

startup
radar
madri+d

Madrid Region


SpaceTech Startups

2022

 fundación para el
conocimiento
madri+d

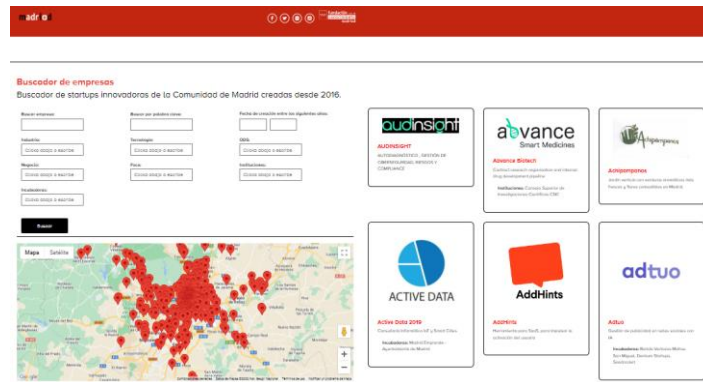
Industry
Report

In partnership with:

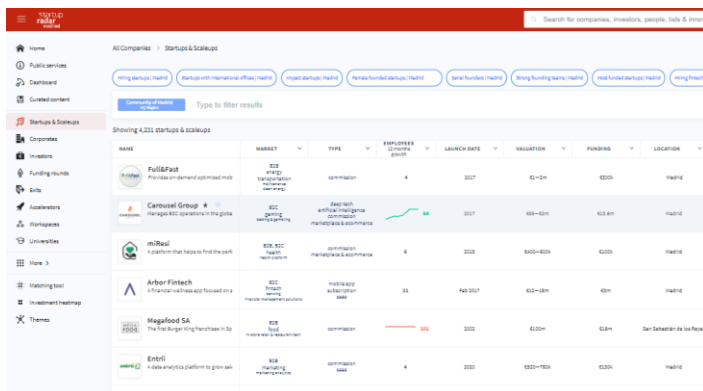
 **dealroom.co**

The Madrid Region Startup Ecosystem Platform

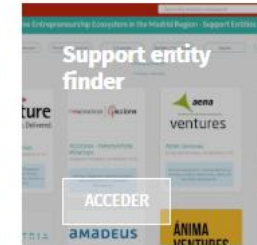
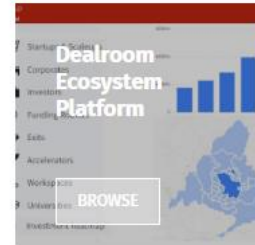
Ecosystem Platforms: Tools, Maps and Databases



Platform on Dealroom



Ecosystem Platforms



Reports

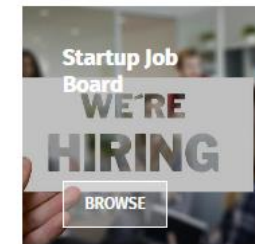


2 Annual reports:

- Ecosystem Report
- Investment Report

+ Industry Reports

Startup Tools



Tools for startups:

- Job search
- Investors
- Public Financing

Information sources

+ **Startup Radar madri+d:**

- Analysis of the innovative entrepreneurial ecosystem of the Community of Madrid.
- Unique databases in terms of size and representativeness of innovative startups, incubators, accelerators, incubators, venture capital,...

+ **European Space Tech lifting off.** ESA, Fondazione Amaldi y Dealroom.co

+ **StartUp Space Report 2022**, BryceTech

+ **“SPACE, The Dawn of a New Age” Report 2022**, Citi Group

+ **SpaceTech Across Europe 2022**, EBAN Network

+ **SpaceTech Industry Report 2021**, SpaceTech Analytics (STA) Agency

+ **The Startup Aerospace Company Landscape (part 1)**, Avascent Altimeter

+ **The Aerospace Startups Landscape (part 2)**, Avascent Altimeter

+ **Top 10 SpaceTech Trends & Innovations in 2022**, StartUS Insights

What is Space Tech?

UPSTREAM:

The segment encompasses companies operating in space or developing products for space: developing and/or operating satellites, launch vehicles, spacecraft payloads and components, innovative materials for use in space,...

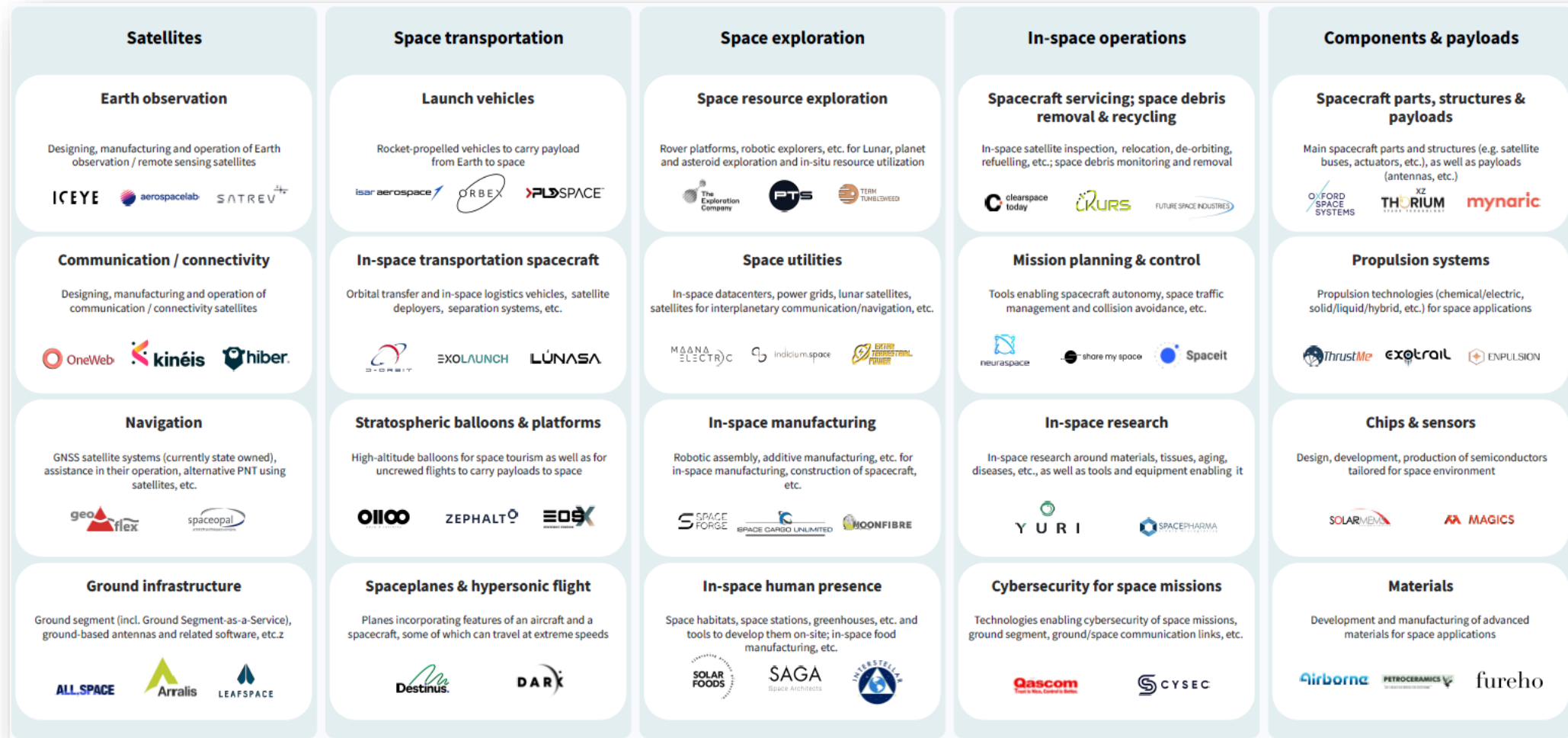
Some of the most innovative areas in this segment include technologies that can enable long-term human presence in space: space resource exploration and in-situ resource utilization, space utilities (in-space datacenters, power grids, etc.) and space habitats, as well as space tourism.

The segment also includes companies where space is not their core business. For example, 3D printing, advanced materials tech companies that target space among a number of other industries or those that have participated in space projects, or biotech companies that have sent experiments to space with the goal of exploring the potential use of their technology in space.

DOWNSTREAM:

This sector encompasses technologies derived from space for use on Earth (e.g. materials and sensors originally developed for space but having found use in Earth-based applications) as well as technologies used in space with the main goal of serving Earth-based applications (mainly satellites: Earth observation, communication, navigation). The segment also includes companies where space / space-derived tech is not their core tech.

European Space Tech overview - Upstream sector

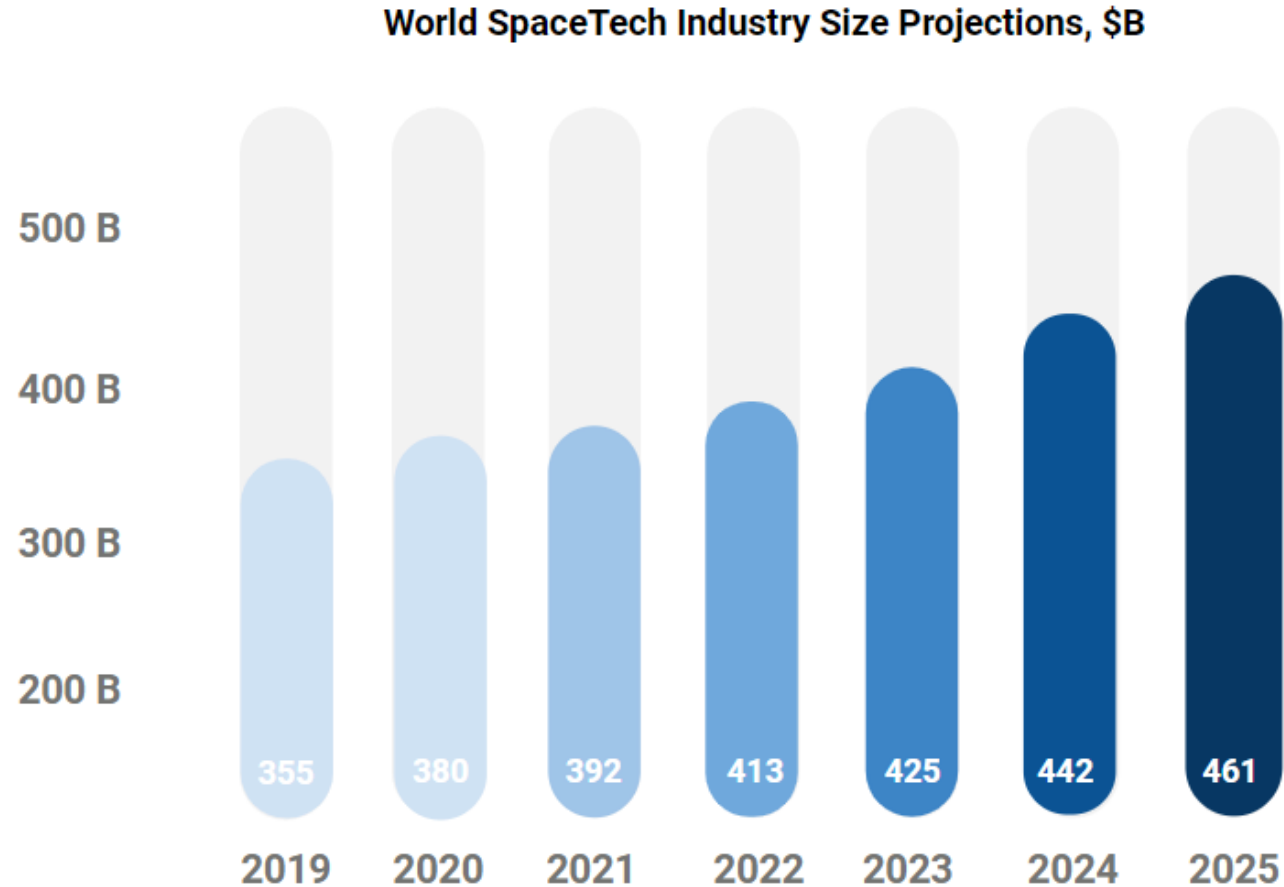


Source: European Space Tech lifting off. ESA, Fondazione Amaldi y Dealroom.co

Space Tech for Earth applications - the Downstream sector.

Agriculture & food <p>Satellite communications for data transmission, Earth observation for monitoring of soil moisture & weather forecasts, satellite navigation for asset tracking, in-space research for studying plant growth & biology</p> <p>GREENSPIN, weather, agrista, SPACECROP, WeatherSafe, BigTerra</p>	Aviation <p>Satellite services for air traffic management, airline operational communications & passenger in-flight connectivity, airport management & meteorology; urban air mobility; <i>reduction of environmental impact in aviation</i></p> <p>LILium, REFUSION, CONNECT ROBOTICS, AIRobot, SATAVIA</p>	Culture & entertainment <p>Satellite technologies for content apps (e.g. location tracking in photo apps, earth observation data for content creation), gaming (e.g. enhancing AR/VR experiences), sports (acquiring 3D navigational data), etc.</p> <p>Field, mOcean, Sekg, SnapPlanet, INSIGHTART</p>	Education <p>Satellite connectivity enabling access to online education around the world, including rural areas and developing countries.</p> <p>PRECEPTech, AMBASAT, Equilab, kitsat, robotify</p>	Energy <p>Space-based data for mapping and measuring wind, wave, tidal and solar resources; satellite communications, navigation and Earth observation for the hydrocarbon and nuclear sectors; in-space research to study heat transfer processes.</p> <p>energeo, Glint Solar, NERGIx, PowerMarket, aptech, SKYDRAFT</p>	Environment <p>Satellite technologies to monitor the essential climate variables, support in ocean conservation and restoration of land and forests, to assist companies in monitoring their environmental footprint & ESG compliance.</p> <p>OBROBOTTO, COLLECTIVE CRUNCH, pande, Falconers, TESSELO, kanop</p>	Finance <p>Satellite data for investment evaluation, risk assessment, event impact assessment, real-time asset/portfolio monitoring, carbon offsets auditing, etc.</p> <p>Kita, OXEQ, GEOVISUAL INSIGHT, DESCARTES, EKOFOlio, earthbank</p>
Health <p>Satellite tech for telemedicine & digital monitoring devices and for enabling the concept of One Health; research in microgravity (tissue engineering, cancer research, etc.) for health technology improvements</p> <p>Think Revolution, intelligent implants, ELECTROSPINNING, med2go, NaviBlind, qurox</p>	Maritime <p>Satellite technologies for maritime surveillance and safety/emergency response, transportation, all aspects of marine life and environment, aquatic-life monitoring, aquaculture & fisheries.</p> <p>FORSSEA, BLUE-THREAD, AutoNaut, bound4blue, WAKE, SURTEQ.io</p>	Materials, mining & manufacturing <p>Satellite tech for site monitoring and connectivity at industrial plants and mining/construction sites; the use of advanced materials developed for space in Earth applications; in-space research leading to new achievements in industrial tech.</p> <p>Owl Tech, TeraTech, INBOLT, AIRMEMS, NEURAL CONCEPT</p>	Mobility <p>Satellite navigation and connectivity for mobility and logistics and freight systems (e.g. for smart traffic management, goods tracking and connecting infrastructures)</p> <p>clickfeld, FERNRIIDE, sensolus, instant system, stratio, Social Changing</p>	Security & safety <p>Space-based services and satellite technologies for maritime surveillance, border control, disaster preparedness, emergency response, critical infrastructure management, secure communications, humanitarian operations, etc.</p> <p>SENHIVE, BLACKPIN, METASENDING, PRELIGENAS, EXXIRE, GLOBAL SMART DEVICE</p>	Smart cities <p>Satellite connectivity for grid management (waste management, etc.), navigation for transport information & traffic modelling, Earth observation for urban planning & urban agriculture, etc.</p> <p>ParkBee, CAPMO, KID DYNAMICS, airgloss, bimaging, klarn</p>	Tourism <p>Satellite technologies for intelligent routing and smart guides, up-to-date maps and weather reports, high-resolution imagery for 3D views & digital panoramas for marketing, data on tourist flows.</p> <p>TravelTime, triphobd, MOORINGO, esplorio, TaleTekk, Travelai</p>

Global Space Tech sector grows with a very favorable projection

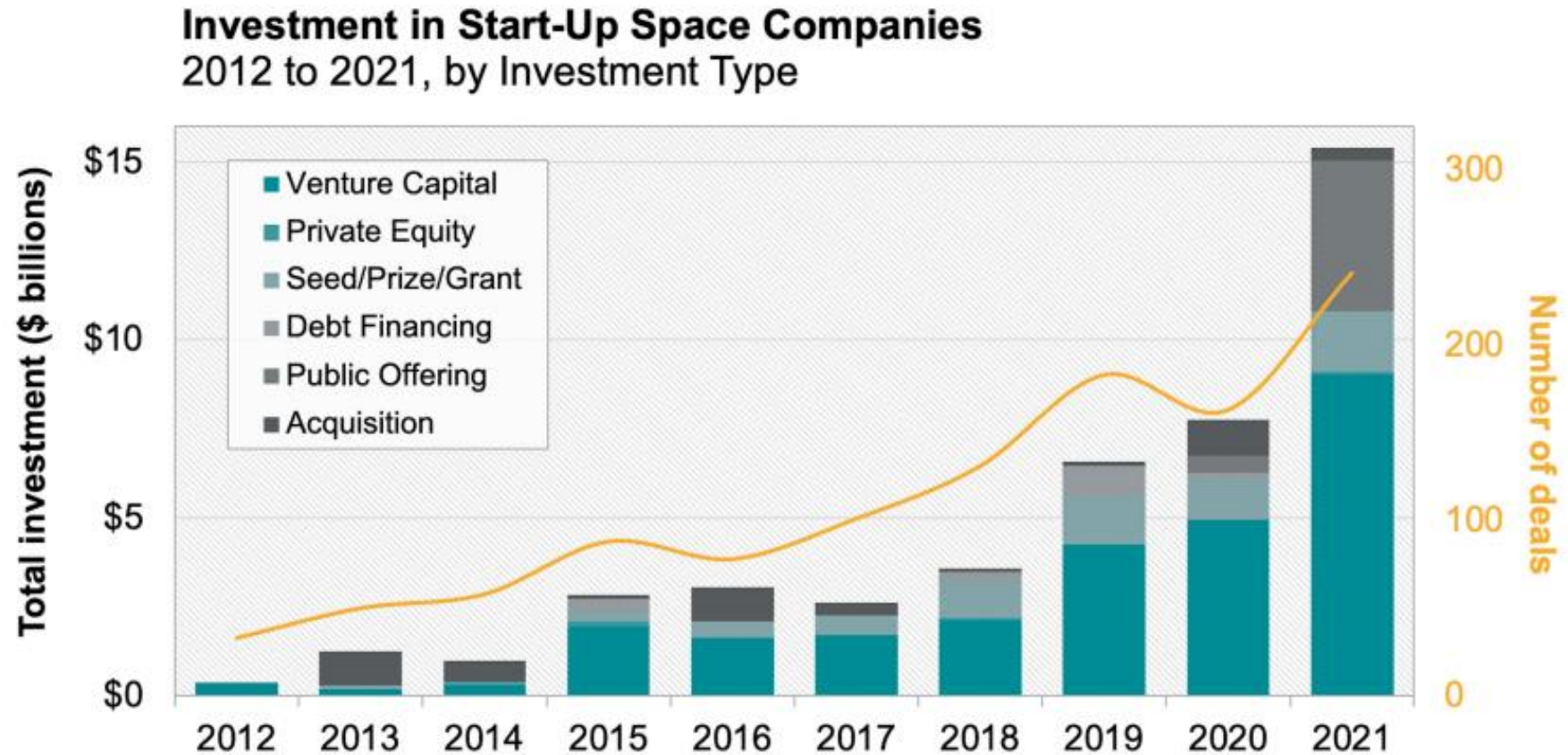


The Global SpaceTech Economy Projection

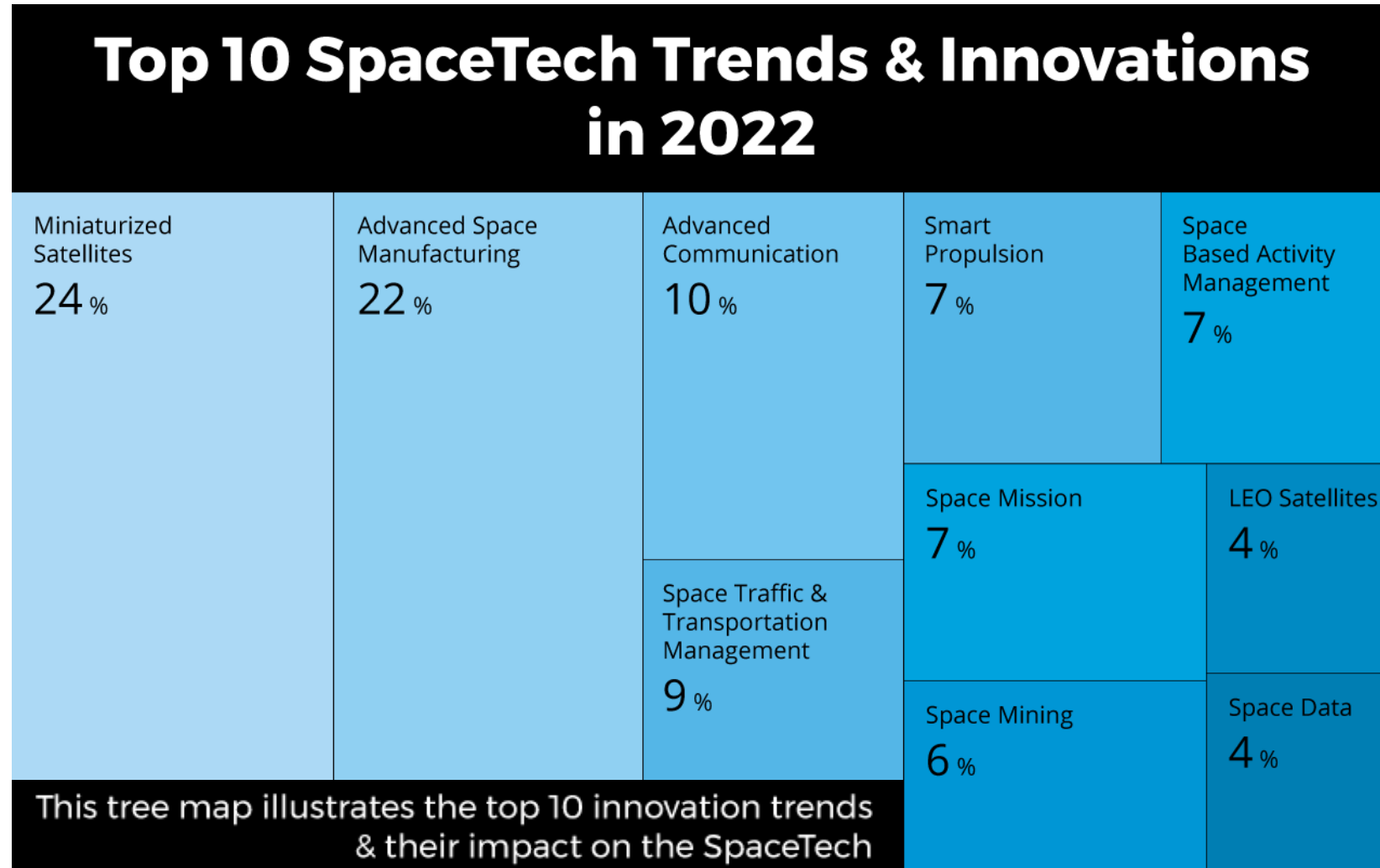
Source: SpaceTech Industry Report 2021, SpaceTech Analytics (STA) Agency

Global investment in Space Tech increases, and 2021 was extraordinary

Figure 1: \$15.4 billion invested in 2021 across 241 deals

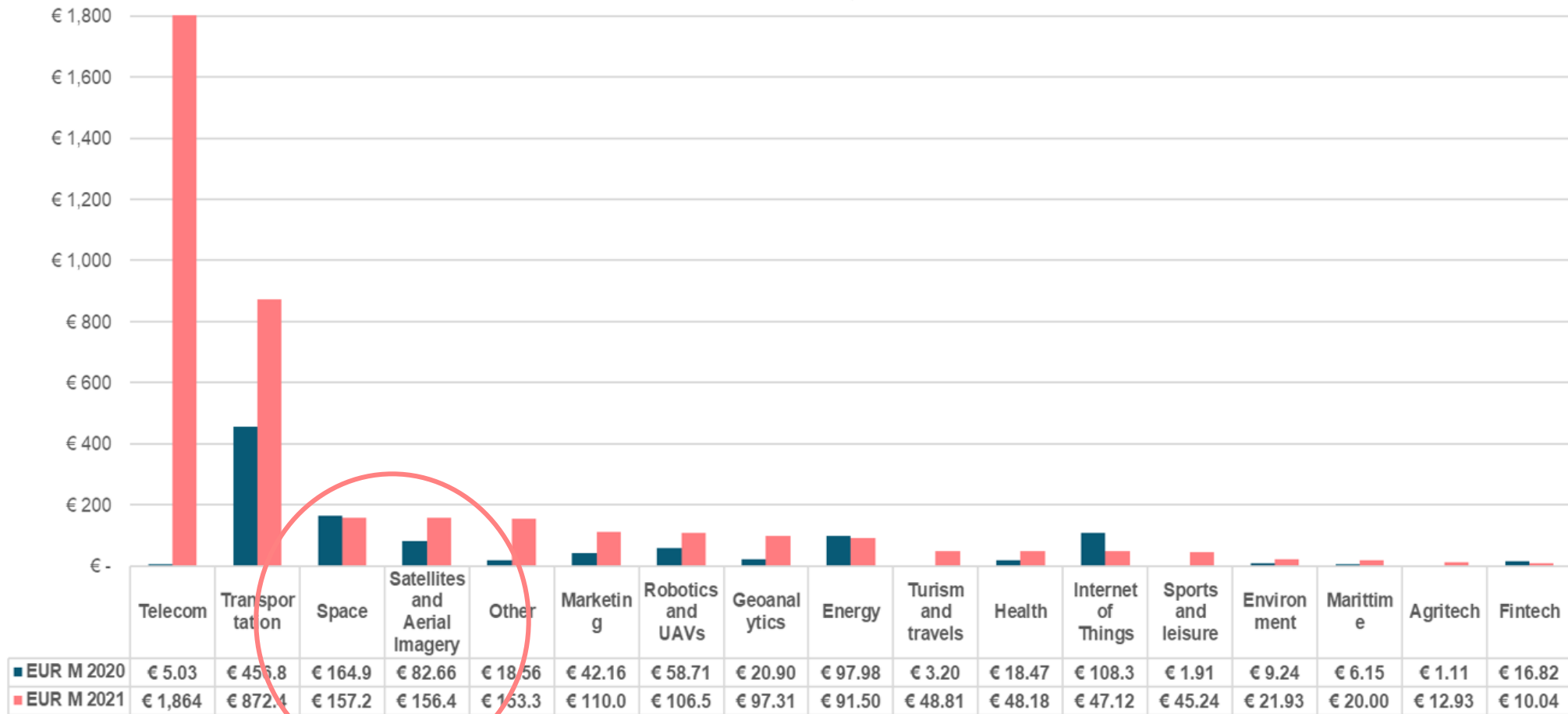


Several innovation trends stand out within the sector



Europe bets on Space Tech over other sectors

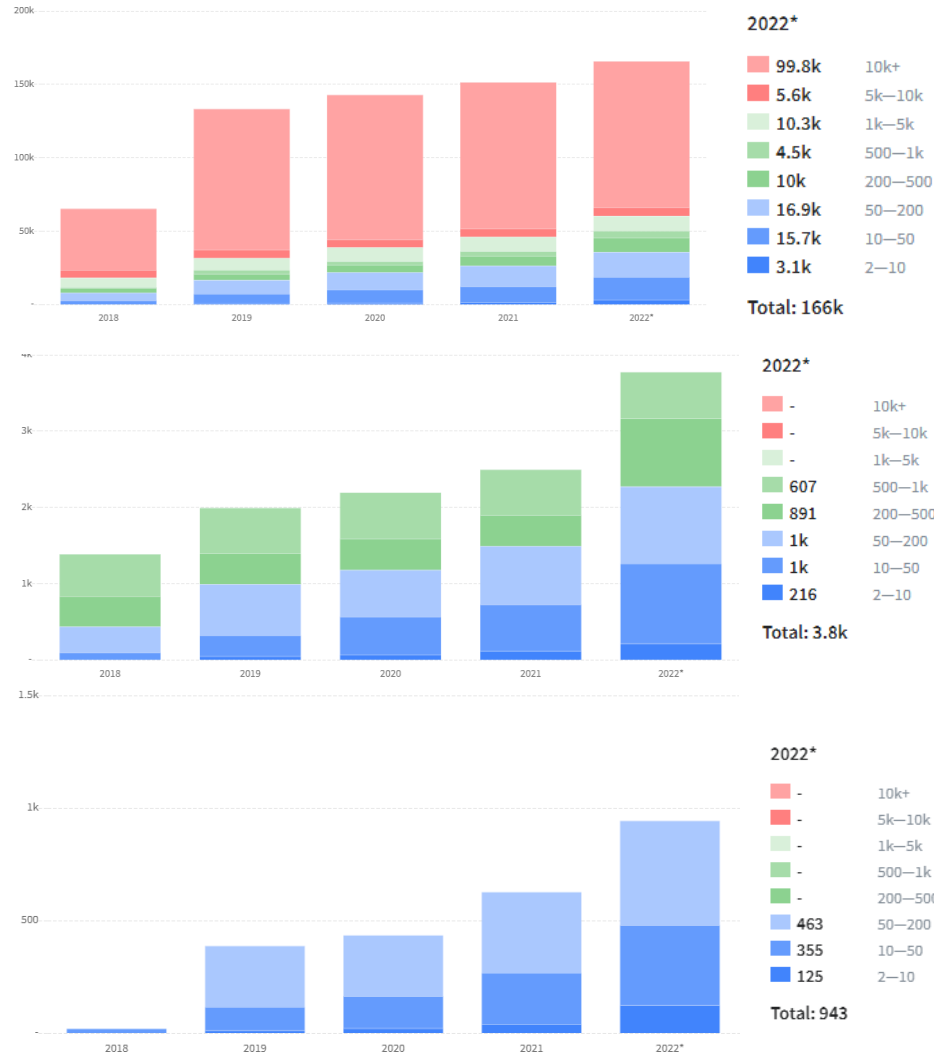
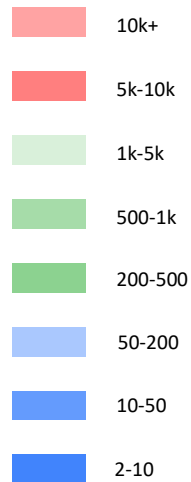
Amount Invested per Industry, 2020-2021, EUR M



Source: SpaceTech Across Europe 2022

Space Tech startups and Jobs created (2022)

Nr. of employees
by startup



🇪🇺 Europe

1703 startups

Jobs: 166 K

🇪🇸 Spain

129 startups (7,6% of Europe)

Jobs: 3,8k (2,3% of Europe)

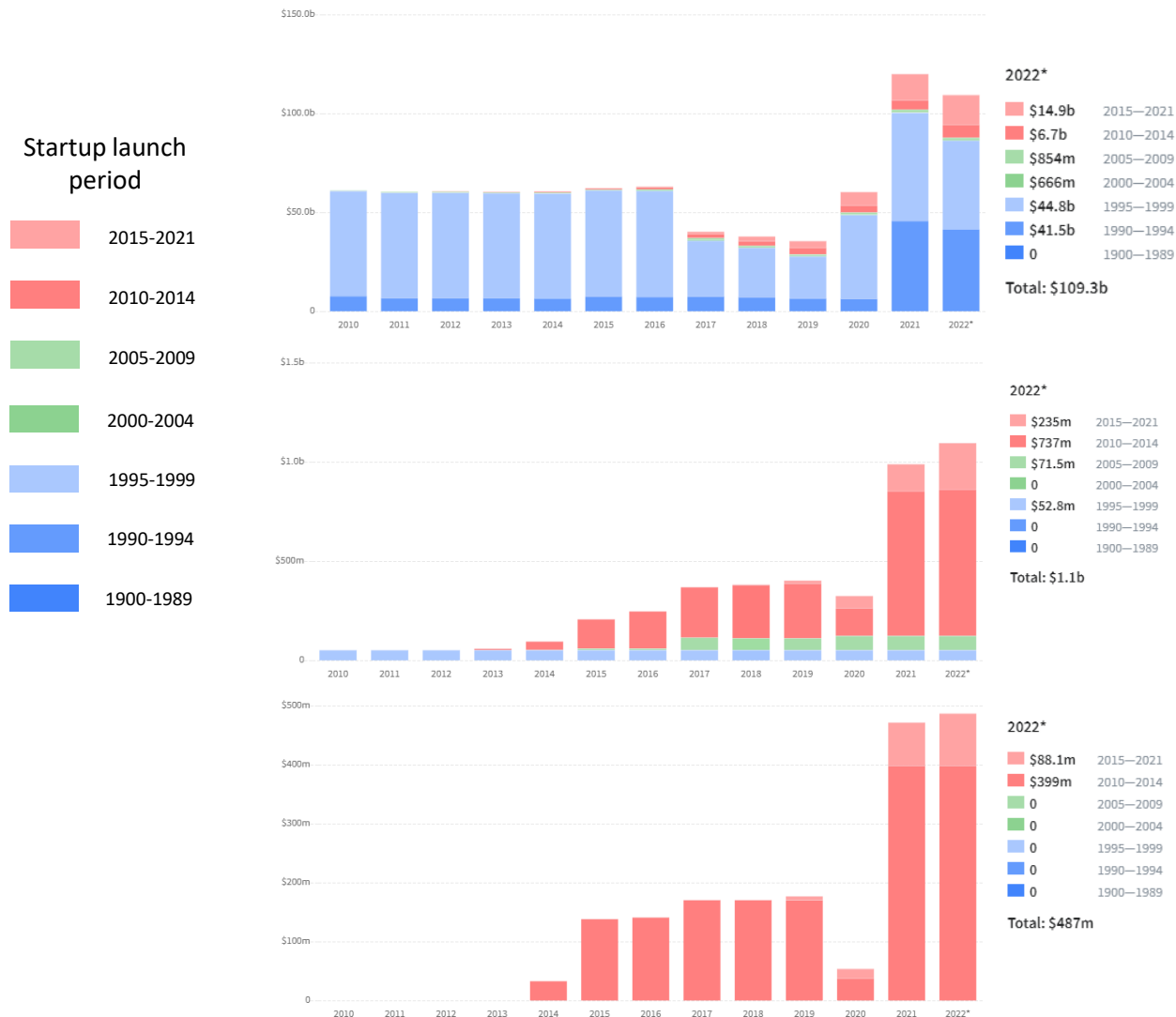
🇪🇸 Community of Madrid

62 startups (48% of Spain)

Jobs: 1K (26'3% of Spain)



Valoración total de las startups de SpaceTech (2022)



+ Europe

Value: 109.300 M\$

+ Spain

1100 M\$ (1% of european Space Tech value)

+ Community of Madrid

487 M\$ (44,3% of spanish Space Tech value)



enterprise software



transportation



robotics



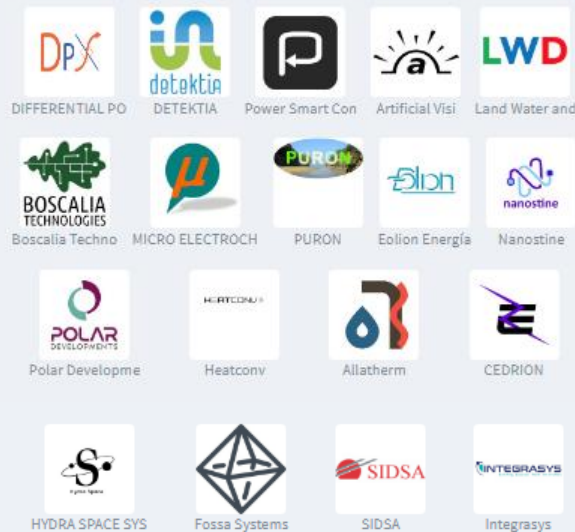
semiconductors



food



energy



travel



security



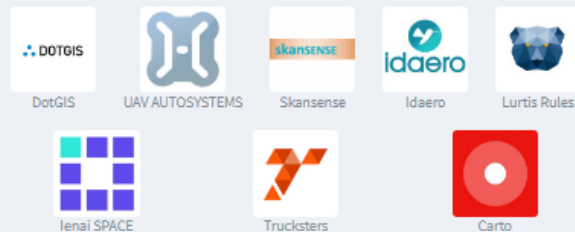
SPACE TECH STARTUPS IN THE COMMUNITY OF MADRID BY INDUSTRY

SPACE TECH STARTUPS IN THE COMMUNITY OF MADRID BY TECHNOLOGY

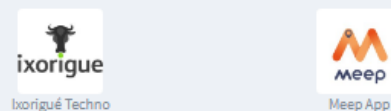
deep tech



artificial intelligence



mobile app



big data



3d technology



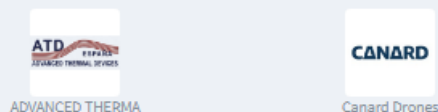
hardware



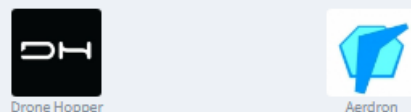
recognition technology



iot internetofthings



connected device



Source: 
[Landscape at Startup Radar madr+d](#)

Some conclusions about the sector in Europe

⊕ During the 2020-2021 period, the top countries contributing to ESA's budget were France (25.15%), Germany (20.7%), Italy (13.35%) and the United Kingdom (9.35%), followed by Spain (5.0%) and Belgium (4.95%). Germany, France, the United Kingdom and Spain are also the European countries with the largest ecosystems of companies and attractiveness for SpaceTech investors.

Source: [SpaceTech Across Europe 2022, EBAN Network](#)

⊕ Although the largest Spacetechnology companies originate in the US, European startups now account for a third of global spacetechnology funding. Not surprisingly, 260 SpaceTech startups have been created in Europe since 2019, a sector on the rise in the old continent.

Source: [Explore the SpaceTech Ecosystem, Dealroom](#)

Some conclusions about the sector in Spain

➤ Of particular note is the recent approval of the Spanish PERTE Aerospace, which plans to mobilize around 4,533 million euros between 2021 and 2025, with a public sector contribution of around 2,193 million to boost R&D&I in the aeronautics and space sector.

Source: [Ministry of Science and Innovation](#)

➤ In terms of employability, the aerospace industry currently generates a total of 155,261 jobs and represents 1.2% of national GDP and 5.4% of industrial GDP.

Source: [RRHH Digital](#)

The most complete and detailed picture of Madrid Region's tech ecosystem

KNOWLEDGE PARTNERS

Startup Radar database is kept up-to-date with the support of a growing number of Knowledge Partners

SPIN OFF DATA

- Madrid Region Universities
- R&D Institutions
- Science Parks & hospitals (ITEMAS Network)
- Technology Parks

INDUSTRIES & TECHNOLOGIES

Industries and Technologies knowledge Partners to date are referenced here:

<https://ecosystem.madrimasd.org/intro>

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