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African Space Industry Report 2023

Key market insights and trend analysis of the African space and satellite industry

EXCERPT

5th Edition | August 2023

Developed by | Space in Africa

ABOUT THE AFRICAN SPACE AND SATELLITE INDUSTRY 2023 REPORT

What It Covers

The report provides data and analyses trends, projects, partnerships, investments, and deals within the African space ecosystem. It further delves into the significant players in the industry, the factors driving each segment, the demand for space technologies, innovations in space applications, potential business development opportunities, and the regulatory framework within the African space ecosystem.

Value Proposition

The fifth edition of our report builds upon the foundation laid by our four previous reports, leveraging our extensive multilevel data portal. This portal is a comprehensive repository for real-time and historical data dating back to the 1990s. The insights presented in this report are derived from our unparalleled access to data covering all segments of the industry and market data throughout the African space and satellite industry value chain.

This comprehensive resource offers a fresh perspective on the diverse segments and market dynamics within the African space and satellite ecosystem. It goes beyond conventional analysis by leveraging a wealth of data to provide unique insights. These insights are highly valuable for businesses looking to enhance their intelligence strategies, refine marketing approaches, identify collaboration opportunities, and make informed policy decisions. By combining historical data with real-time insights, this report empowers readers to make well-informed, forward-thinking choices in the dynamic African space and satellite industry.



African Space Industry Annual Report 2023

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The report includes annual access to real-time data on every industry segment (for Global License) and players via the new Space in Africa Data Portal and yearly access to premium content published on the Space in Africa News Website.

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Acronyms

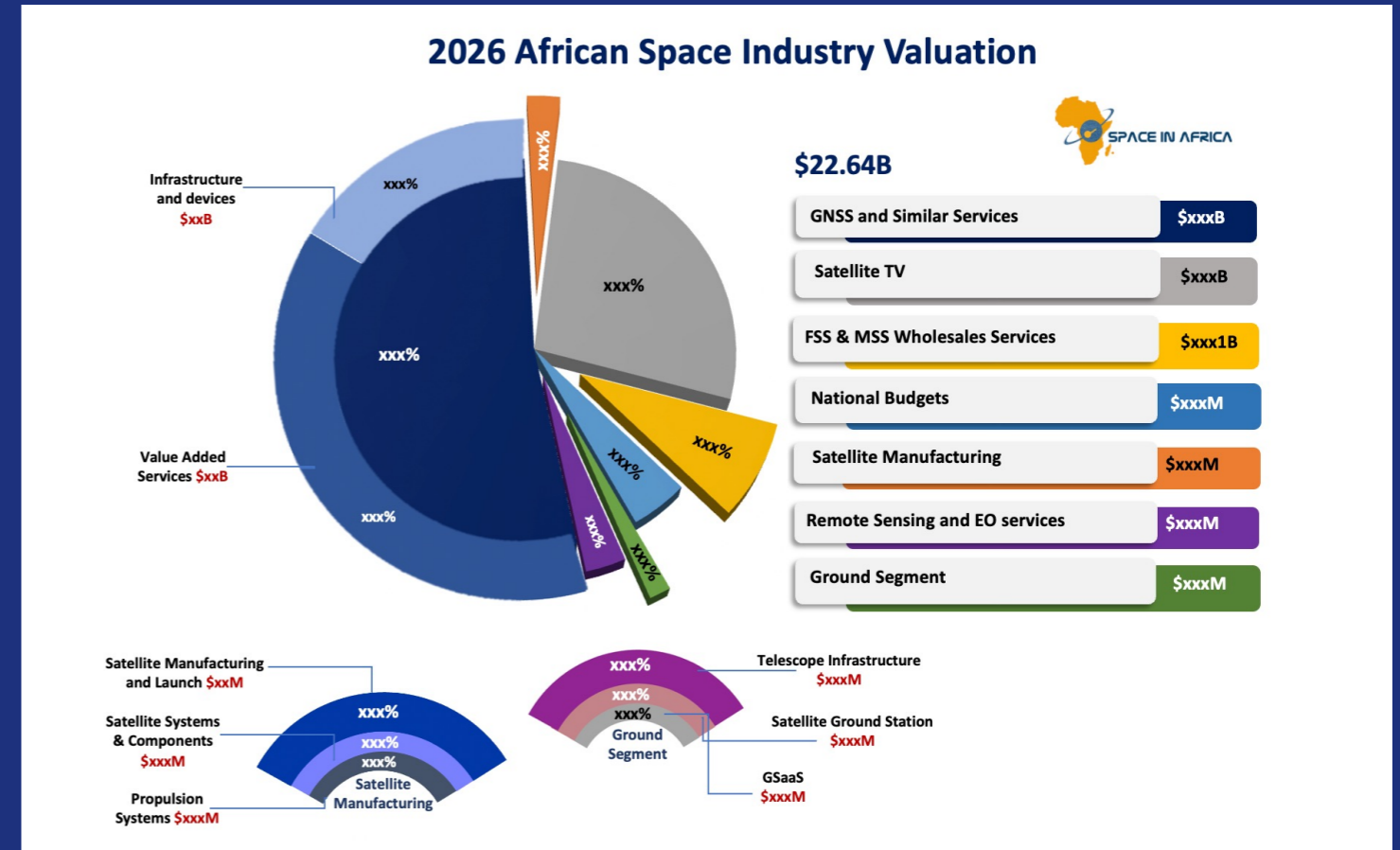
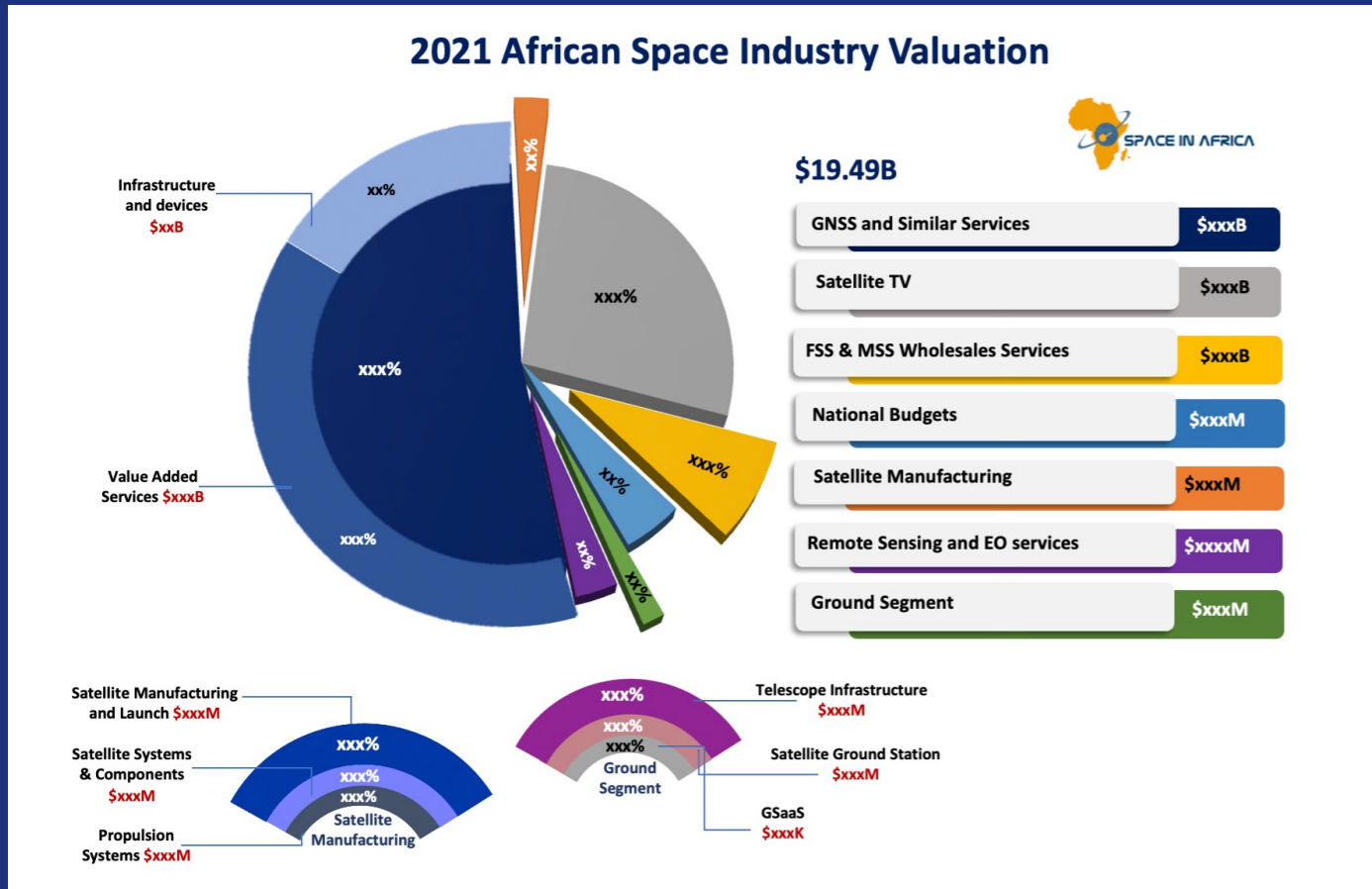
African Space Economy

The Current State of the African Space Industry Valuation

This chapter delves into the specific trends, developments, and factors driving these segments' growth. It also explores the key players, technologies, and innovations that have propelled these sectors forward. In addition, the chapter will examine the current state, prospects, opportunities and challenges across various segments, including satellite communications, satellite TV, Earth observation, satellite manufacturing, and GNSS services.

Is Africa on Track to Meet the 2026 Valuation?

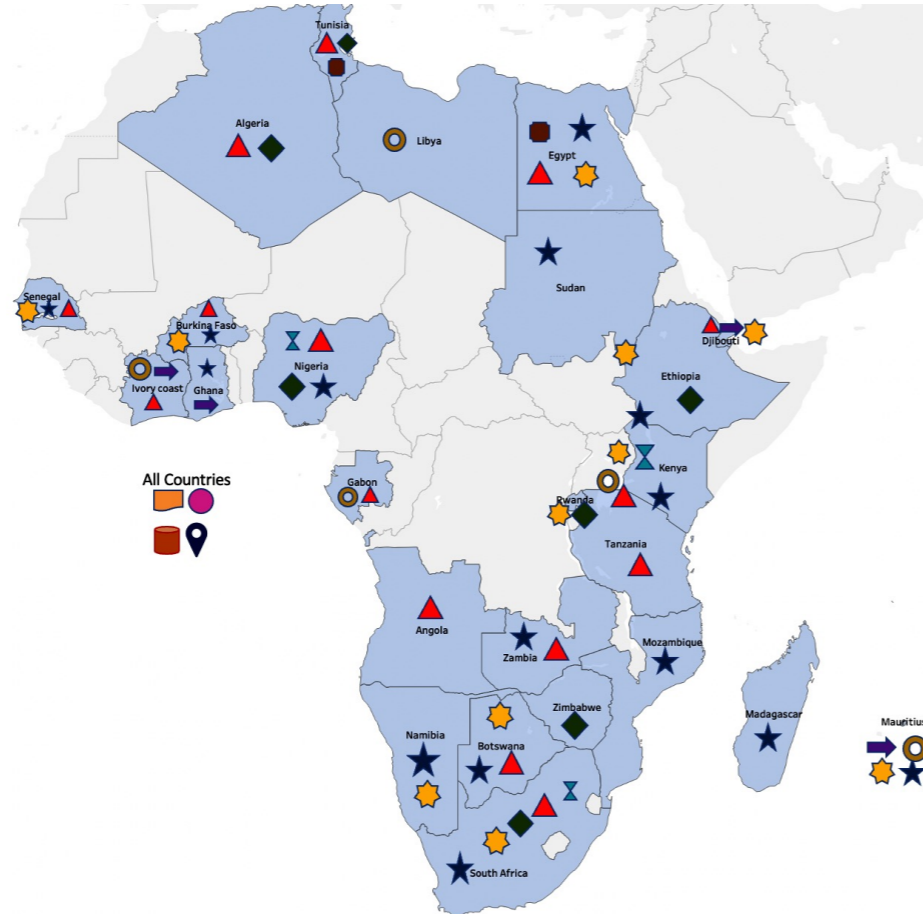
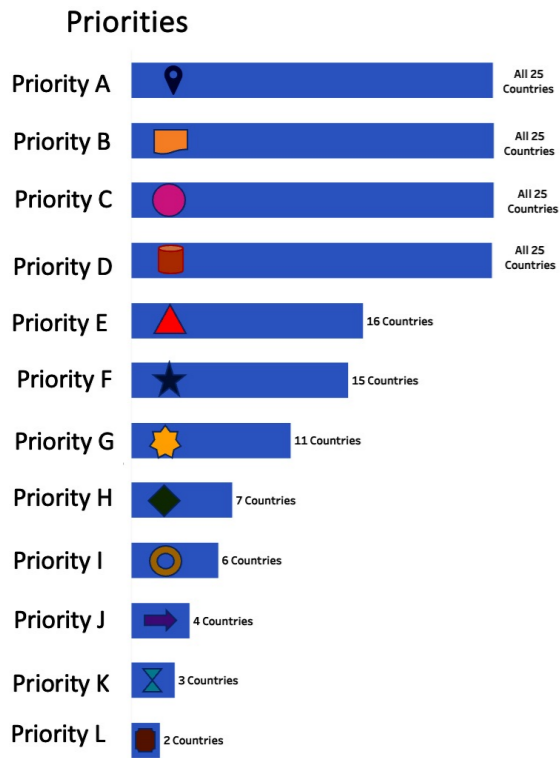
The chapter examines the implications of this consistent growth about the projected Compound Annual Growth Rate (CAGR) of 3.04% until 2026. Considering the various economic, technological, and regulatory factors, the chapter assesses how this aligns with the industry's positive trajectory and its potential to meet the ambitious valuation goal.



National Space Programmes

How Space Agencies are Formed in Africa

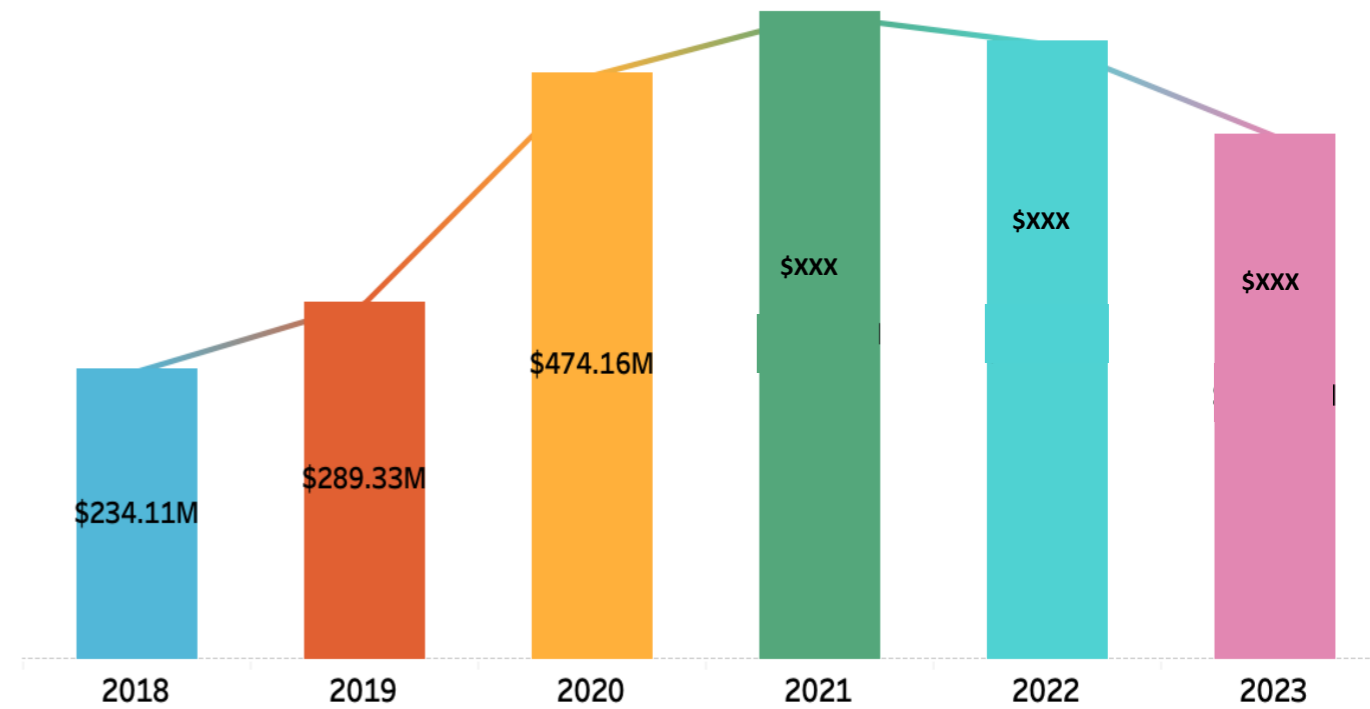
This chapter comprehensively examines the initiation processes behind space programmes in African countries. This scrutiny adds significance as more nations participate actively in the global space race. By delving into these initiation phases, this chapter equips readers with a deeper appreciation of how each nation's unique priorities translate into tangible investments and strategic approaches to nurturing and expanding their space capabilities. This nuanced understanding sheds light on the African landscape's evolving dynamics and offers valuable insights into the broader context of international space endeavours.



Space priorities of African countries in the next five years. Source: Space in Africa

2023 African Space Budget

This chapter discusses the financial commitments made by over 15 African countries in 2023. It also offers insights connecting these budgets with their priorities and the reasons behind individual spending decisions. Furthermore, the analysis compares the 2023 budget with budgets dating back to 2018, providing a comprehensive overview of the trends in financial expenditures across the continent.



National space budgets from 2018 to 2023. Source: Space in Africa

National Space Policy and Regulations

This chapter evaluates the space policies and relevant legislation, where applicable, of African states that are engaged in space activities. The primary objective is critically analysing the legislation promoting private sector involvement, market expansion, and capacity development within the African space industry. By examining the enabling legal framework, this assessment seeks to identify measures that foster a conducive environment for the growth of the private sector, improve bilateral and multilateral collaborations, and facilitate the overall advancement of the African space sector.

As-a-service Model in the African Space Ecosystem

This chapter delves into the dynamic landscape of the African space industry, shedding light on the growing prominence of the "as-a-service" model. It focuses on the key stakeholders, their influence, and the ongoing evolution of this model within the African context. Moreover, the chapter discusses the myriad opportunities for enhanced service offerings within three key segments: satellite data-as-a-service, satellite-as-a-service, and ground station-as-a-service. It explores how these segments are evolving, highlighting the potential for technological advancements, collaboration, and the creation of novel opportunities for space-related ventures throughout the continent.

African Space Collaboration and Agreements

This chapter provides a comprehensive overview of the pivotal role that collaboration has played in propelling the development of Africa's space sector from the year 2000 to Q1 2023. It delves into local and international collaborations, emphasising how these partnerships have been instrumental in leveraging resources, expertise, and infrastructure to achieve significant advancements in space-related initiatives.

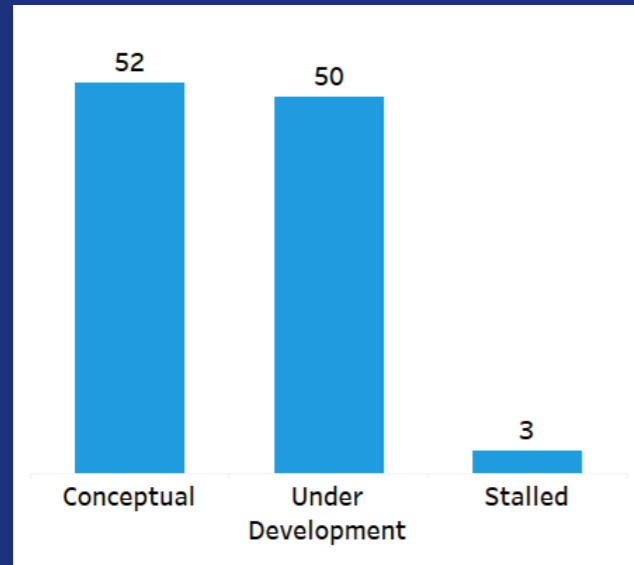
Africa's Space Infrastructure, Resources, and Investment Opportunities

This chapter comprehensively analyses the existing infrastructure and resources accessible to the African space industry. With a focus on potential opportunities, this section assesses the present condition of operational and proposed launch facilities, ground stations, astronomy equipment, GNSS infrastructures, and the continent's teleports. In addition, the section offers a comprehensive overview of the existing and planned infrastructure and resources within the African space industry, providing a clear understanding of their current state while identifying potential avenues for improvement and offering valuable insights into areas that require additional investments.

Satellite Manufacturing

In this chapter, an extensive examination is conducted of Africa's historical satellite initiatives. This analysis goes into intricate specifics, encompassing aspects such as the production expenses, the entities tasked with operating these satellites, the manufacturers engaged in their fabrication, the nature of their intended missions, the launch service providers responsible for deploying them, and the launch sites from which they were dispatched.

Furthermore, the chapter delves into forthcoming satellite projects, encompassing those currently in the developmental phase, those that have encountered delays or impediments, and those still at the nascent or conceptual stages of planning and design.

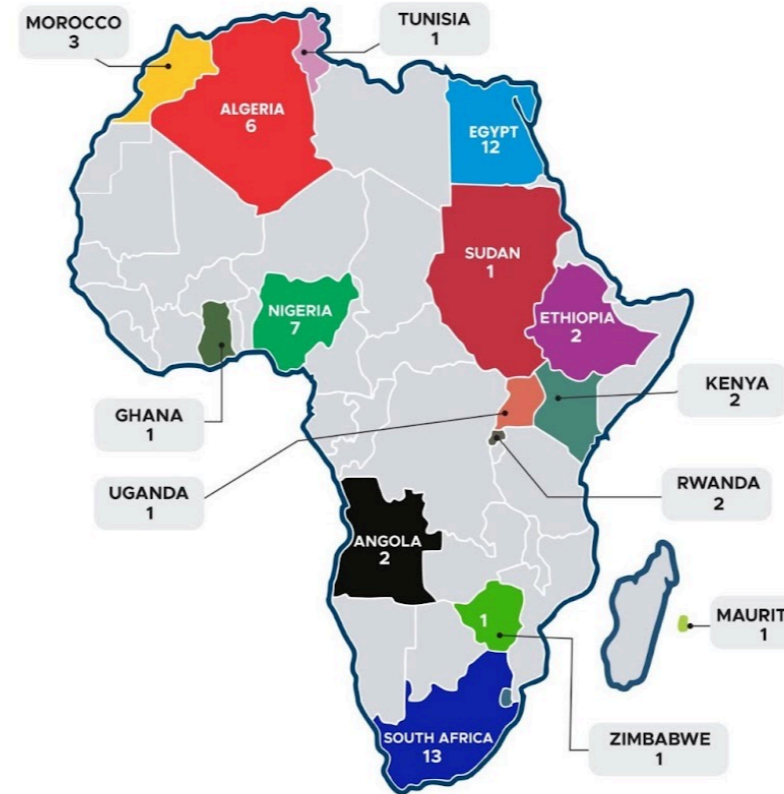


Status of future African satellites. Source: Space in Africa



AFRICA'S LAUNCHED SATELLITES

African countries have launched 58 satellites from 1998 until June 2023. 55 of these satellites were launched by 15 African countries, while the remaining 3 involved several African countries in a multilateral project.



- ALGERIA**
ALCOMSAT-1
ALSAT-1
ALSAT-1B
ALSAT-1N
ALSAT-2A
ALSAT-2B
- ANGOLA**
ANGOSAT-1
ANGOSAT-2
- EGYPT**
TIBA-1
EGYPTSAT-1
EGYPTSAT-2
EGYPTSAT-A
NARSSCUBE-1
NARSSCUBE-2
NILESAT 101
NILESAT 102
NILESAT 201
Nilesat-301
HORUS-1
HORUS-2
- ETHIOPIA**
ET-SMART-RSS
ETRSS-1
- MOROCCO**
MAROC-TUBSAT
MOHAMMED VI-A
MOHAMMED VI-B
- TUNISIA**
CHALLENGE ONE
- MULTILATERAL**
NEWDAWN
RASCOMSTAR QAF-1
RASCOMSTAR QAF-1R
- MAURITIUS**
MIR-SATI
- RWANDA**
RWASAT-1
ICYEREKEZO
- KENYA**
1KUNS-PF
TAIFA-1
- UGANDA**
PEARLAFRICASAT-1
- SUDAN**
SRSS-1
- ZIMBABWE**
ZIMSAT-1
- GHANA**
GHANASAT-1

Space in Africa is the authority on news, data and market analysis for the African space industry, visit our website www.spaceinafrica.com or email us at info@spaceinafrica.com.

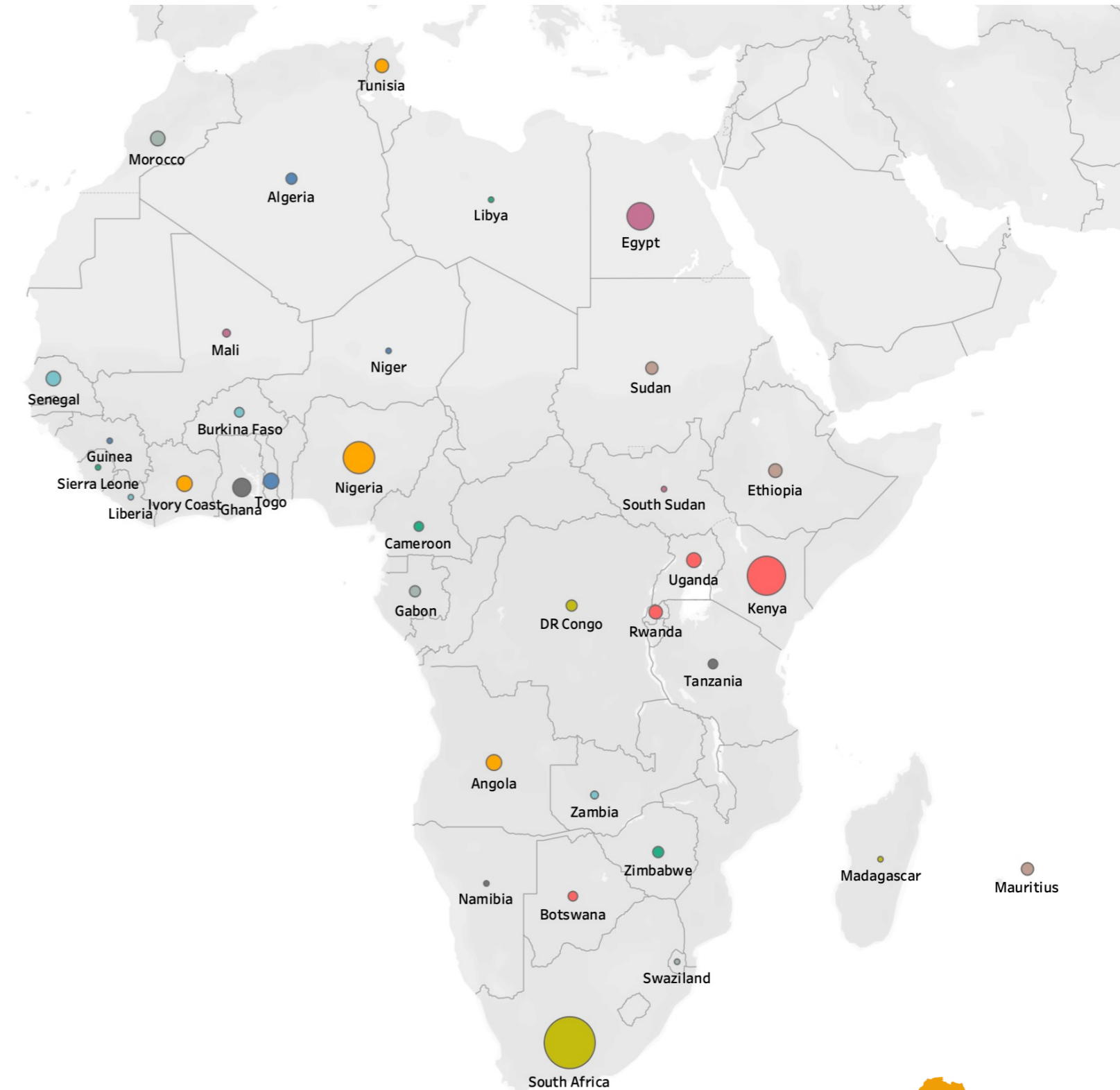
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NewSpace Industry

The chapter profiles 318 private and public companies in the African space industry. It offers insights into their size, ownership and leadership structure, workforce, financial history, business model, investment sources, products, and services. These companies span 31 African countries and encompass a variety of origins, including university research spin-offs, government-backed startups, and commercial ventures.

It also highlights significant developments in the sector, including the growing accessibility of financial resources from African and foreign sources and how it is helping them transform their business models, expand their market reach, and capitalise on emerging opportunities, fostering an inclusive and supportive environment for African NewSpace founders.



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