PLDSPACE

The Launcher Company



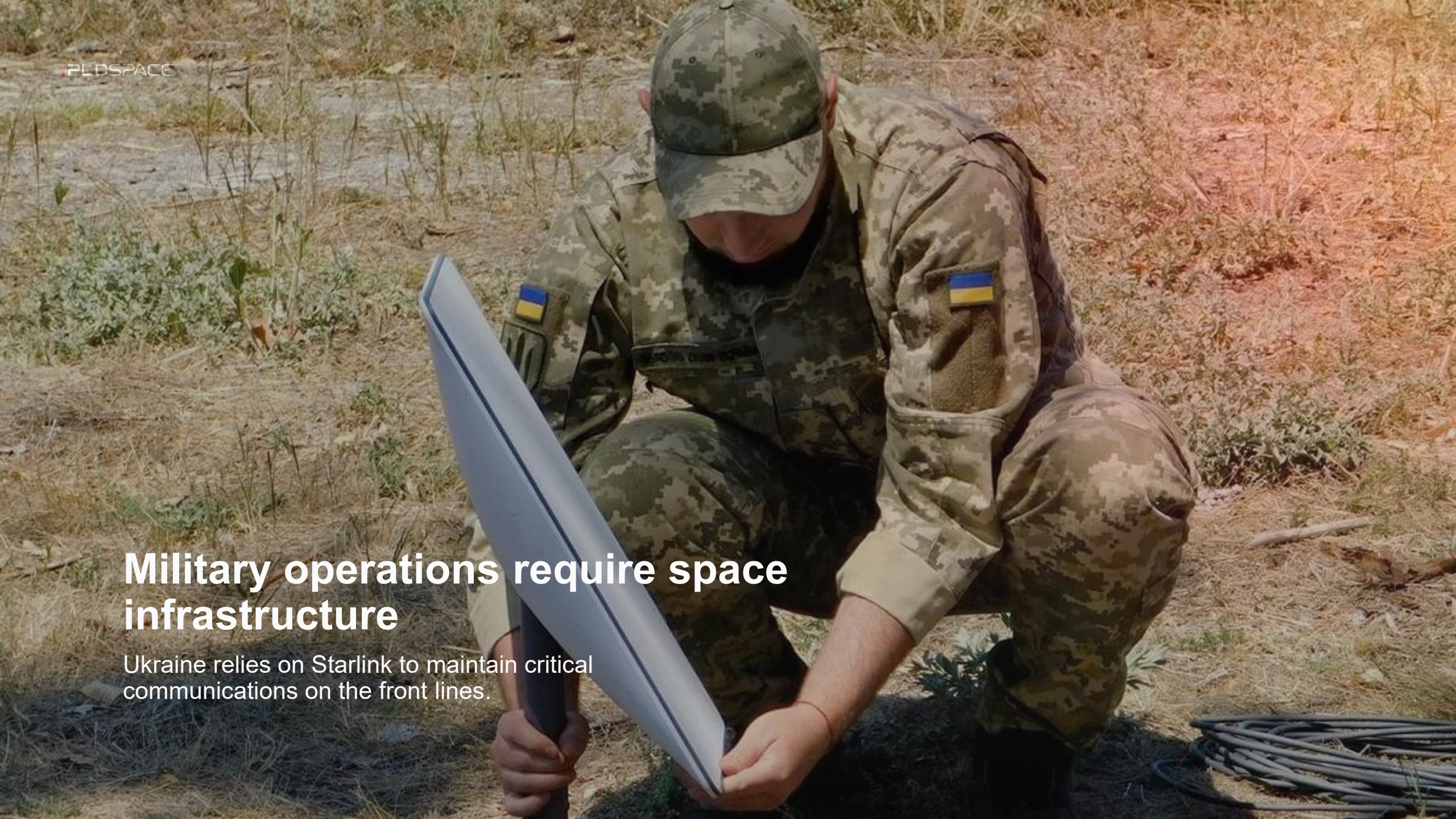
Fundación Conexus

04/11/2026



Space is an integral part of our daily lives

We use an average of 22 satellites every day, highlighting our enormous daily dependence on space-based services.



Military operations require space infrastructure

Ukraine relies on Starlink to maintain critical communications on the front lines.

Space is open for business

The global space economy is booming, with annual growth of around 10% projected through 2035*.

2025

$686 Billion

2035

$1,8 Trillion



*Space Foundation (2026), The State of the Global Space Economy; World Economic Forum y McKinsey & Company (2024), Space: The $1.8 Trillion Opportunity for Global Economic Growth.

Constellations in LEO have rewritten demand

Over 60,000 satellites planned. Fewer than 12,000 in orbit. Short lifetimes (4-7 years) create recurring launch demand.

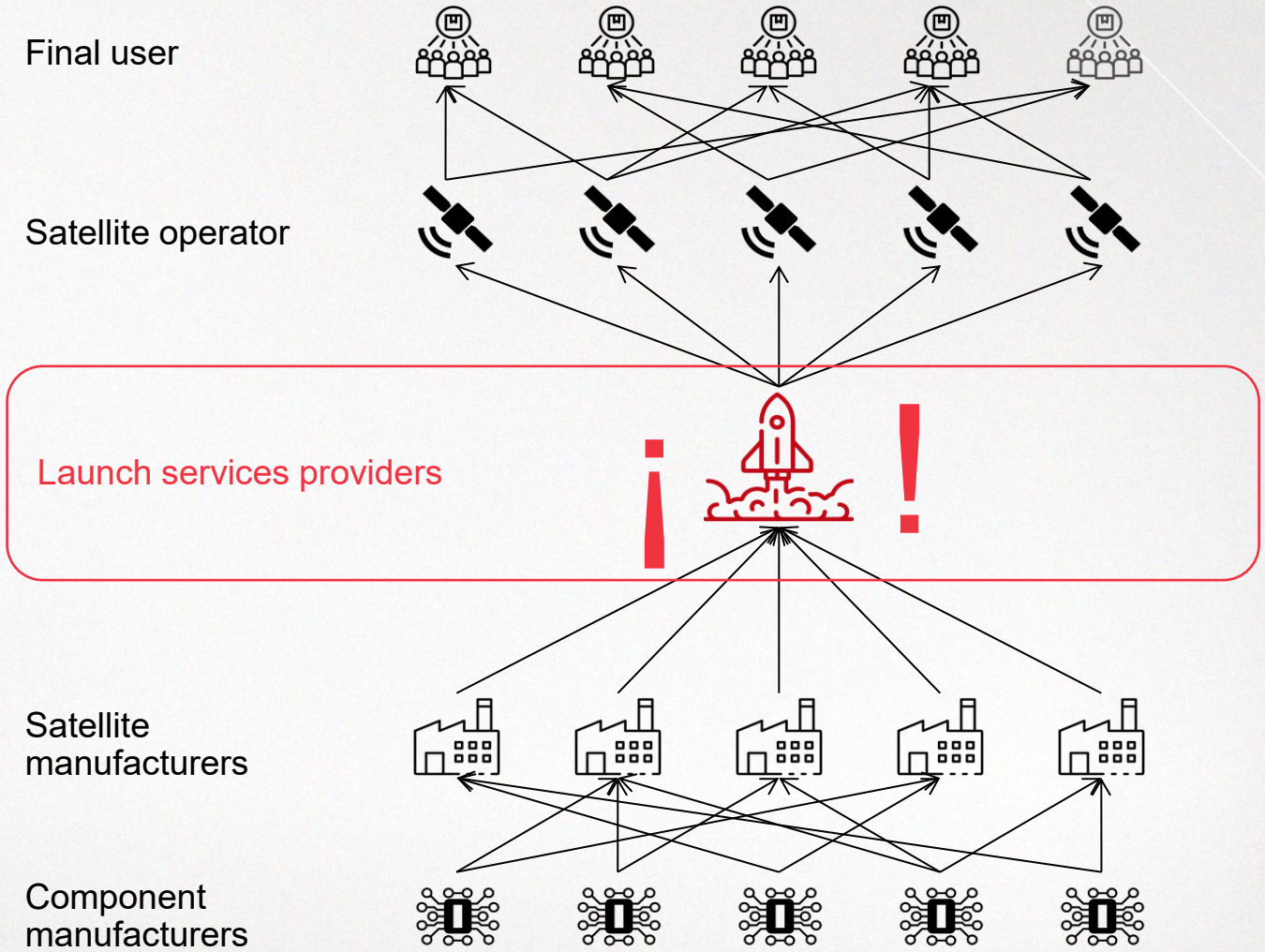
Constellation ambitions far exceed current deployment capacity

Constellation	Planned	In Orbit
Starlink	42,000	11,100
Qianfan	15,000	240
Guowang	13,000	190
Amazon Leo	3,236	400
IRIS2	348	0

Sources: Company filings and public statements (SpaceX Starlink, Amazon Leo, China SatNet / Qianfan & Guowang, EU IRIS²); CelesTrak for in-orbit counts.

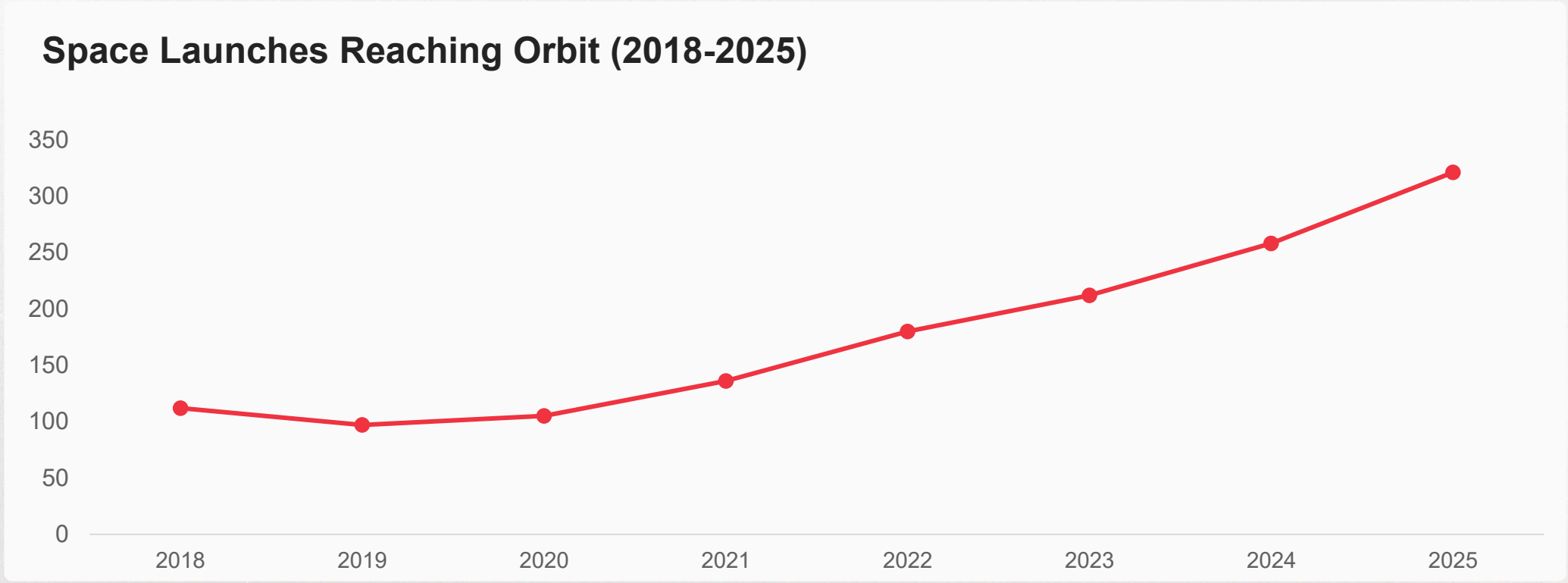
Every euro of the space economy starts with a launch

Access to space is the narrow gate to a $686 B (and growing) economy.



Access to Space has tripled in seven years

More rockets are flying than at any point in history.



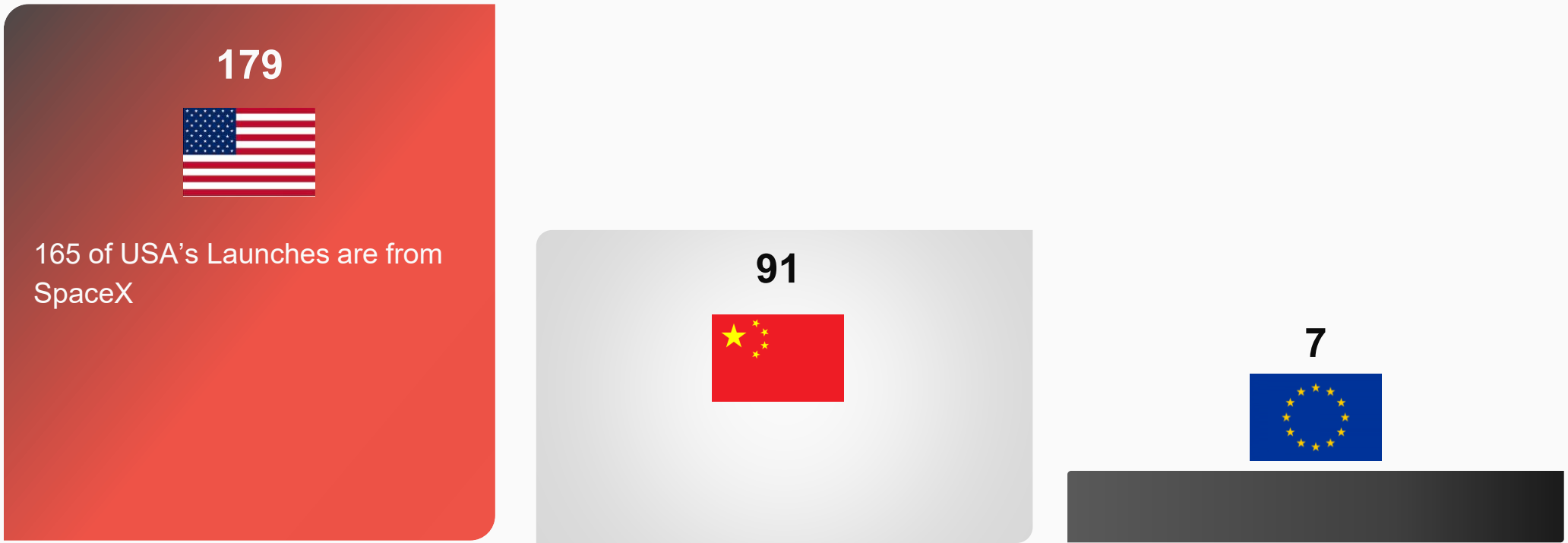
Sources: SpaceX flight data; Jonathan McDowell / Launch Library 2 / KeepTrack orbital launch statistics (2018–2025).

The boom has one clear driver

The United States accounts for most of the growth thanks to SpaceX. China is far behind. Europe is residual.

- ~85% of all satellites that reached orbit in 2025 flew on Falcon 9.

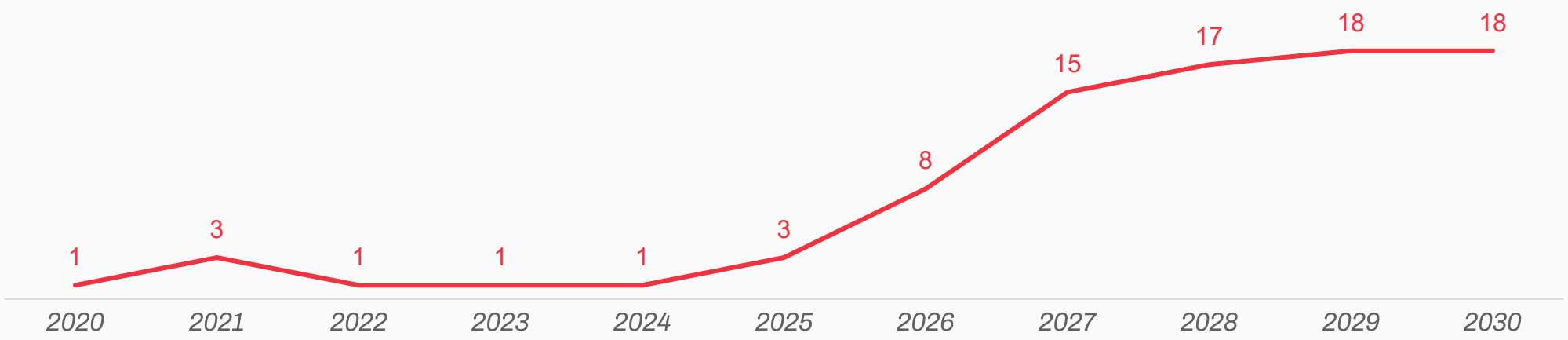
Space Launches Reaching Orbit (2025)



While the US is aiming +1,000 of launches a year by 2030, Europe is still counting in single digits

- US commercial and institutional plans (SpaceX + others) point toward hundreds to thousands of launches annually by the early 2030s.
- New European private capacity is required to change the low current cadence.

European Institutional launch cadence



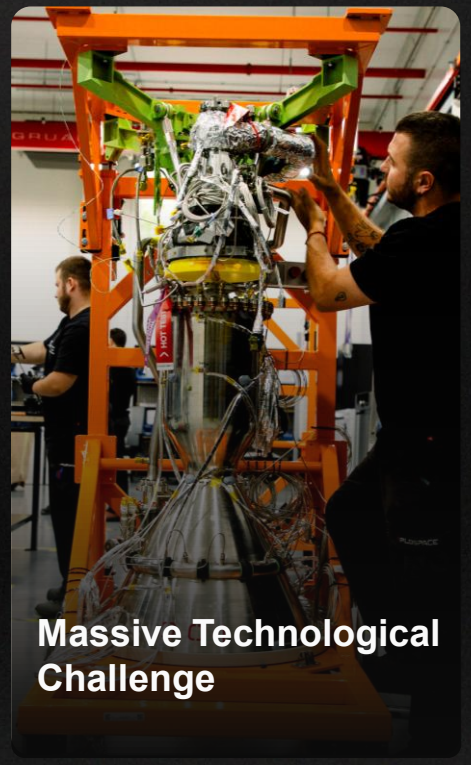
Projections: Arianespace public statements on Ariane 6 production ramp-up (target of ~9–11 launches/year in the late 2020s); Amazon Leo order book impact.

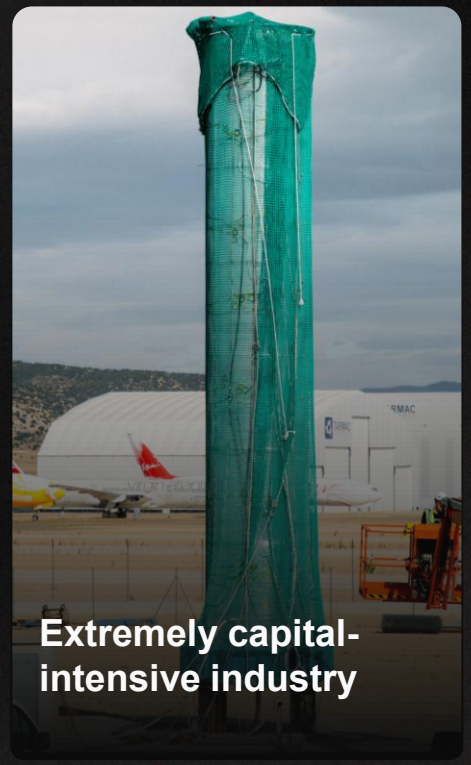
How we turn ambition into execution



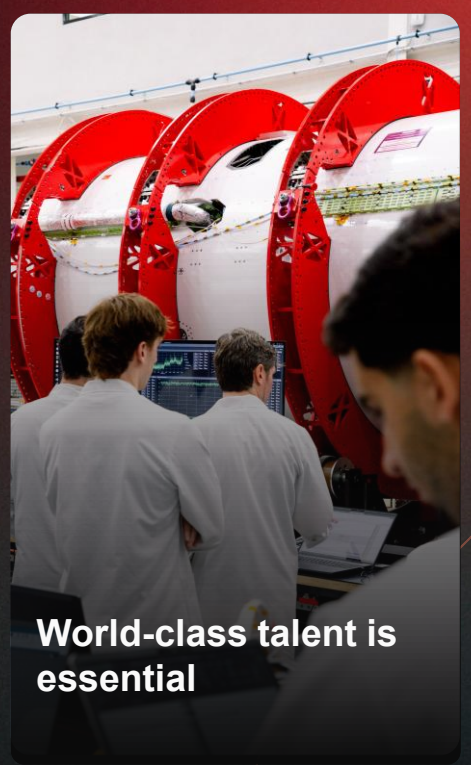
Launch remains brutally hard

Four barriers that make this industry nearly impossible to enter:





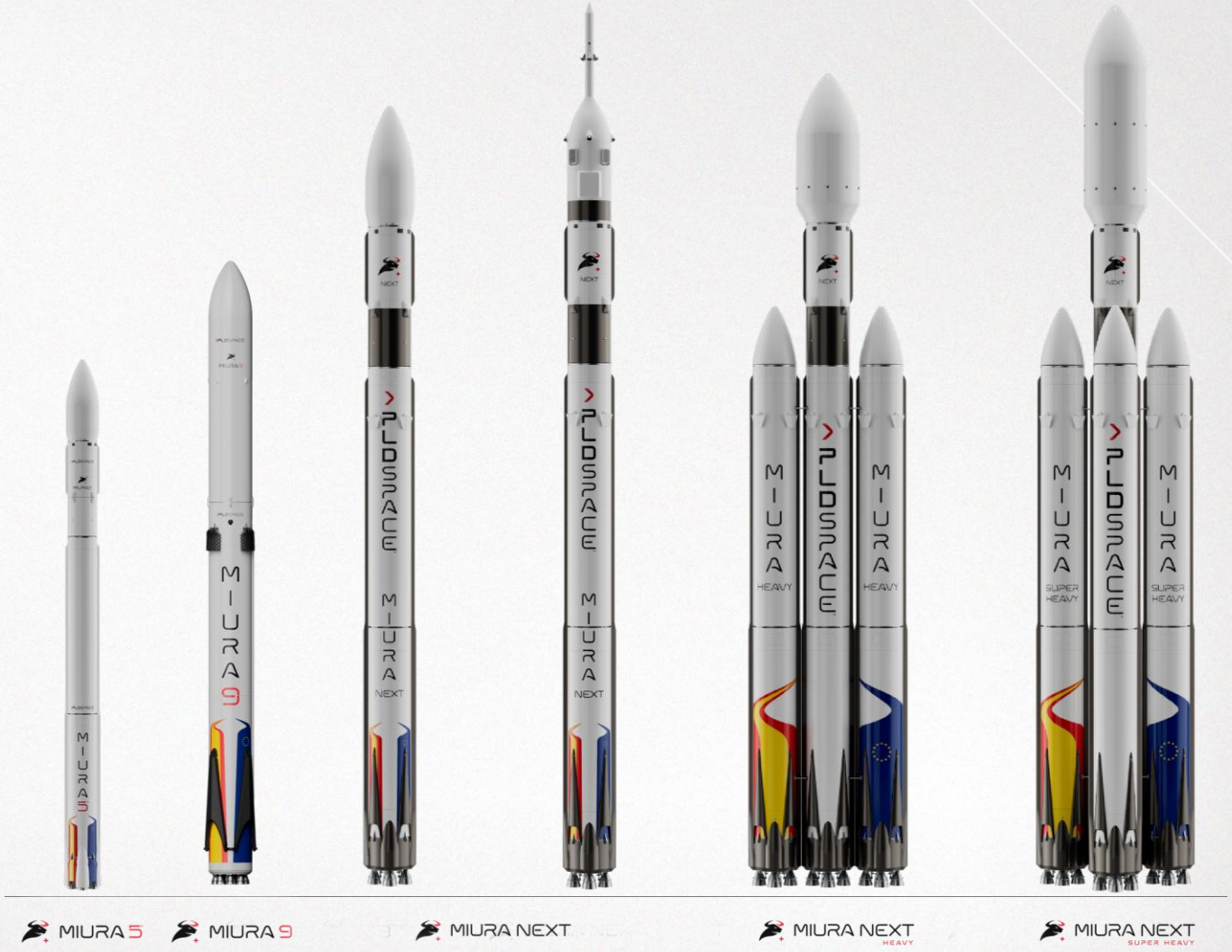




Meet the ambition Europe demands

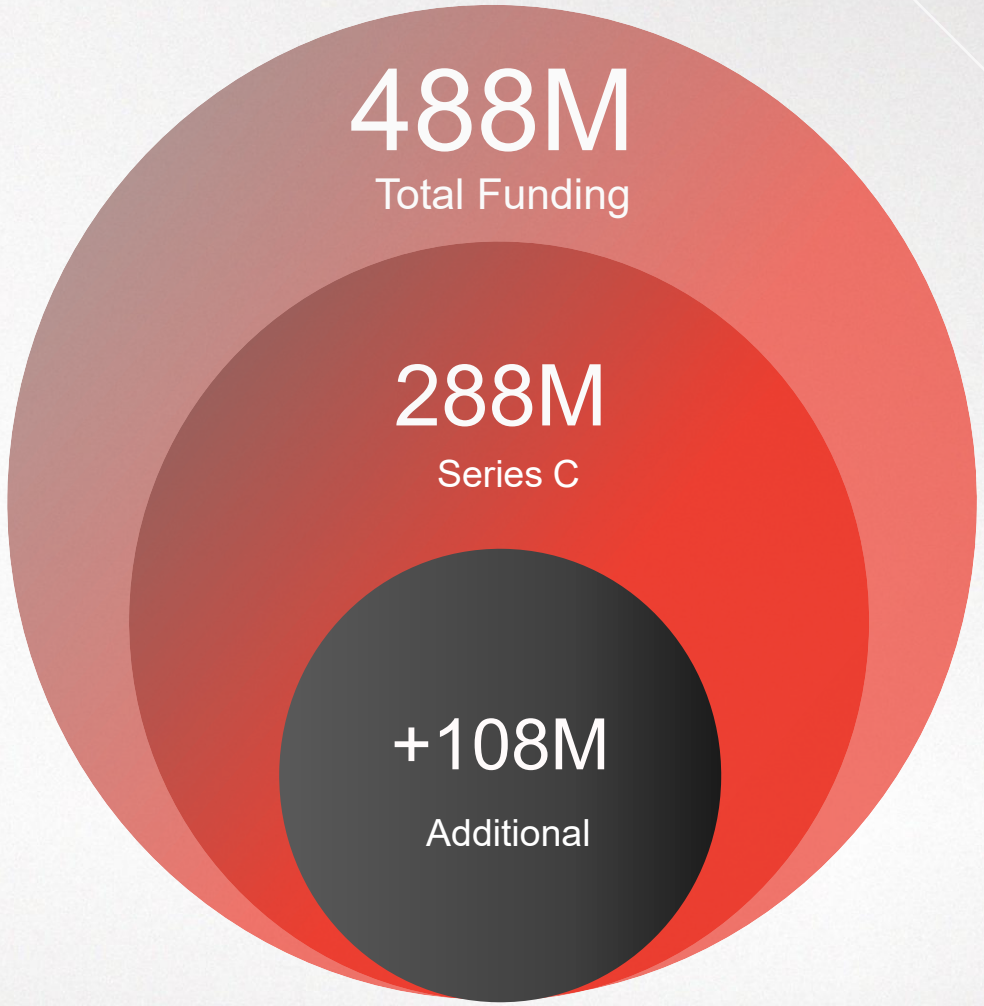
From the first private European launcher to a heavy reusable workhorse.

- Each vehicle reuses the industrial base, test infrastructure and operational experience of the previous one.
- Each step reduces technical and operational risk before the next.



Ready to deliver & scale

+€288M



We are developing the next generation of European launchers

€158,9M

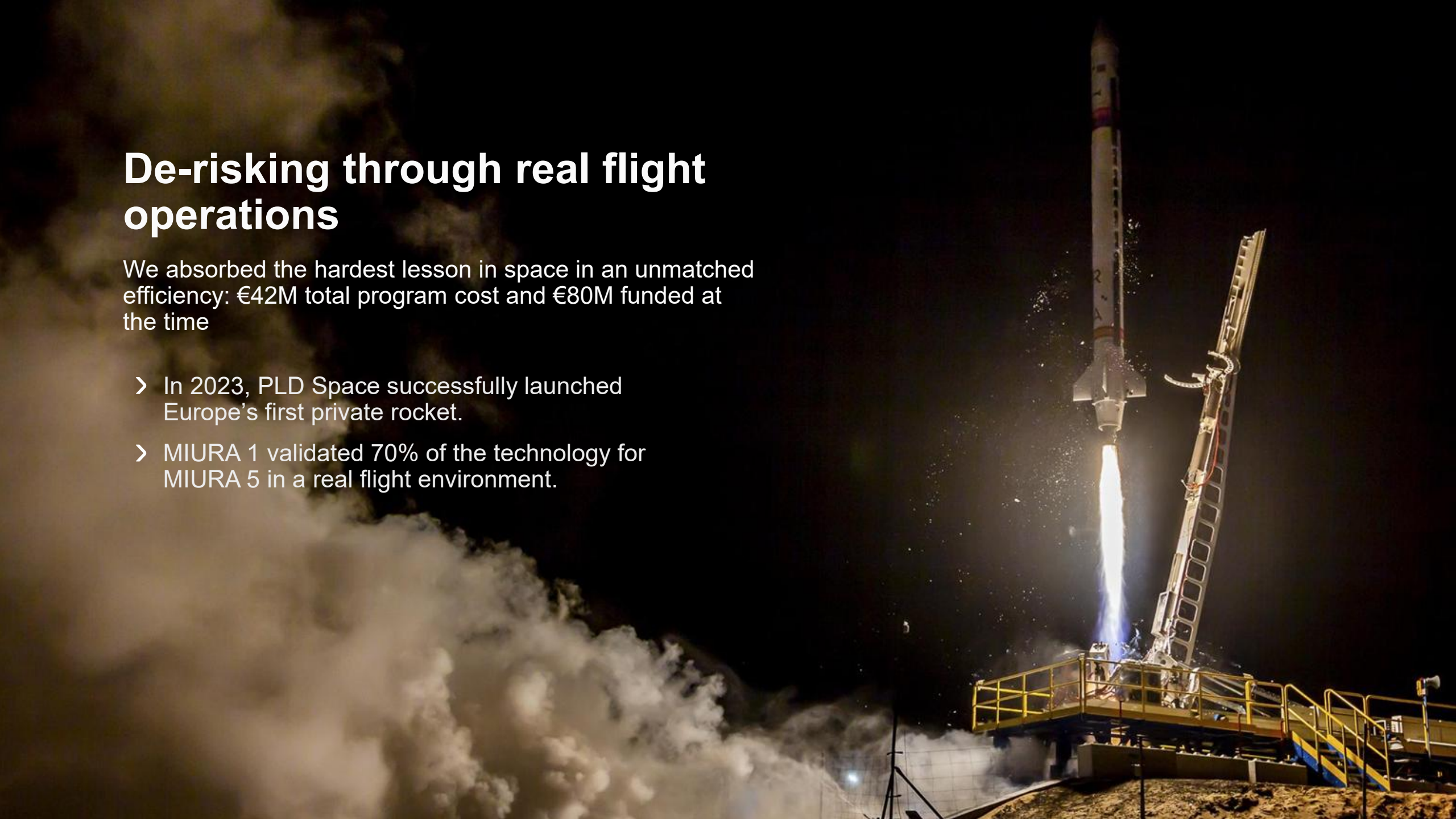
Obtained through the European Launcher Challenge (ELC) contract, an initiative established by the European Space Agency (ESA).



De-risking through real flight operations

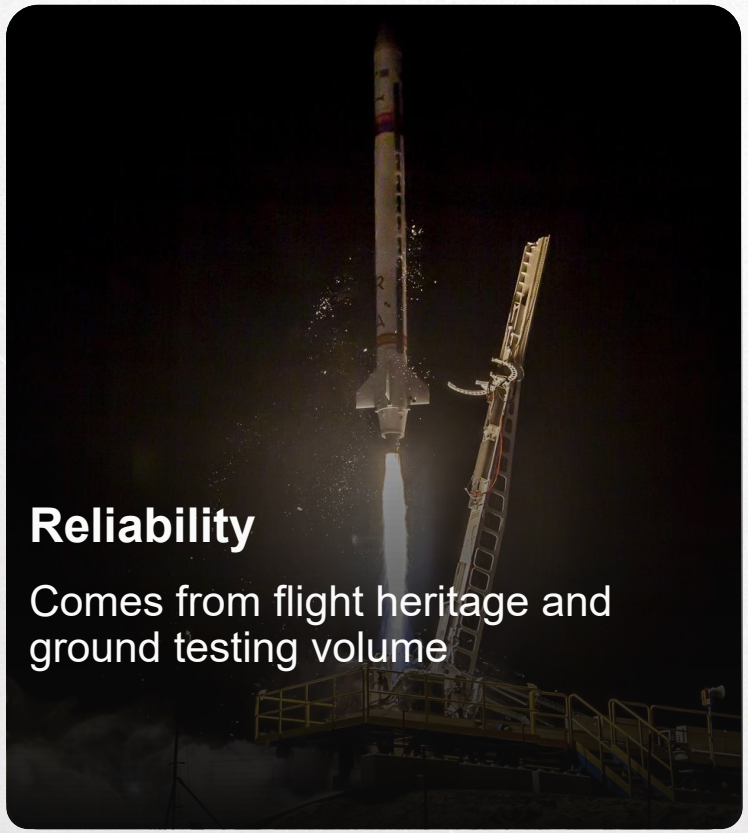
We absorbed the hardest lesson in space in an unmatched efficiency: €42M total program cost and €80M funded at the time

- In 2023, PLD Space successfully launched Europe’s first private rocket.
- MIURA 1 validated 70% of the technology for MIURA 5 in a real flight environment.



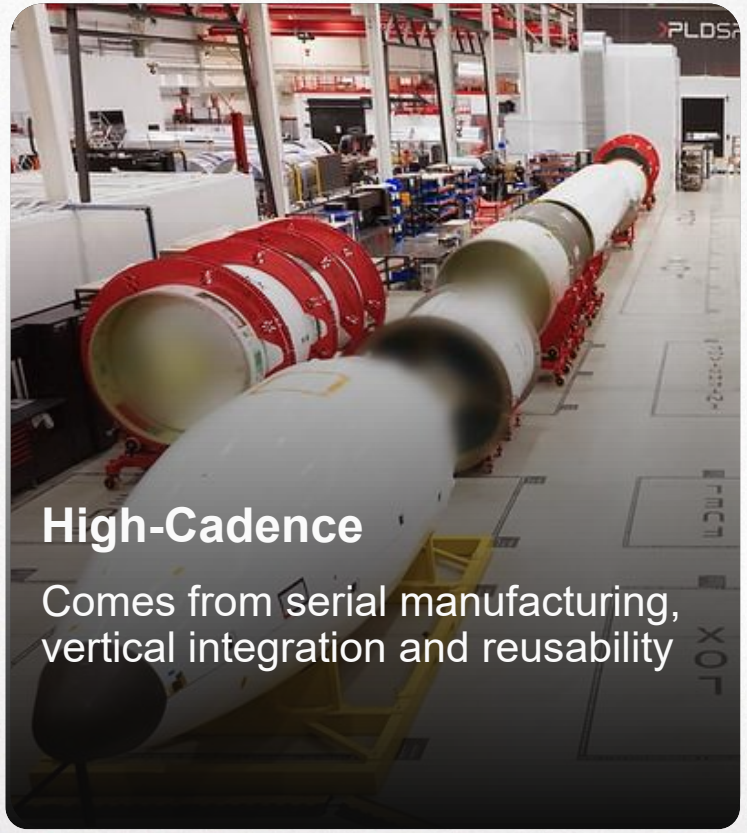
Every choice is taken for reliability, cadence and cost

We built the company to convert a first flight into a repeatable, affordable access to space service.



Reliability

Comes from flight heritage and ground testing volume



High-Cadence

Comes from serial manufacturing, vertical integration and reusability



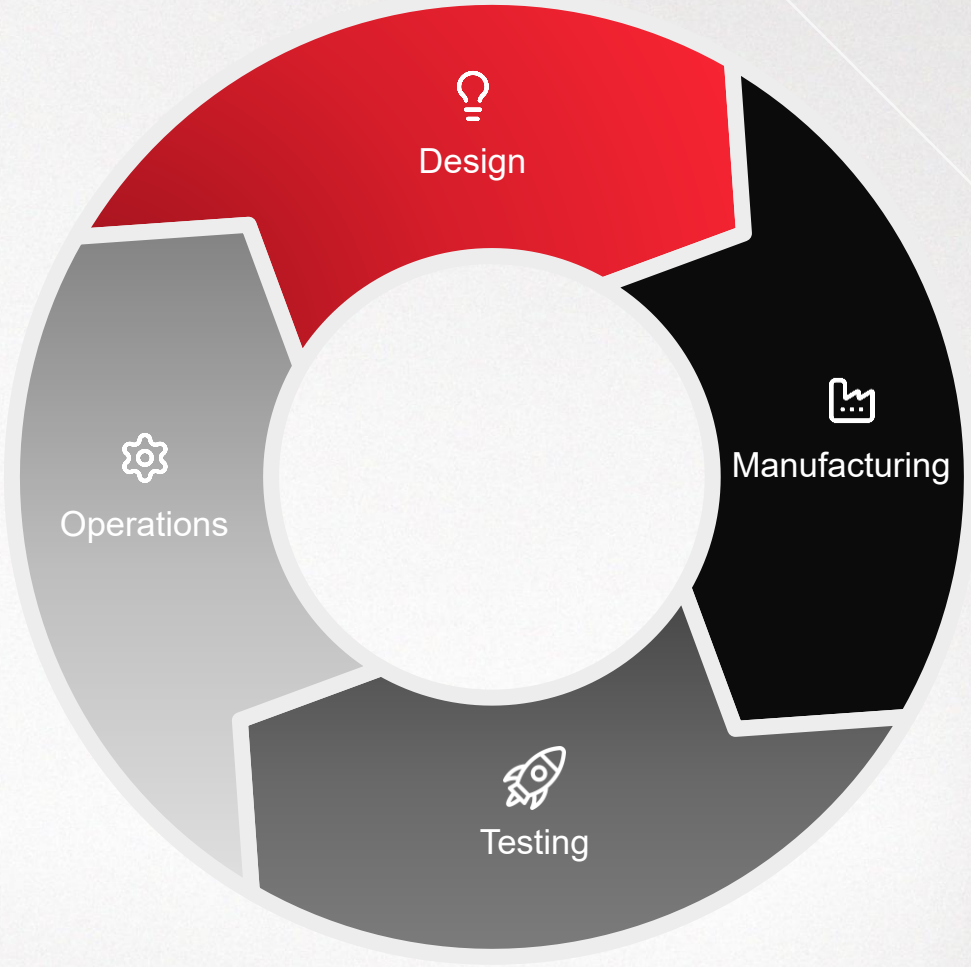
Cost-efficiency

Comes from robust, industrialisable technology and facilities already sized for volume

Vertical integration allows direct control of cost, schedule and quality

Design, manufacturing and testing under one roof.

- Fewer external interfaces shorten the iteration loop between design, manufacturing, test and fix.
- Faster learning cycles than a distributed supply chain.

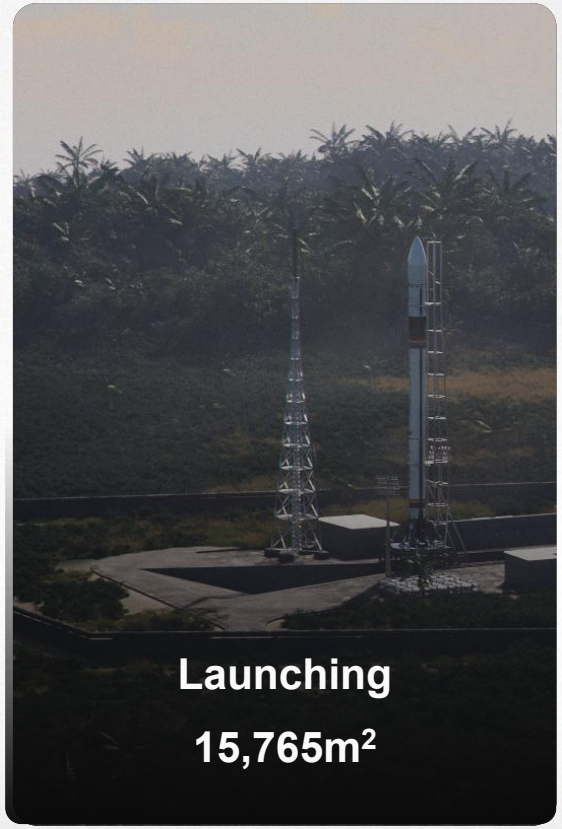


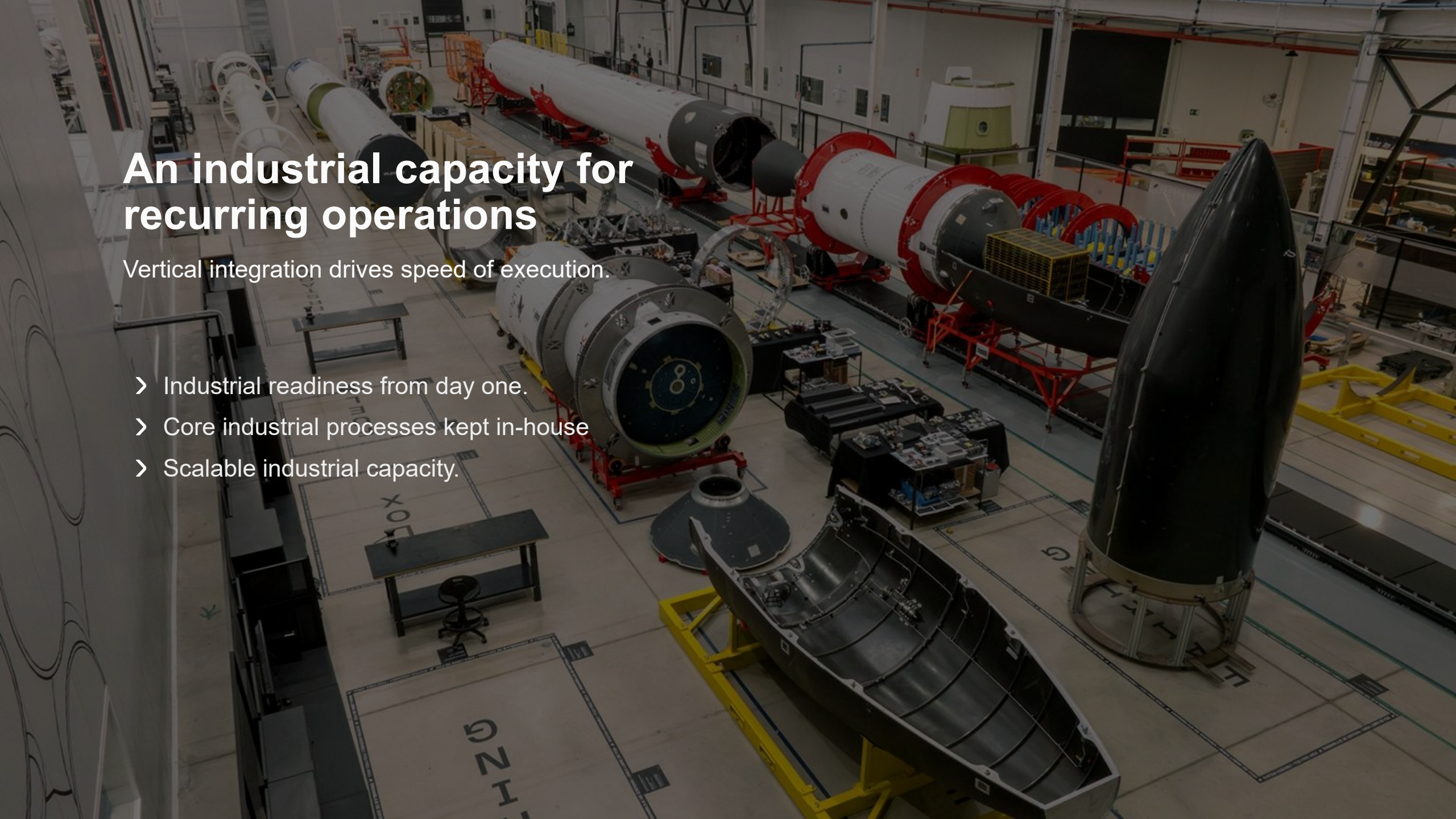
Scaling Europe’s largest private space industrial footprint

Facilities already sized for the cadence we intend to fly.





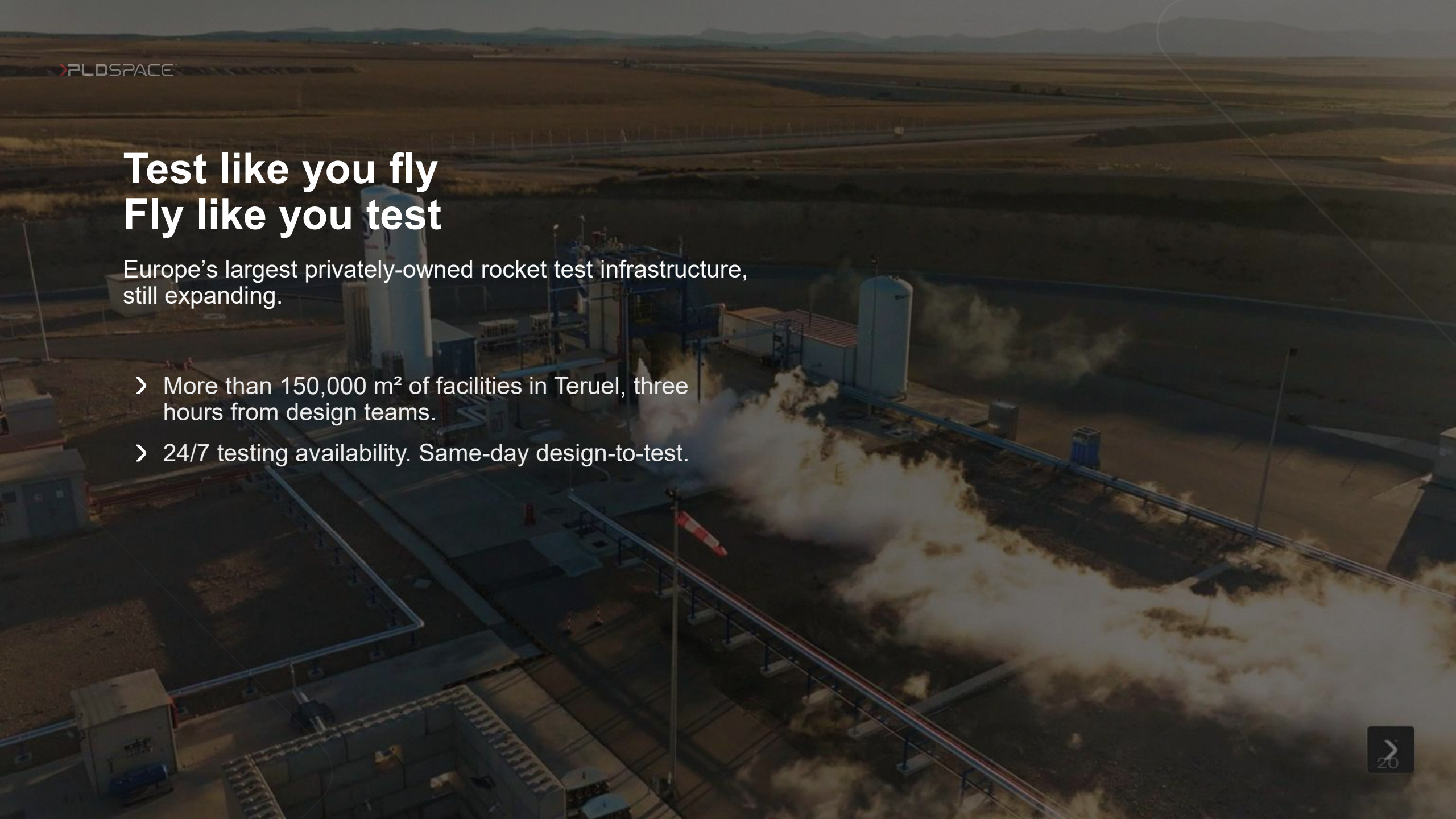




An industrial capacity for recurring operations

Vertical integration drives speed of execution.

- Industrial readiness from day one.
- Core industrial processes kept in-house
- Scalable industrial capacity.



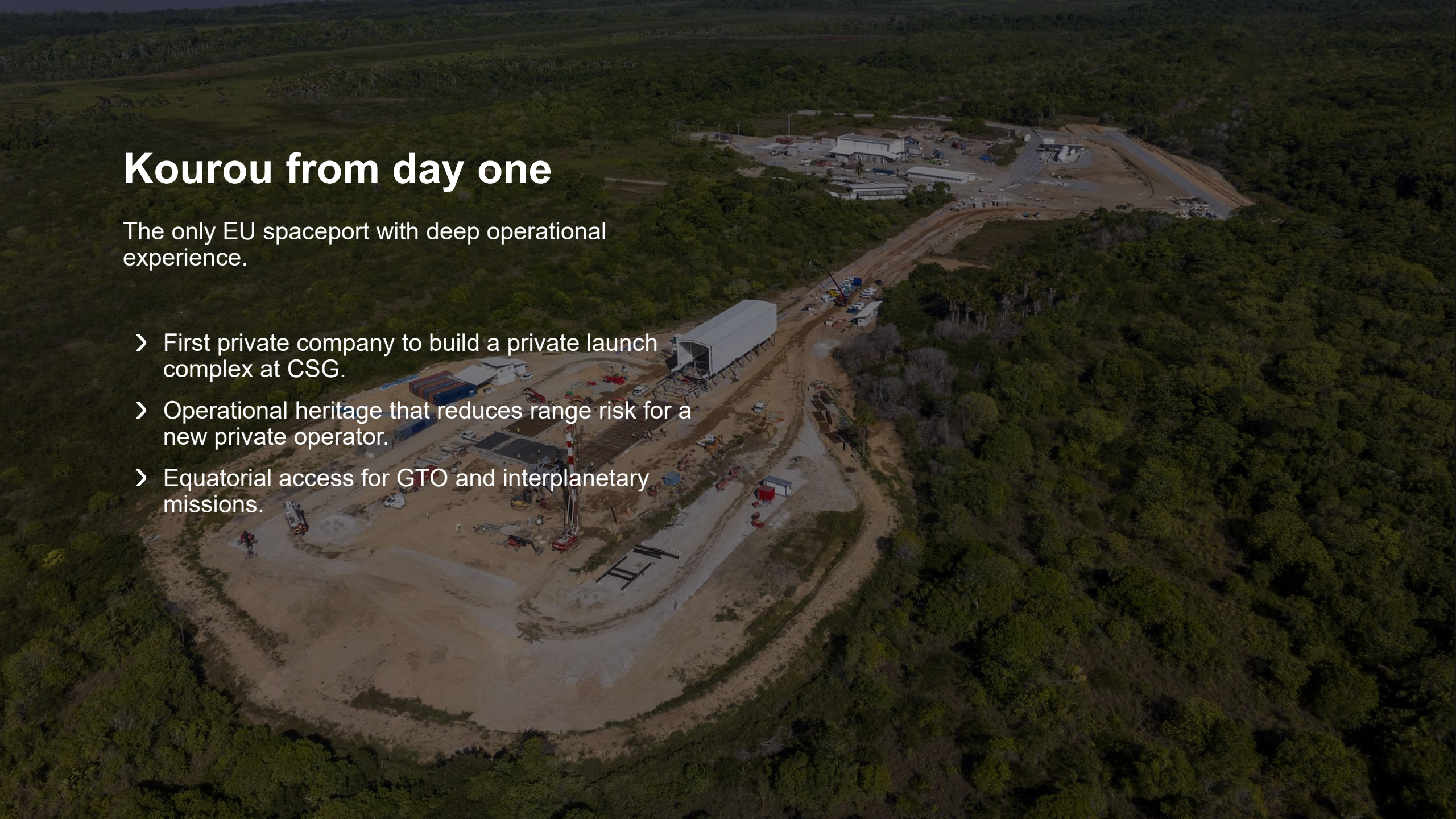
Test like you fly
Fly like you test

Europe’s largest privately-owned rocket test infrastructure, still expanding.

- More than 150,000 m² of facilities in Teruel, three hours from design teams.
- 24/7 testing availability. Same-day design-to-test.

Kourou from day one

The only EU spaceport with deep operational experience.



- First private company to build a private launch complex at CSG.
- Operational heritage that reduces range risk for a new private operator.
- Equatorial access for GTO and interplanetary missions.



Strengthening the Spanish space industry from Elche

PLD Space is driving a national space industry built on SMEs, creating direct value for the Spanish and European space sectors.

42,7M

invested in the MIURA programme supply chain in Spain since 2024.

+7,500

parts subcontracted to Spanish suppliers.

493

Spanish suppliers contributing to the MIURA 5 programme.

+1,000

direct, indirect and induced jobs.

#VAMOSMIURA

PLDSPACE™