

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

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THE LIGHT LAUNCHER LANDSCAPE: A COMPILATION AND ASSESSMENT OF PUBLICLY
AVAILABLE DATA ON MARKET, COMPETITION AND FINANCING

Abstract

Light launch vehicles are currently a hot topic in the space transportation business. More than 60 light launcher development projects can be counted worldwide. Many seem to be still in a very preliminary phase of their development, though others have demonstrated substantial technology developments. Rocket Lab with its Electron launch vehicle is one of the few who already have successfully reached orbit. Common to most is the fact that these endeavors are exclusively or to a large degree privately funded. This paper will try to compile and assess publicly available data relevant to the light launcher market. First focus will be a short overview on the launch vehicle developments themselves. This is complemented by a high level view of the funding situation, or more specifically the inflow of investment capital. Last but not least, the market side is addressed. A first assessment focuses on the share of payloads compatible with light launchers within the global payload count. This is complemented by a compilation of market forecasts, evidencing the challenges and opportunities for light launchers.