

IAF SPACE TRANSPORTATION SOLUTIONS AND INNOVATIONS SYMPOSIUM (D2)  
Small Launchers: Concepts and Operations (7)

Author: Ms. Carissa Christensen

Bryce Space and Technology, United States, carissa.christensen@brycetechnology.com

Mr. Nickolas Boensch

Bryce Space and Technology, United States, nick.boensch@brycetechnology.com

Mr. Phil Smith

Bryce Space and Technology, United States, phil.smith@brycetechnology.com

Ms. Jaclyn Wiley

Bryce Space and Technology, United States, jaclyn.wiley@brycetechnology.com

Ms. Elise Chenevey

Bryce Space and Technology, United States, elise.chenevey@brycetechnology.com

Mr. Manny Shar

Bryce Space and Technology, United Kingdom, manny.shar@brycetechnology.com

SMALLSATS BY THE NUMBERS 2021: GROWING SMALLSAT ACTIVITY AND ITS  
IMPLICATIONS FOR THE SMALL LAUNCH MARKET**Abstract**

Since 2012, smallsats (defined by the Federal Aviation Administration as satellites 600 kilograms and less) have garnered increased interest and are becoming more widely leveraged among space start-ups and traditional operators alike. The number of smallsats launched in 2020 reached 1,202, a historic high and twenty-three fold increase from 2012. Initial deployments of large smallsat telecommunications constellations are driving smallsat activity, resulting in over 900 spacecraft deployed in 2020 alone. These constellations are expected to continue to drive smallsat launch activity in the coming years. This paper places the expansive growth in smallsat activity into context and provides an overview of the smallsat market and its implications for small launch vehicles. The paper first highlights 2020 smallsat activity and presents contextual information on smallsat growth within the past 9 years. Next, the paper discusses key emerging trends in smallsat activity such as increasing smallsat mass, shifts in historical smallsat applications, growing participation from commercial smallsat operators, and the global proliferation of smallsats outside of the United States. The study then assesses the historical smallsat market share captured by small launch vehicles and medium-heavy launch vehicles, presents the value propositions and potential barriers associated with each vehicle category, and identifies emerging and future trends in smallsat operator preferences toward launch solutions. This analysis includes the increasing percentages of launches with smallsats, historical launch rates of smallsats on small and medium heavy vehicles, and launches dedicated to smallsats. Finally, the paper highlights several future areas to watch including business outcomes of smallsat ventures, SpaceX and OneWeb's initial deployment of their large communications constellations, and growing concerns about orbital debris stemming from smallsat activity.

The paper is based on an extensive set of publicly sourced data on satellite and launch activity, providing insight into worldwide trends. This paper seeks to aid and inform decision-making in industry, government, and academia by providing the space community with rigorous analyses of industry dynamics regarding smallsat deployments.