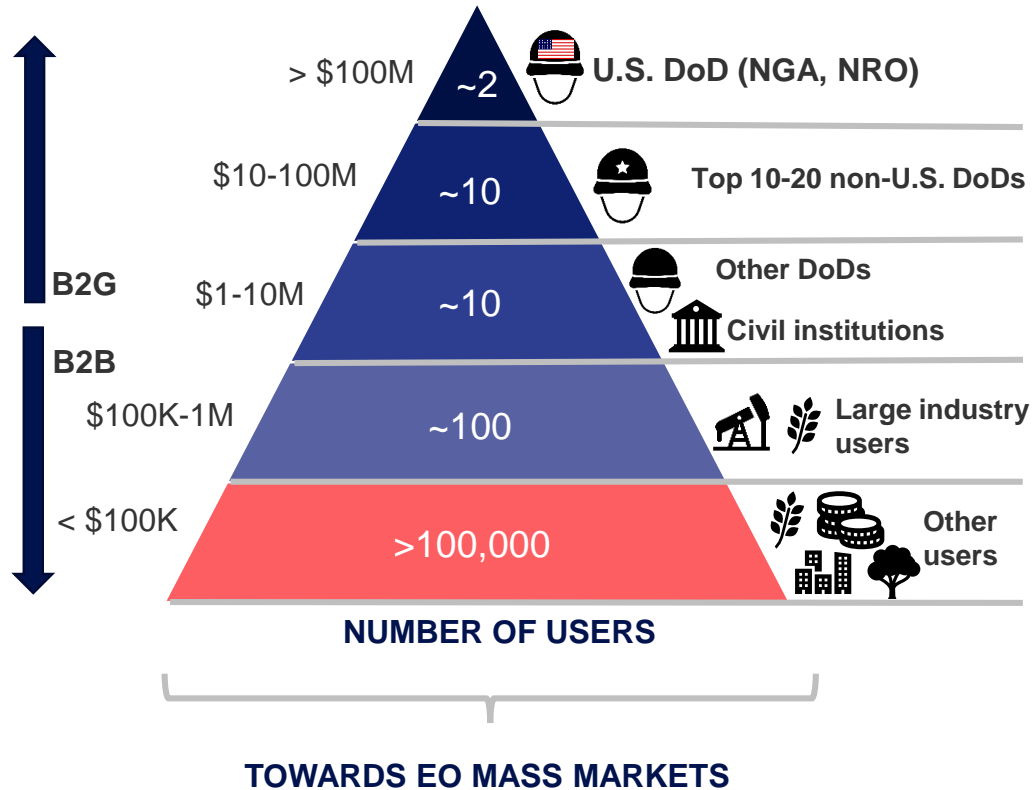


Source: Landsat estimate based on acquired/downloaded scenes and typical scene data size, Copernicus reporting

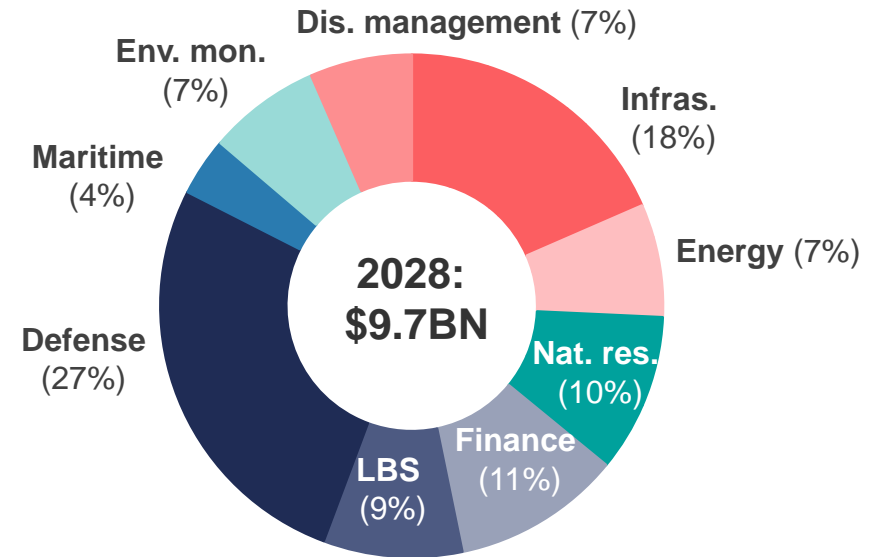


# CHANGING MARKET FOR EARTH OBSERVATION SOLUTIONS

## SCHEMATIC EO VAS ANNUAL PROCUREMENT



## VAS UPSIDE MARKET 2028



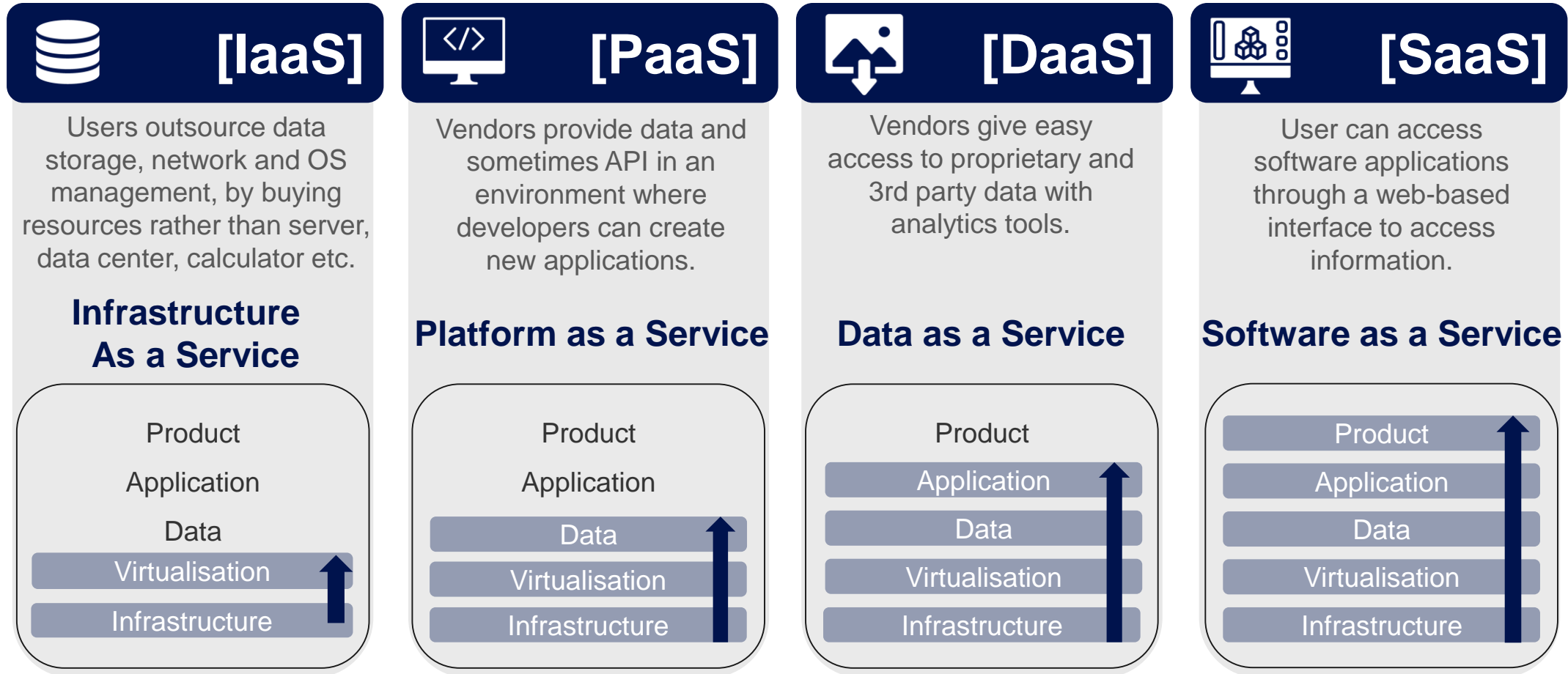
- Services emerging based on low-cost supply: more limited ARPU, but greater mass market
- Services based on change detection analytics which businesses may subscribe: price points measured in the \$K as opposed to \$M

**Shifting EO from a mostly B2G business to more B2B.**





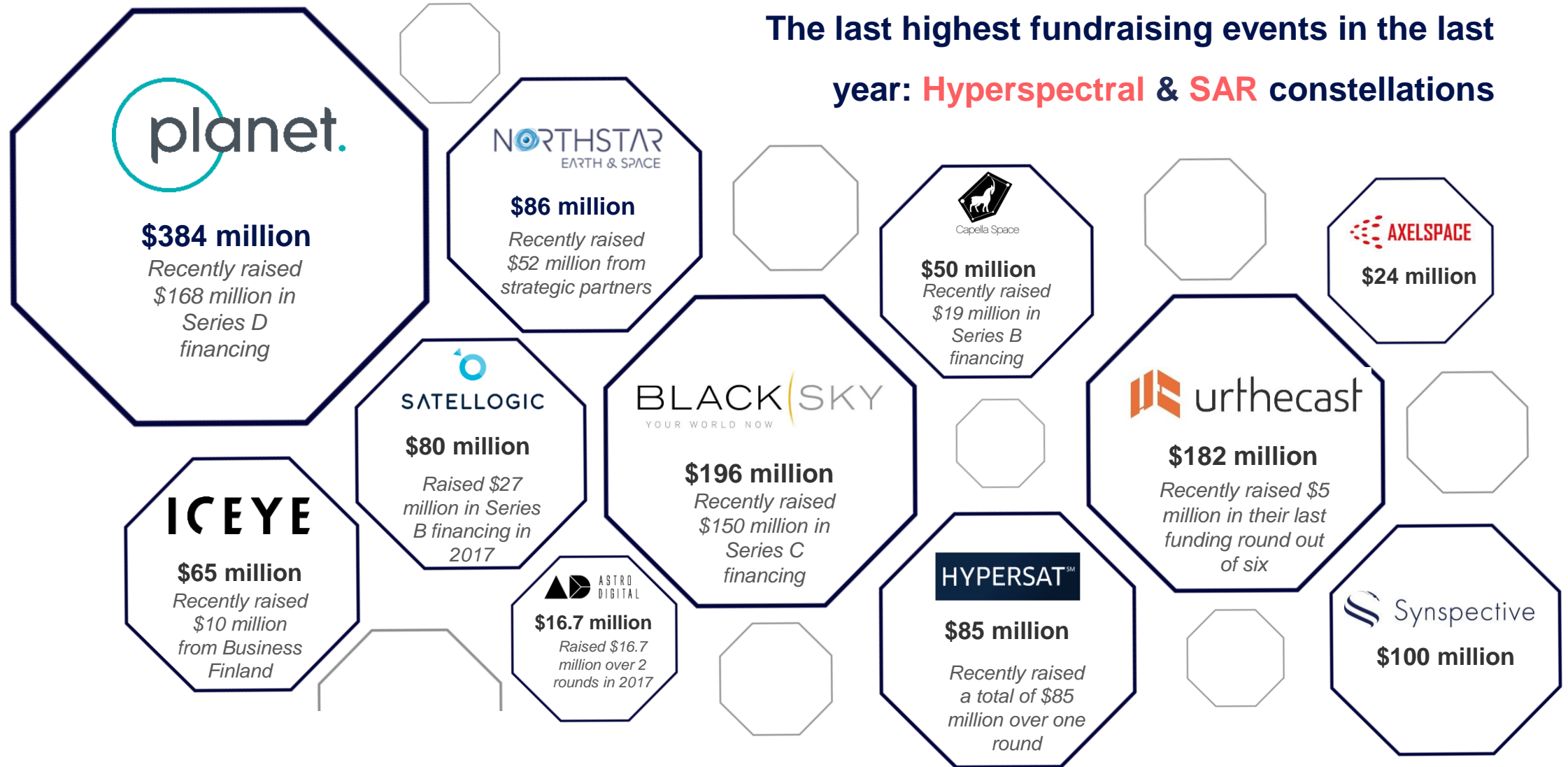
# INCREASING SERVICES INTEGRATION





# INVESTMENT INTO NEW EARTH OBSERVATION OPERATORS

The last highest fundraising events in the last year: **Hyperspectral** & **SAR** constellations

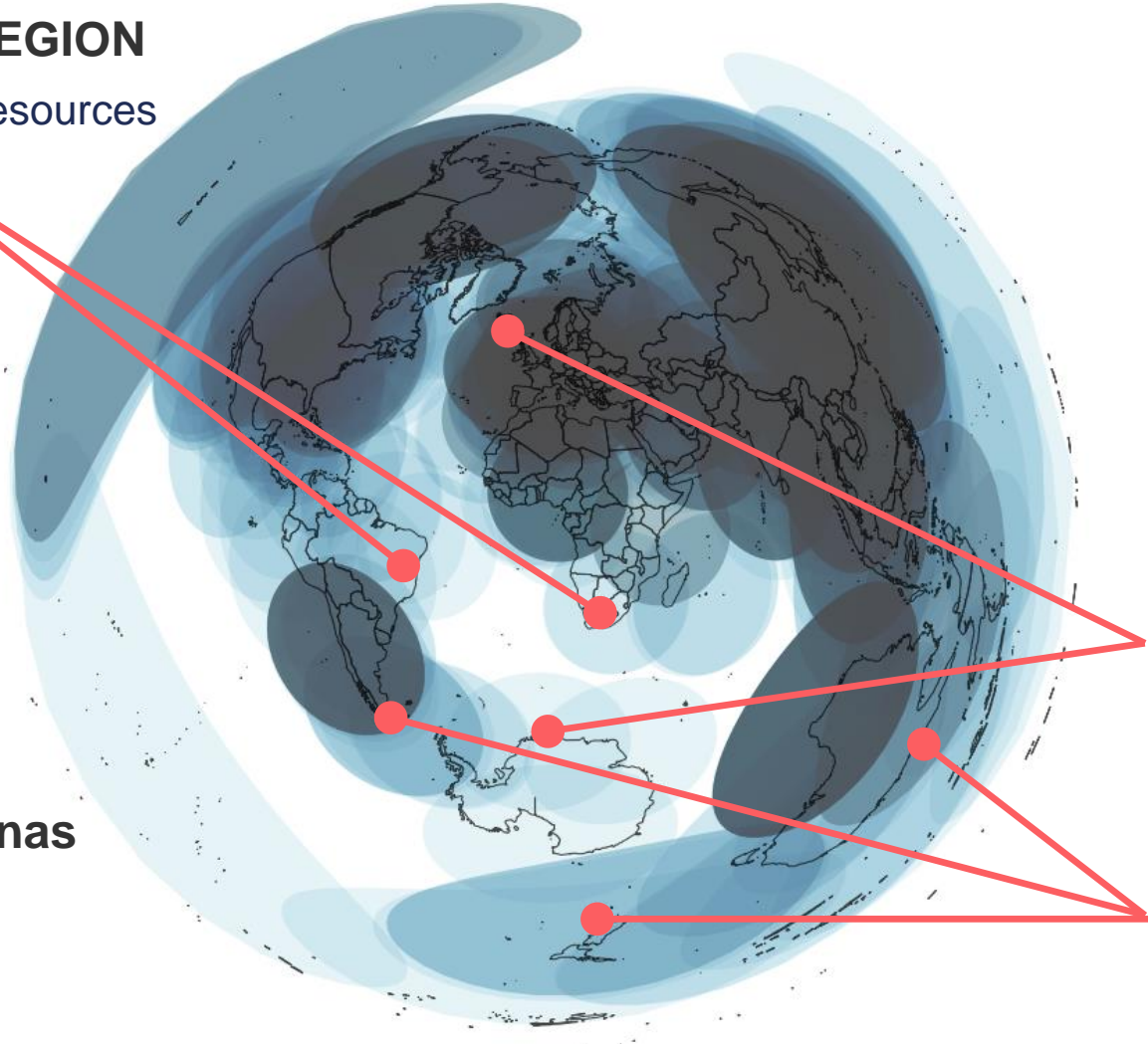




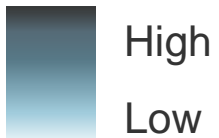
# GEOGRAPHICAL DENSITY OF EO ANTENNAS TO INCREASE

## LOW-COVERED REGION

- Interest to monitor resources



## Density of antennas



## EO Ground Segment Market:

- Currently estimated at ~\$40M
- Expected 5y CAGR ~7.5%

## New trends:

- New frequencies: Ka-band/Optical link
- New commercial sites to increase
- New ground segment service providers

## POLES

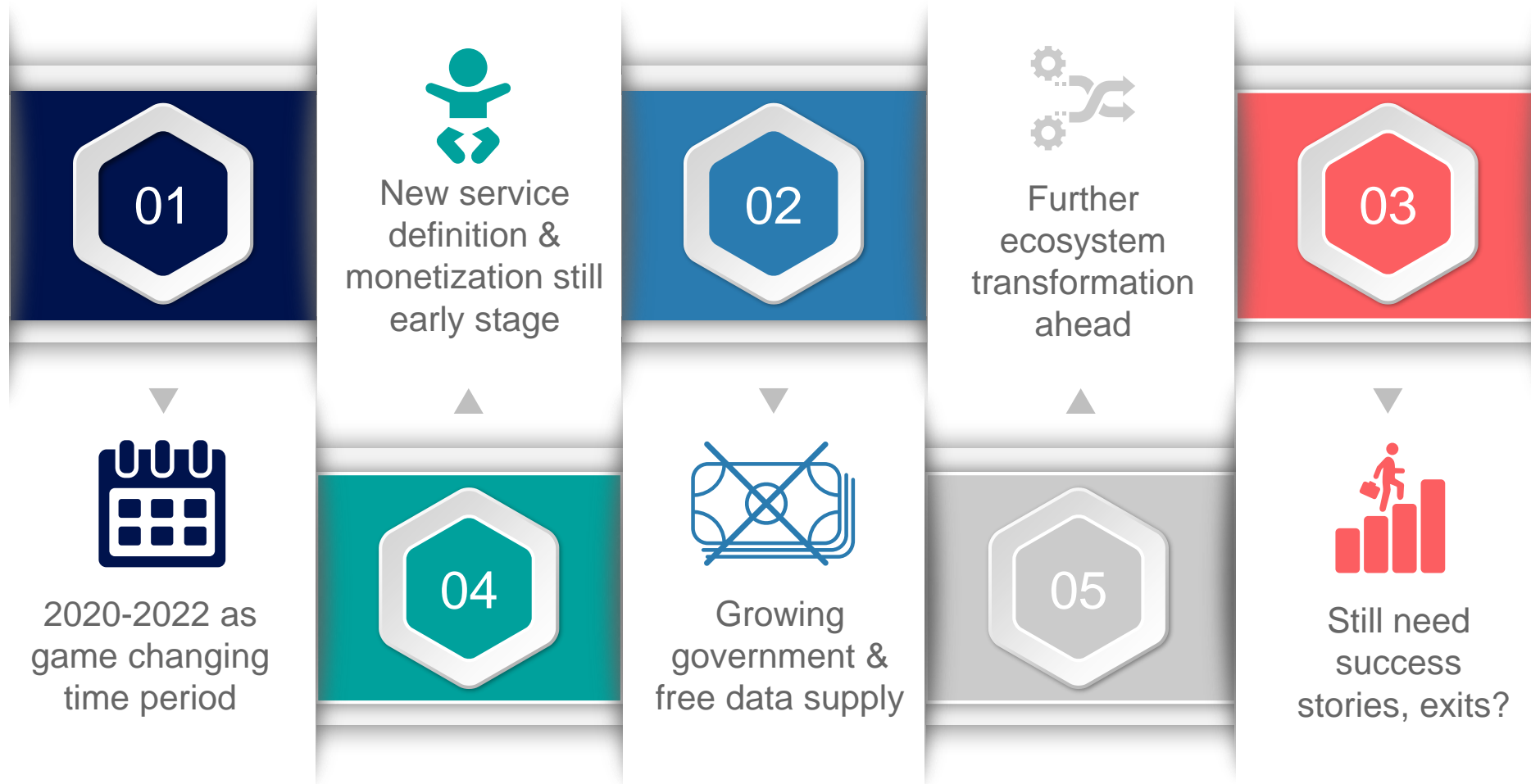
- Maximize number of passes
- Strategic position for data relay in LEO satellites context

## POTENTIAL GROWTH

- Mid-latitudes to decrease latency
- Interest for maritime applications
- Close to South Pole with easy access



# TAKEAWAYS



Muchas Gracias

Дякую

Danke

Merci

谢谢

شكرا

Thank you

спасибо

Հնորհակալութիւն

ありがとうございました

Euroconsult Group

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