

GTAI Webinar

FROM ORBIT TO MARKET - MIDDLE EAST

The Space Sector in the UAE and Saudi Arabia

RIYADH, 08.07.2026

Lucie Käppner

Research Managerin (Riyadh, Saudi Arabia) at Germany Trade & Invest

www.gtai.com

A close-up photograph of a hand holding a silver pen, pointing at a document. The document features a checklist with several items, some of which are marked with red checkmarks. The background is blurred, showing what appears to be a desk or office environment.

Agenda

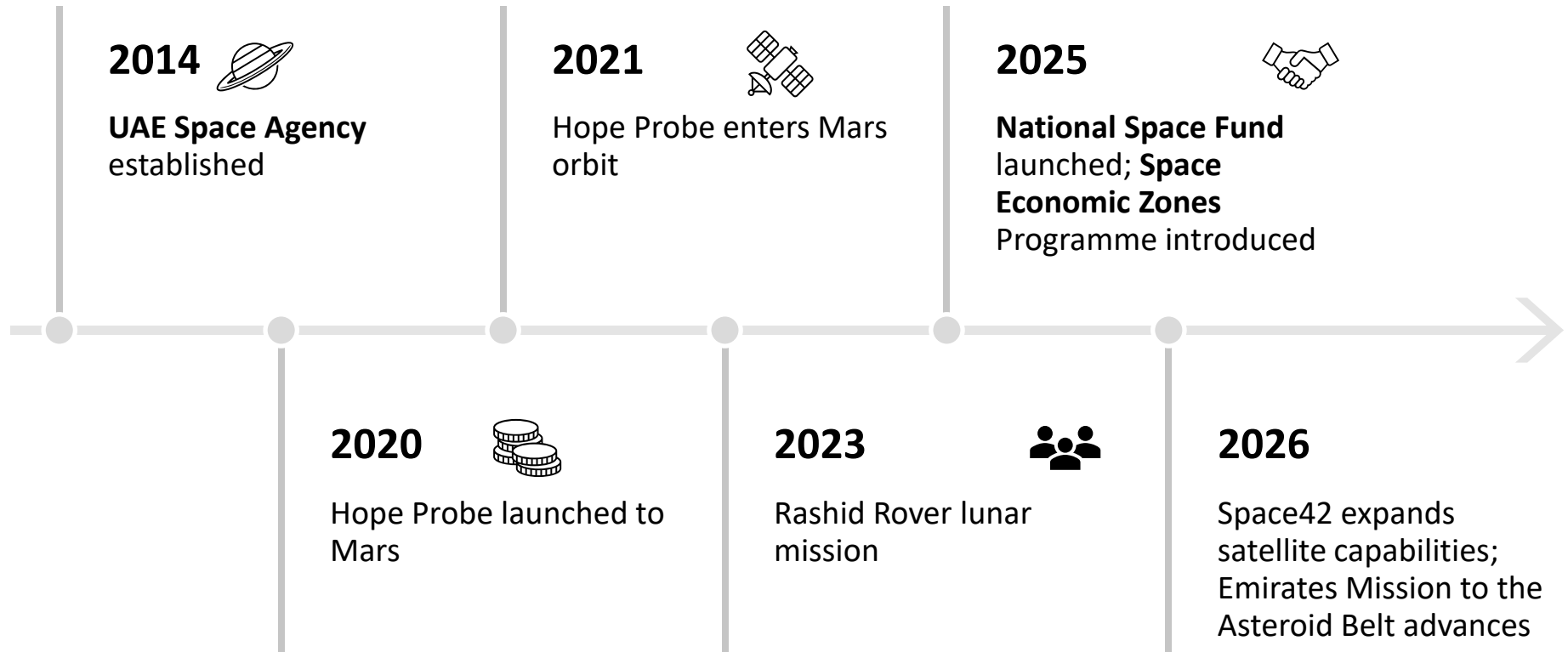
1. **UAE:** Market Overview
2. **KSA:** Market Overview
3. **Comparison UAE and KSA Market**

United Arab Emirates (UAE)

The region's most advanced space programme

MARKET DEVELOPMENTS, OPPORTUNITIES AND MARKET-
ENTRY CONSIDERATIONS

Recent Developments



Market Overview

UAE built up its capability step by step, and now runs **missions to Earth orbit, the Moon, Mars and the asteroid belt.**

Bought technology First DubaiSats, with South Korea	Built its own KhalifaSat, 2018	Serial production Up to 50 satellites a year (Orbitworks factory)
~ US\$5.5 bn Total space spending to date	50 satellites / year Satellite factory capacity (Orbitworks)	4 Astronauts (two have flown to the ISS)

Framework & strategy

Institutions

Federal space law (2019)

TDRA manages satellite frequencies & ground stations

UAE Space Agency

Regulator & investor. Founded 2014, Abu Dhabi.

MBRSC (Dubai)

Operator. Runs missions; builds satellites.

International: joined the Artemis Accords in 2020.

Strategy & policy

- › **National Space Strategy 2030:** six goals and dozens of programmes; in place since 2019.
- › **Part of industrial policy:** embedded in "Operation 300bn" and "Make it in the Emirates".
- › **Build local capability:** develop domestic industry and skills, not only import systems.

Partnerships

International partners

United States

NASA, Firefly (Gateway, landers)

France / Italy

CNES, Thales Alenia Space

Finland

ICEYE (radar EO satellites)

South Korea

Satrec (earlier EO satellites)

Japan

ispace (lunar-lander work)

German companies: barely involved to date, but UAE's demand areas map onto established German strengths:

Radar & Earth observation

Small satellites & parts

Ground systems & operations

Data services & analysis

Science instruments & robotics

Research & training links

Projects and Market Entry

Current projects

Mars: Hope

Orbiting Mars since 2021.

Moon: Rashid

Rashid 1 lost 2023; Rashid 2 planned in 2026.

Gateway airlock

Built & operate airlock module with NASA (2025 deal).

MBR Explorer

Asteroid-belt mission, expected in 2028.

Recent satellites

MBZ-SAT, Etihad-SAT, "813" (2025).

Astronauts

Two flown to the ISS; two more trained.

Entry options:

1 • Free-zone base

Allows full foreign ownership

2 • Licence

Space license required under the space law

3 • Local content

Challenges & risks

Strong competition from companies already in place

Local-content and hiring rules raise entry costs

Execution risk in ambitious timelines (Rashid 1, 2023)

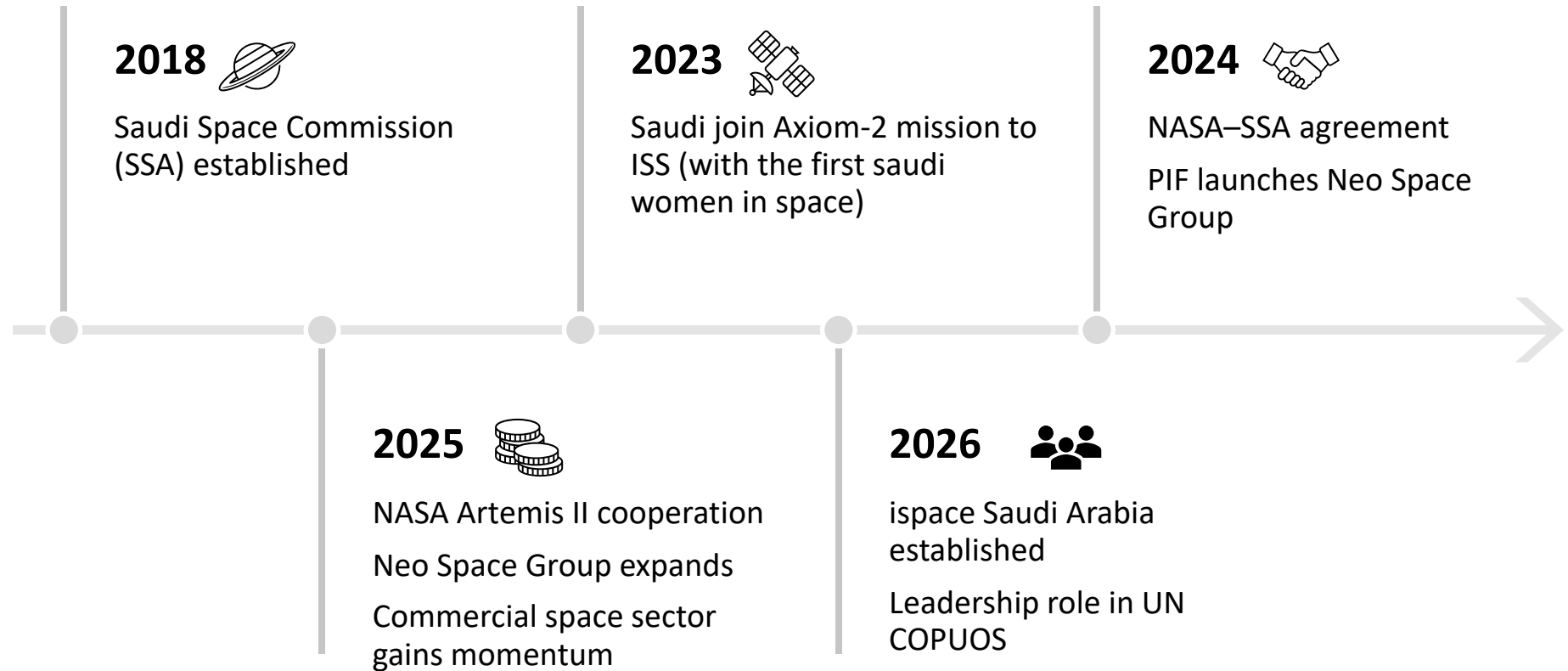
Dual-use export rules on sensitive technology

Saudi Arabia (KSA)

A young and growing market

MARKET DEVELOPMENTS, OPPORTUNITIES AND MARKET-
ENTRY CONSIDERATIONS

Recent Developments



Market Overview

Under Vision 2030 the space sector has moved from early milestone to fast growth.

First flight

First Arab in space, 1985

Institutions built

Space Agency founded, 2018

Fast growth

Accelerating since 2023 (esp. under Vision 2030)

US\$ 8.7 → US\$ 31.6 bn

Total Space market 2024 → 2035

~12% / year

Growth (world average ~9%)

US\$ 1.9 → 5.6 bn

Commercial space market 2024 → 2035

Framework & strategy

Supreme Space Council (2022)
chaired by the Crown Prince

Saudi Space Agency (2018)
Strategy, human spaceflight

CST: regulator

Licences, frequencies, orbits;
publishes market data.

KACST: research

Main research centre

Strategy & policy

- › **Part of Vision 2030:** diversify the economy, build technology, create jobs.
- › **State-led:** funded and directed by the state; local capability through partners.

Partnerships

International partners

United States

Artemis Accords (2022), NASA civil-space deal (2024); satellite on Artemis II.

Europe

Works with Thales Alenia Space, OneWeb and Eutelsat.

In discussion

Talks with Chinese, Indian and US firms, incl. SpaceX.

German companies: barely involved to date but entry options with technologies like:

Radar & Earth observation

Ground stations & operations

Satellite structures & parts

Data & analysis services

Test & assembly equipment

Research & training links

Projects and market entry

Current projects

Astronaut missions (2023)

First Arab woman in space; two to the ISS.

SaudiSat series

KACST Earth-observation line since 2004.

Joint CubeSat

2023, with KAUST and Spire Global.

Artemis II

Small satellite planned on NASA's mission.

Entry options:

1 · Regional presence

Usually needed for public contracts and tenders

2 · Local partner

3 · CST licence

needs time for approvals

Challenges & risks

Young, mostly state-funded market; private demand still forming

Approvals (licences, frequencies) are still slow

No local launch and little local manufacturing

Dual-use export rules on sensitive technology

UAE vs. Saudi Arabia

United Arab Emirates	Saudi Arabia
Expanding Ecosystem	Building Ecosystem
Public-private model	Government-driven
Commercialisation	Localisation
Manufacturing established (Orbitworks; radar-satellite factory)	Manufacturing just starting
Mature regional Hub (about 10 years of mission)	Emerging market, growing fast
More accessible, more competition	Higher growth, higher risk

UAE has settled rules and a manufacturing base, while Saudi Arabia is at earlier stage but growing faster. Both rely heavily on state funding and on foreign partners.

References & Sources – UAE

- **National Space Strategy 2030 (u.ae):** [National Space Strategy 2030 | The Official Platform of the UAE Government](#)
- **UAE charts new frontiers in space with landmark 2025 achievements (Gulf News):** [UAE charts new frontiers in space with landmark 2025 achievements](#)
- **Foresight SAR, "813" satellite (Zawya):** [UAE advances space ambitions with major milestones in 2025](#)
- **Orbitworks — sovereign satellite manufacturing (Arab News):** [UAE enters space manufacturing era with Orbitworks' sovereign capability | Arab News](#)
- **National Space Strategy 2030 (u.ae):** [National Space Strategy 2030 | The Official Platform of the UAE Government](#)
- **UAE record space year 2025 (Arabian Business):** [UAE CABINET | Home](#)
- **Cabinet approves National Space Strategy 2030 (UAE Cabinet):** [UAE space sector achieves record year with lunar, asteroid and satellite breakthroughs - Arabian Business: Latest News on the Middle East, Real Estate, Finance, and More](#)
- **Orbitworks:** [UAE launches first homegrown satellite and plans to sell it to the West - Orbitworks](#)
- **UAE space regulation: Space Law, TDRA (u.ae)** [Space regulation | The Official Platform of the UAE Government](#)

References & Sources – Saudi Arabia

- CST Space Market Report 2025 (CST): [Space Sector](#)
- Saudi space economy (Arab News): [Saudi Arabia eyes \\$31.6bn space economy as sector gains momentum | Arab News](#)
- Rapid expansion of the Saudi space economy (Economy Middle East): [Rapid expansion of Saudi space economy to reach \\$31.6 billion by 2035: Report](#)
- PIF launches Neo Space Group (Saudi Press Agency): [PIF Launches Neo Space Group to Boost Saudi Arabia's Satellite and Space Industries](#)
- Middle East space — NSG, Space42, Orbitworks (Satellite Today): [Global Influence: The Middle East is Rewriting What it Can Do in Space - Via Satellite](#)
- Space as a pillar of the knowledge economy (Arab News): [Saudi Arabia positions space sector as pillar of knowledge economy | Arab News](#)
- Saudi Space Agency KACST, SaudiSat, framework (Vision2030.ai): [Saudi Space Agency | Satellite Programme, Astronaut Missions](#)
- Invest Saudi: [Invest Saudi - Your Gateway to Investment Opportunities in Saudi Arabia](#)
- AHK Saudi-Arabien

Support on the ground

Germany Trade & Invest (GTAI): Market information

<https://www.gtai.de/de/trade/vereinigte-arabische-emirate-wirtschaft>

<https://www.gtai.de/de/trade/saudi-arabien-wirtschaft>

German chambers of commerce: Market entry

AHK VAE & AHK Saudi Arabia

<https://vae.ahk.de/de>

<https://saudiarabien.ahk.de/de>



Trade Fairs

UAE

- Dubai Airshow
- SATExpo Middle East
- Global Space Congress

KSA

- World Defense Show
- Space Debris Conference
- SADEX

For more information:
Get in contact:
Lucie.kaeppner@gtai.de
Gtai.de