

# COLLABORATIVE SPACE & GEOSPATIAL VALUE CHAIN TOWARDS A SUSTAINABLE INDUSTRY

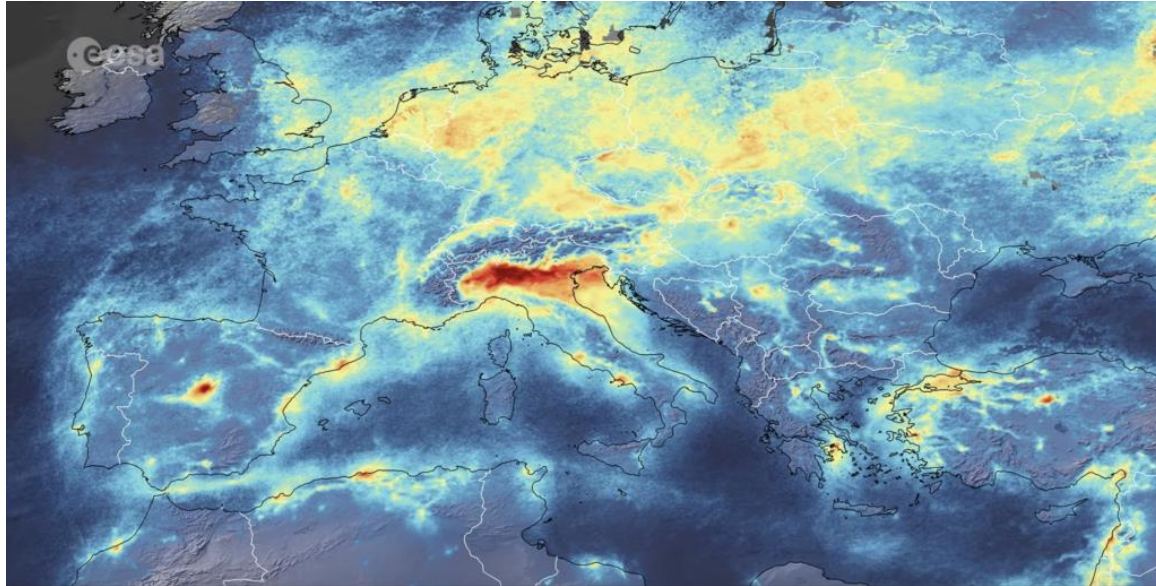
**GEOSPATIAL WORLD FORUM 2021**

Sylvain DRILHOLLE, Senior Consultant





# 2020-2021 IN A NUTSHELL



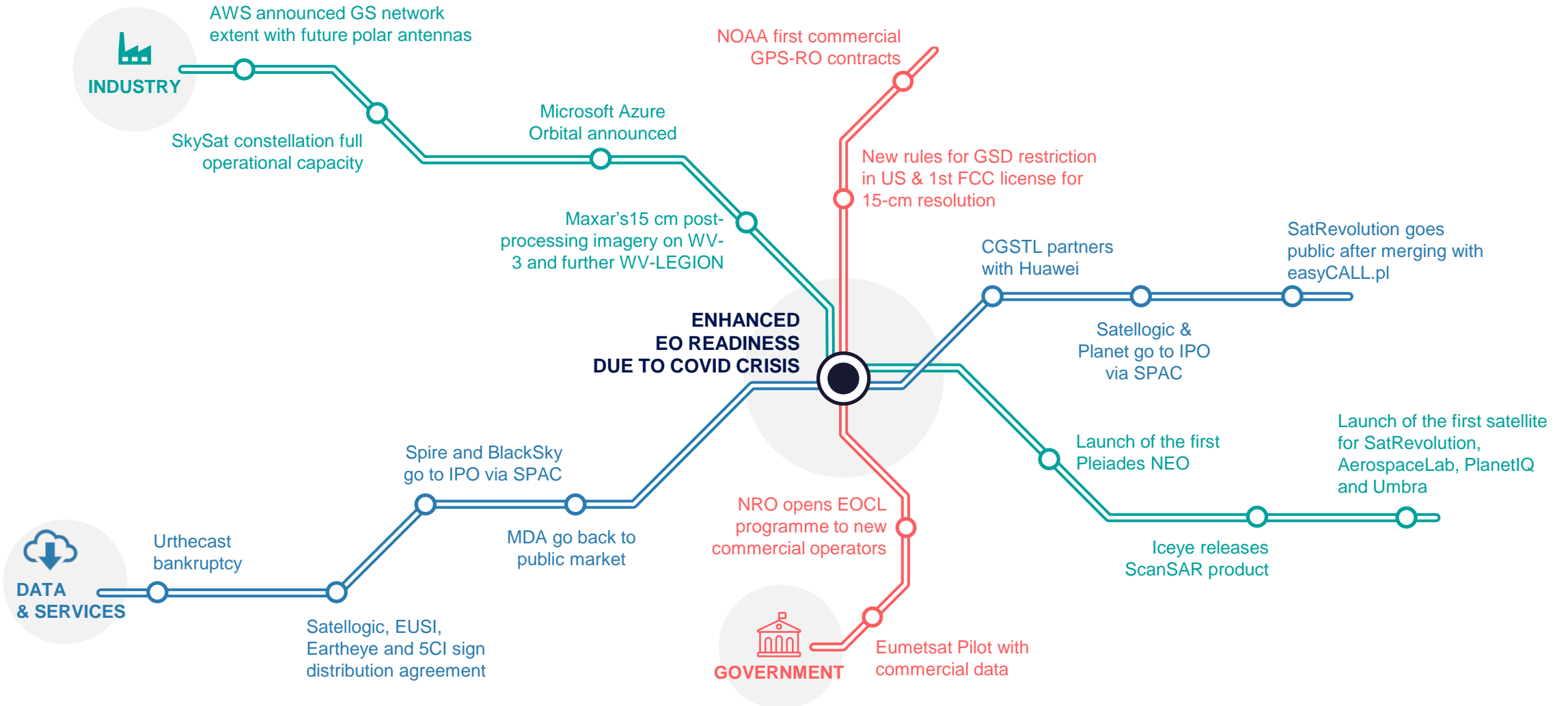
**AIR POLLUTION DROP IN EUROPE DURING THE LOCKDOWN**

## NEW HOSPITAL BUILT IN WUHAN





# 2020-2021 IN A NUTSHELL



Source: Euroconsult – Earth Observation Data & Services Market



# THREE DECADES OF EVOLVING BUSINESS MODELS IN EO

1990

2025

## The Incumbents

## Global outreachers

## The Gapfillers

  
Value proposition

- Optical & SAR satellite series
- Resolution race
- Exquisite data & services

- Large constellations (Optical & SAR)
- Global mapping & high revisit
- Low-cost data & services

- Mid size constellations (radar, HSI, TIR, etc.)
- Combination with free data
- Low-cost data & services

  
Target markets

- Defense & Security
- Premium BtoG / BtoB

- Defense & Security
- Multiple BtoG / BtoB

- Specific sector verticals  
**OR**
- Specific regional markets
- Defense & Security

SAMPLE  
OF  
PLAYERS

MAXAR

AIRBUS

isi  
IMAGESAT INTL

MDA

e-geos  
AN ASI / TELESPAZIO COMPANY

SATELLOGIC

planet.

BLACK SKY



Capella Space

CG  
SATELLITE

ICEYE

tomorrow.io

Climavision

Orbital  
Sidekick

GHGSat  
GLOBAL EMISSIONS MONITORING

HYPERSAT

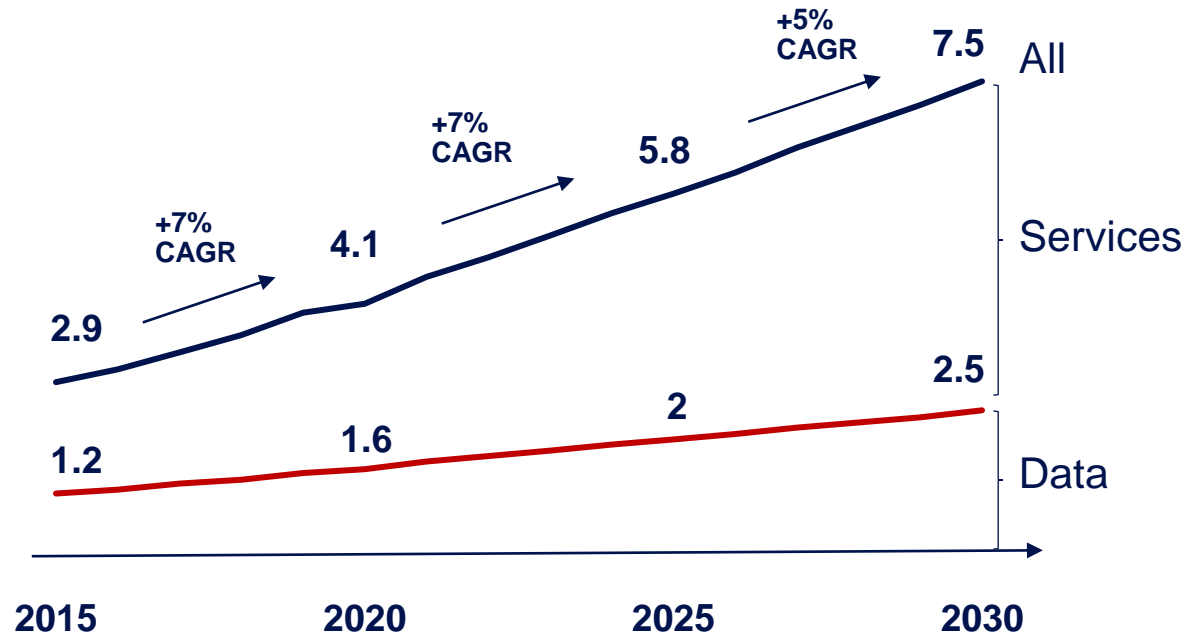
HySpecIQ  
HYPERSPETRAL INTELLIGENCE

Synspective



# GROWTH AMID PRICE PRESSURE & DIVERSIFICATION

## GROWTH PROFILE OF THE EO COMMERCIAL MARKET



- **Constellations** addressing diversified sets of sensors & resolutions to impact data price points & leverage to build VAS.
- **VAS** to represent 70% of total commercial revenues by 2030 (<60% in 2015)
- **50cm GSD data** to grow at 12% CAGR driven by premium customers
- **Data market** remains structurally highly consolidated  
Top 2 players = 57% of global revenues
- **Service market** is by nature fragmented but is consolidating.  
Top 2 players = 31% of global revenues

Source: Euroconsult – Earth Observation Data & Services Market

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

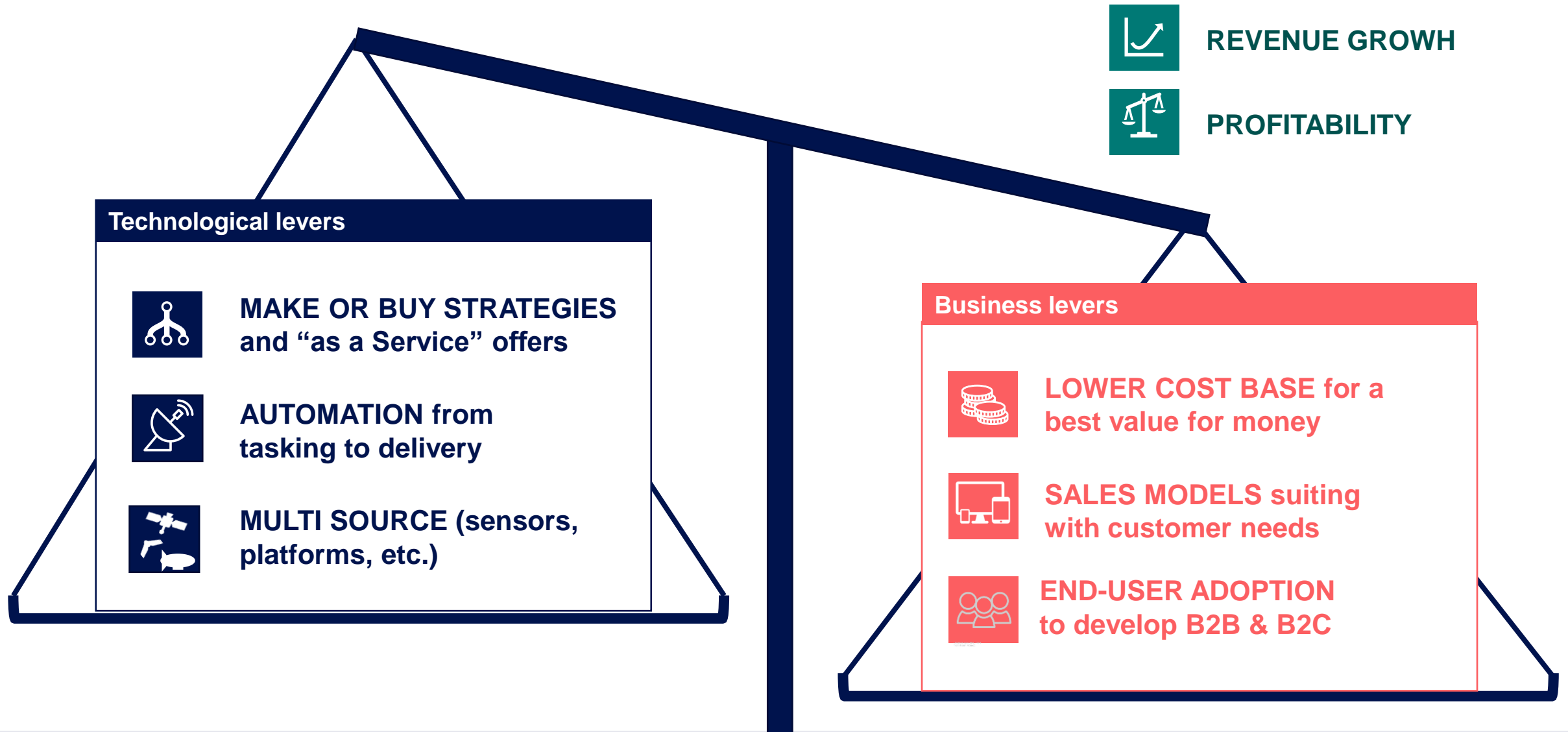
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France · USA · Canada · Japan · Australia

[drilholle@euroconsult-ec.com](mailto:drilholle@euroconsult-ec.com)



# THE ROADMAP AHEAD? KEY FACTORS FOR SECTOR'S GROWTH

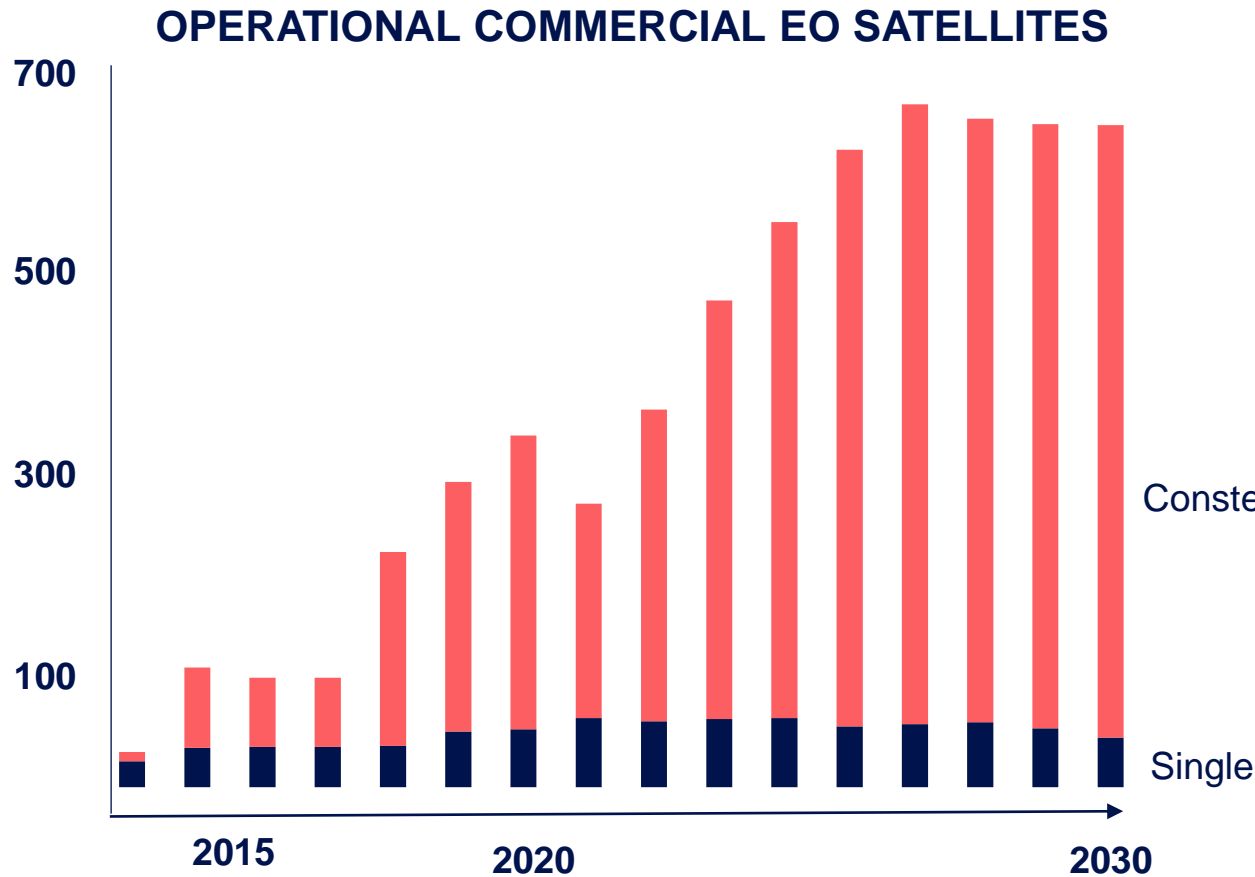






# BUILDING NEW SERVICES WITH NEW SUPPLY

## CAPACITY UPRISING...



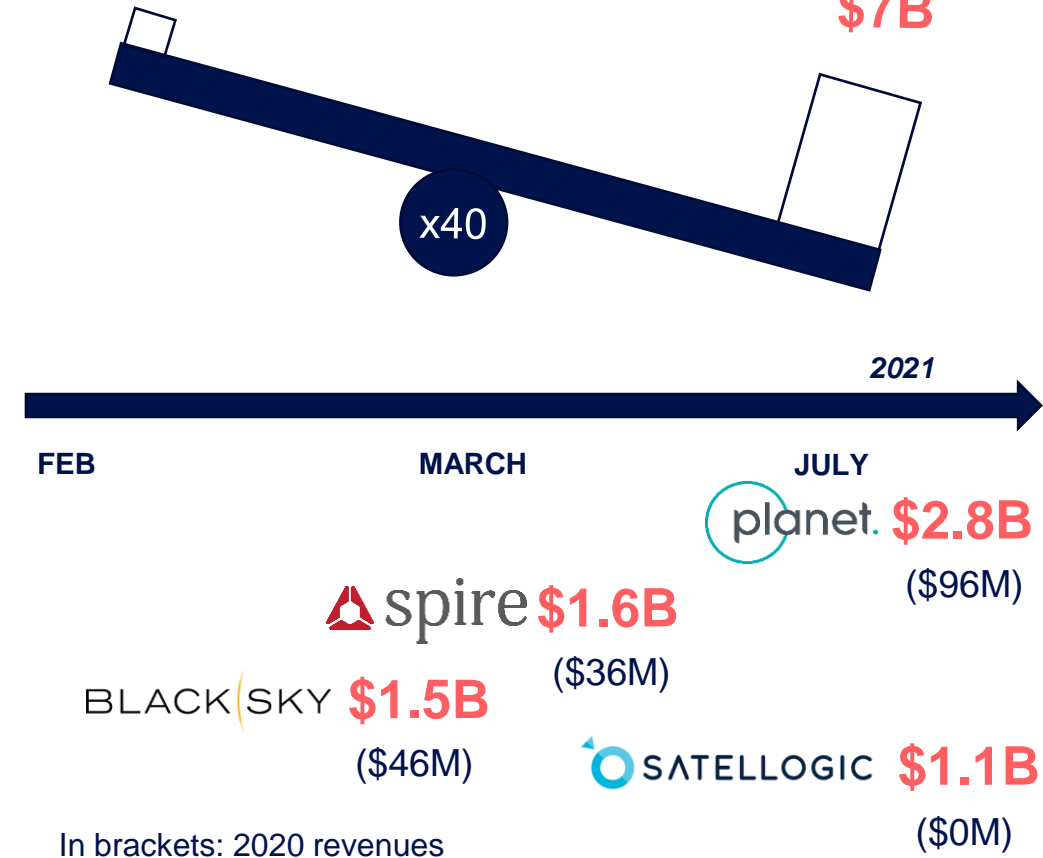
## ... THANKS NEW FINANCIAL VEHICLES

Combined annual revenues of targets

**\$178M**

Combined post SPAC valuation

**\$7B**



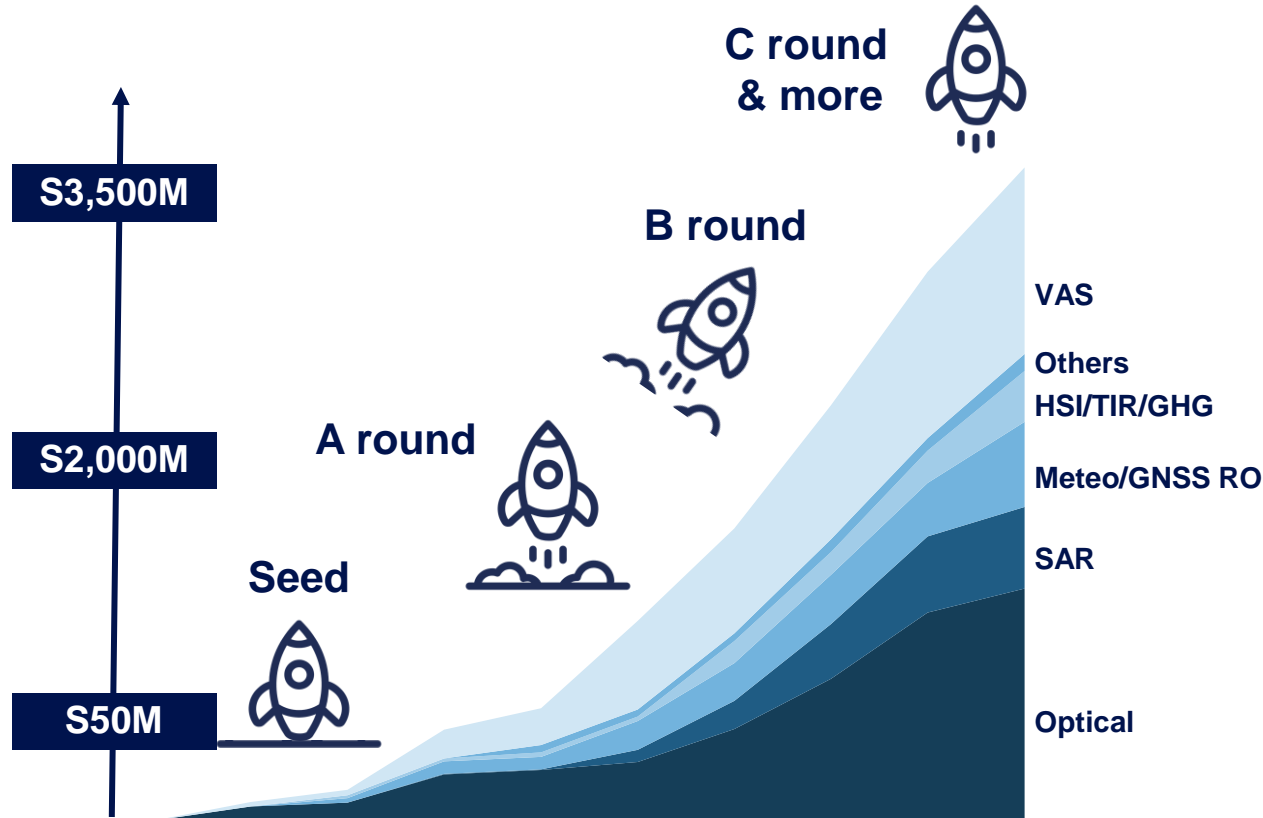
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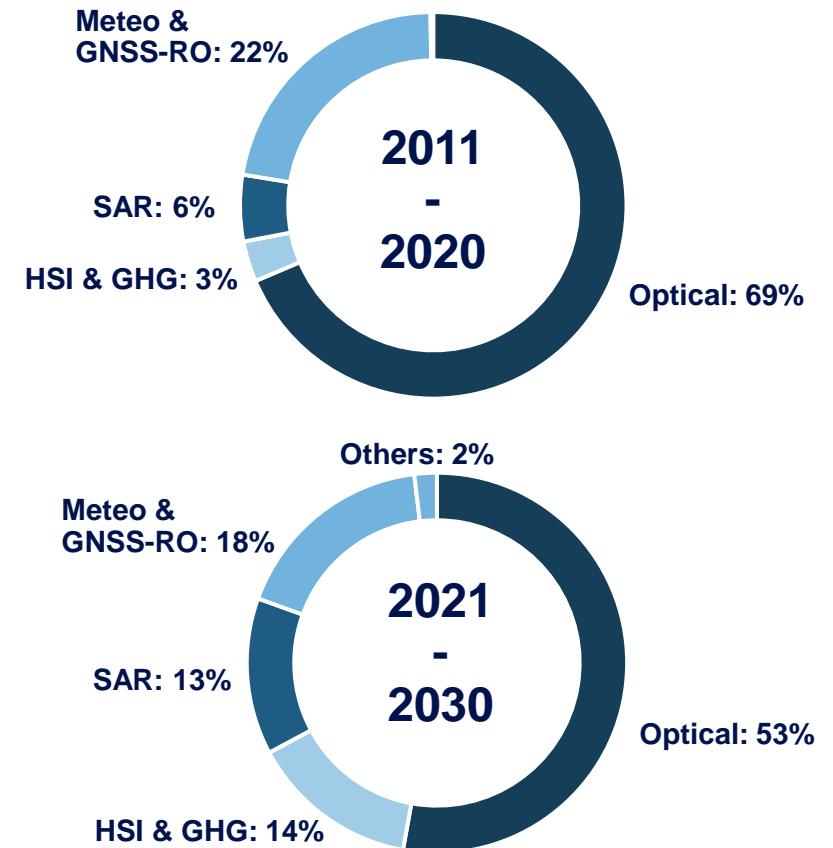


# PAYLOAD DIVERSIFICATION RAISING FUNDS...

## EO FUNDRAISING EVOLUTION (CUMULATIVE)



## MAIN PAYLOAD DISTRIBUTION OVER THE NEXT DECADE



Source: Euroconsult – Earth Observation Data & Services Market