



# ORBIT ORBIT

Building the service network for the  
Orbital economy



Corporate Presentation – August 2026

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# THE TEAM

Building the Infrastructure Layer for Space



Bradley Hatton-Jones

Founder & CEO

- 20+ years engineering experience in aerospace/mining
- Built Australia's largest rocket factory & Senior Manufacturing Engineering ERIS project.



Dr. Philippe Laniakea

CTO

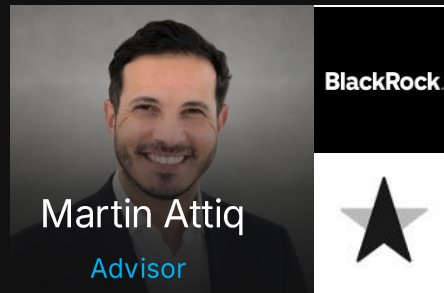
- 17+ years in space vehicle manufacturing
- Previous head of Satellites at Gilmour Space & UNSW Canberra.



Amal Khatri

CSO

- 25+ years in engineering
- Former Exec Director of SANSA
- 20+ years in spacecraft development



Martin Attiq

Advisor



Chris Hyland

Advisor

**60+ YEARS** OF EXPERIENCE & **12+ SUCCESSFUL MISSIONS**



# OUR MISSION

Orbit2Orbit is building the logistics, servicing and return network for Low Earth Orbit, reusable cargo vehicles equipped with robotic systems to inspect, repair, upgrade and replace critical subsystems for space assets and move cargo between space stations.

## Project Vision

Orbit2Orbit solves this with a reusable vehicle that docks, transfers cargo, collects critical assets and redeploys between orbital platforms. This enables repeatable logistics cycles and reduces reliance on Earth-based resupply.

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The system is validated through a structured Lab-to-Space program, where modular payloads are flight-tested in near-space before orbital deployment, proving both hardware and operations.

**Lab-to-Space** is Orbit2Orbit's staged validation pathway:  
lab integration  stratospheric flight  suborbital flight  orbital deployment.

It lets customers test hardware, interfaces, and operations before committing to higher-cost orbital missions.

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We are enabling a sustainable, circular space economy, powering the trillion-dollar future of space.



# WHY NOW

## FOUR FORCES. **ONE NEW ECONOMY.**

### 1. **95% cheaper**

#### Launch is solved

\$54,500/kg then. \$2,720 now. \$200 next target. When launch stops being the bottleneck, the bottleneck moves to what comes before and after it.

NASA AMES 2018 · CSIS AEROSPACE SECURITY

### 2. **2.2M candidates**

#### AI is outrunning physical testing and validation

AI has discovered more than 2.2 million new materials, accelerating innovation across aerospace, defence, semiconductors and advanced manufacturing.

DEEPMIND / NATURE, GNO ME, 2023

### 3. **US \$1.8T economy**

#### The space economy is tripling

Nearly 3x by 2035. Comms, mining, lunar, robotics, human flight, orbital and edge compute.

WEF / MCKINSEY, 2024

### 4. **US \$55.3B invested**

#### Capital is pouring in

Investment in the global space sector across 431 companies in 2025, highlighting continued investor confidence in the commercialisation of the space economy. Q4 alone accounted for US\$17.0 billion invested across 135 financing rounds.

Space Capital, Space IQ Report Q4 2025.

EVERY FUTURE SPACE LOGISTICS CUSTOMER BEGINS WITH A TECHNOLOGY THAT **MUST FIRST BE VALIDATED.**

That is the layer Orbit2Orbit owns.

# THE PROBLEM

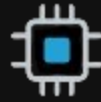
The Space Economy is Scaling. Logistics Isn't.

The drastic increase in active people & space stations is transforming space logistics into a burgeoning commercial market, expected to reach US \$51 billion in the 2030's.



## SATELLITE CONSTELLATIONS

**+18,000** sats by 2030



## ORBITAL DATA CENTRES

**\$39B** by 2035



## IN-SPACE MANUFACTURING

**\$135B** by 2040



## DEFENCE & MISSILE DEFENCE

**\$1.2T** Golden Dome



## LUNAR & CISLUNAR

**Artemis** by 2030



## SPACE-BASED SOLAR POWER

**~5X** growth by 2035 - 17% CAGR

4X People in Space | 4X Cargo Logistics Needed



## ISS

CREW: 6



Current



## CSS

CREW: 3



Current



## HAVEN

CREW: 12



2027



## ROSS

CREW: 4



2028



## AXIOM

CREW: 8



2028



## STARLAB

CREW: 4



2029

Cargo Capacity  
10,000kg / Yr  
(US\$20,000,000 /year)

Cargo Capacity  
20,000kg / Yr  
(US\$40,000,000 /year)

Cargo Capacity  
40,000kg / Yr  
(US\$80,000,000 /year)

# AI's next constraint is physical

**945 TWh**

GLOBAL DC ELECTRICITY  
BY 2030

More than 2x 2024 demand

**US\$6.7T**

DATA-CENTRE CAPEX  
BY 2030

US\$5.2T for AI capacity

**49 GW**

ESTIMATED US POWER  
SHORTFALL BY 2028

74 GW demand vs ~25 GW supply

**71%**

OPPOSE A LOCAL  
AI DATA CENTRE

Community resistance is material

SPACE CAN REMOVE THE GRID CONSTRAINT.

**THE HARDWARE STILL HAS TO SURVIVE - AND STAY PRODUCTIVE.**

LAUNCH • RADIATION • THERMAL CONTROL • POWER • COMMUNICATIONS • DEBRIS • OBSOLESCENCE

# THE SOLUTION

ORBIT2ORBIT VALIDATES. THEN MOVES.

## VALIDATE

Lab2Space™

Affordable, repeatable microgravity validation before launch.

- Standardised flight platform
- Low-cost flight validation
- Beyond bench, vibration + TVAC
- Repeatable flight campaigns
- Rapid path from lab to orbit

Lab → stratospheric → suborbital → orbital

## OPERATE

Orbital Logistics

Reusable transportation and infrastructure that move cargo throughout orbit.

- Orbital cargo transport
- Station-to-station logistics
- Non-earth based asset inspection
- Subsystem component replacement
- Orbital Storage
- In-space servicing and repair
- Future lunar logistics
- Asset deployment and relocation
- Return to earth capabilities
- In-space bio manufacturing

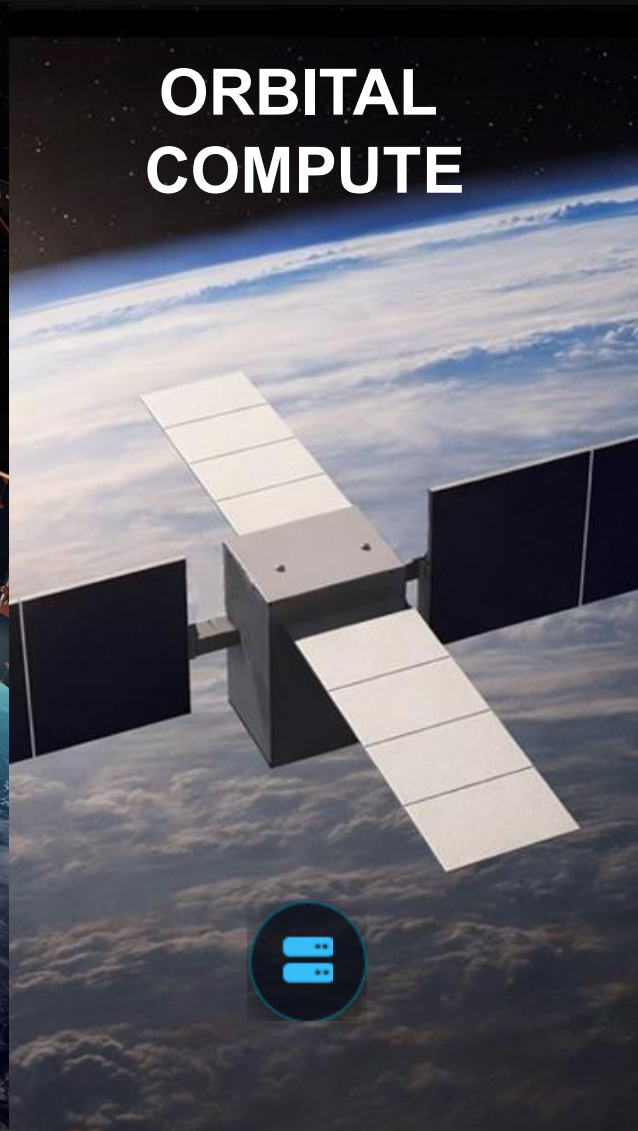


# FOUR MARKETS. ONE INFRASTRUCTURE NETWORK.

## DEFENCE SUPPORT



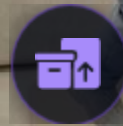
## ORBITAL COMPUTE



## IN-SPACE MANUFACTURING



## CARGO LOGISTICS

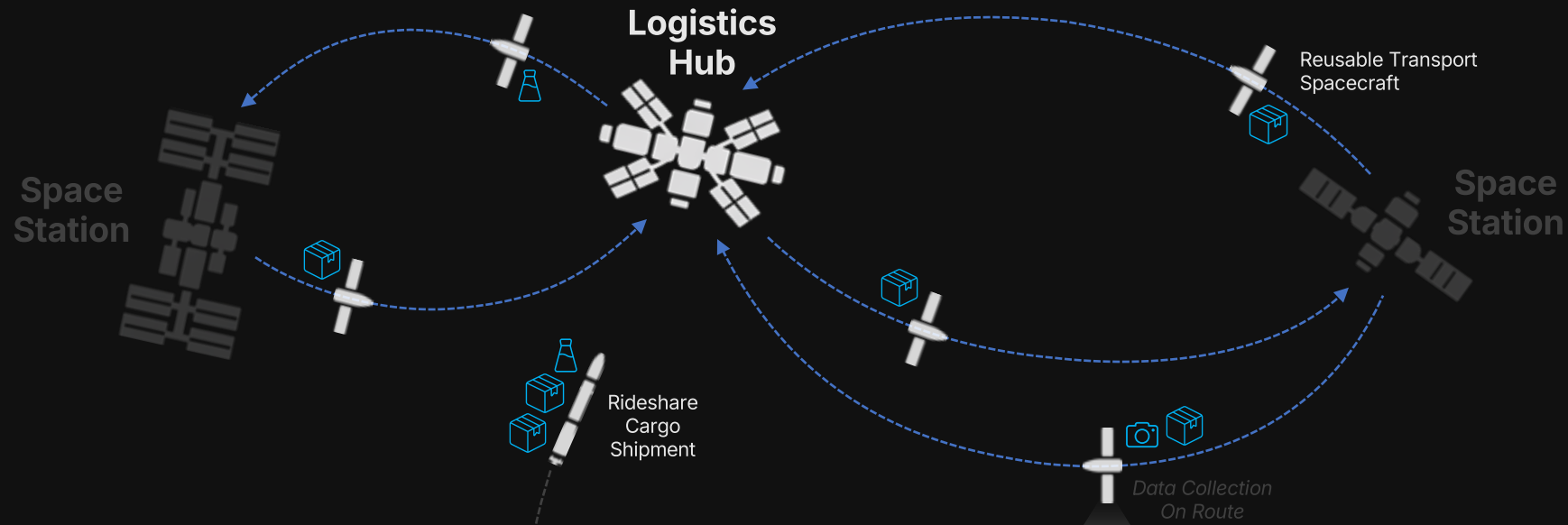




# IN-ORBIT ECONOMY

## Autonomous vehicle operations & Refueling in Orbit

- Move cargo, payloads and hardware between platforms
- Retrieve, redeploy, inspect and service assets in orbit
- Support defence, compute, manufacturing and station logistics
- Designed for repeatable operations, not one-off missions





# DISTRIBUTION PLATFORM

## Reusable Transport Spacecraft (RTS)

RTS vehicles transport cargo between stations & provide on-route data collection services for clients.

- Proprietary Propulsion \*
- Autonomous Flight
- Fuel Generation
- Maintainable

## Orbital Servicing Unit (OSU)

OSU's are modular structures added to space stations to enable RTS docking, cargo/data extraction/loading, and in-space maintenance.

- Proprietary Docking
- Modular Scaling
- Maintenance Support

\*Resist propulsion pathway

Orbit2Orbit is developing an in-space refuelling propulsion approach designed for low-thrust in-space manoeuvring and future station-supported operations.



RTS DOCKING TO OSU

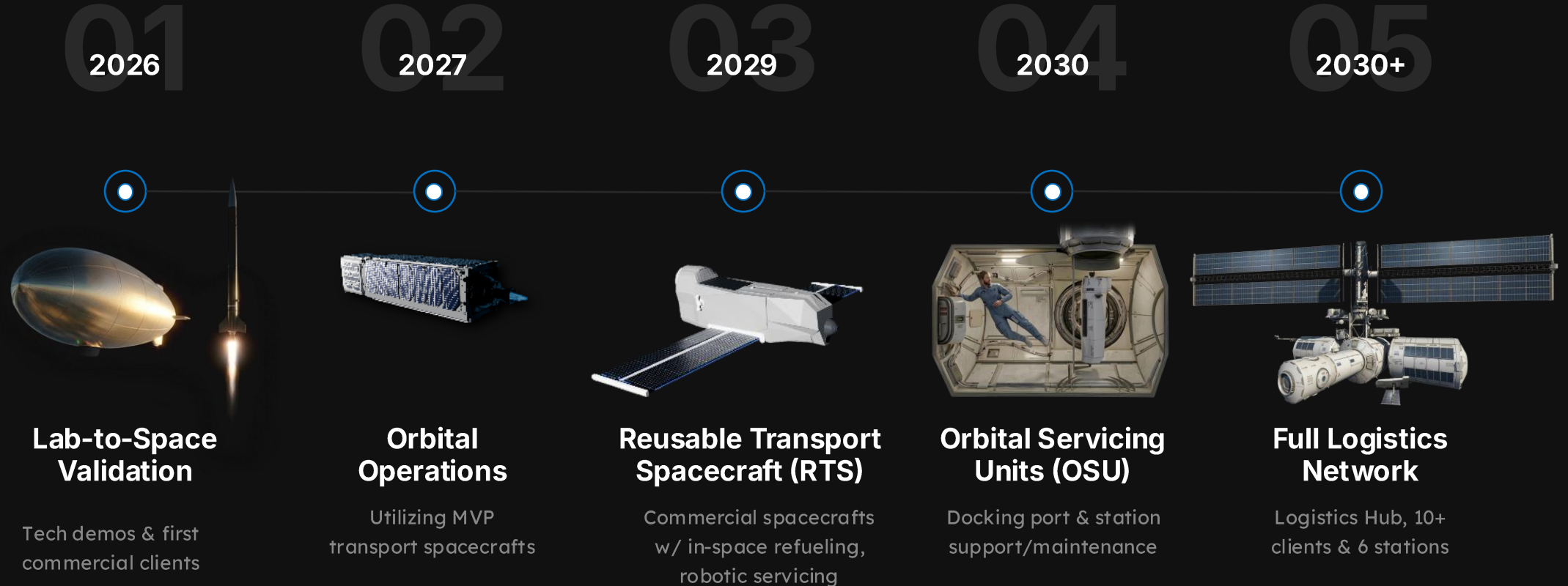


INSIDE OSU



# PROJECT ROADMAP

BUILDING THE INFRASTRUCTURE LAYER IN ORBIT



WE DON'T LAUNCH CARGO. **WE MOVE IT ONCE IT'S THERE.**

# GO TO MARKET

FUSION VENTURE LABS • SEED INNOVATION • GLOBAL SPECIFIC ADVISORS

## Science Missions

- Lab-to-Space missions
- Multiple research clients per year
- Already generating revenue

US \$10M+ per year

## Station Support

- Cargo distribution infrastructure (Rollout Orbital Servicing Units)
- Station maintenance support
- Data centres / orbital platform

US \$100k/week/client

## Full Logistics

- Six stations, 40tonnes per year
- Multiple cargo revenue streams
- Dominant LEO logistics network
- Rentable bus for payload housing

US \$2,000/kg

2027

2029

2030+

**We don't chase the market. We build it.**



# THE GROWTH ENGINE

REVENUE NOW. **EVERY CUSTOMER A FUTURE LOGISTICS CUSTOMER.**

## THE CUSTOMER JOURNEY

### LAB2SPACE · REVENUE TODAY

- LAB**  
Design, prototype and test on the ground
- STRATOSPHERIC**  
First paid validation flight
- SUBORBITAL**  
Microgravity and repeat flights
- ORBITAL**  
Full qualification mission

### ORBITAL LOGISTICS · RECURRING REVENUE

- **ORBITAL LOGISTICS & SERVICING**  
Transport, servicing and resupply between platforms
- **ORBITAL LAUNCH IS BOOKED TO 2029**  
Lab2Space will be the only method to validate technology in 2027/28

## GLOBAL LAUNCH ACCESS · 2027

AMERICAS · EUROPE · MIDDLE EAST · ASIA · AUSTRALIA

**133U** Lab2Space capacity  
for 2027



ONE TRUSTED RELATIONSHIP, **FROM THE LAB ALL THE WAY TO ORBIT.**

# SPACE LOGISTICS IS EMERGING

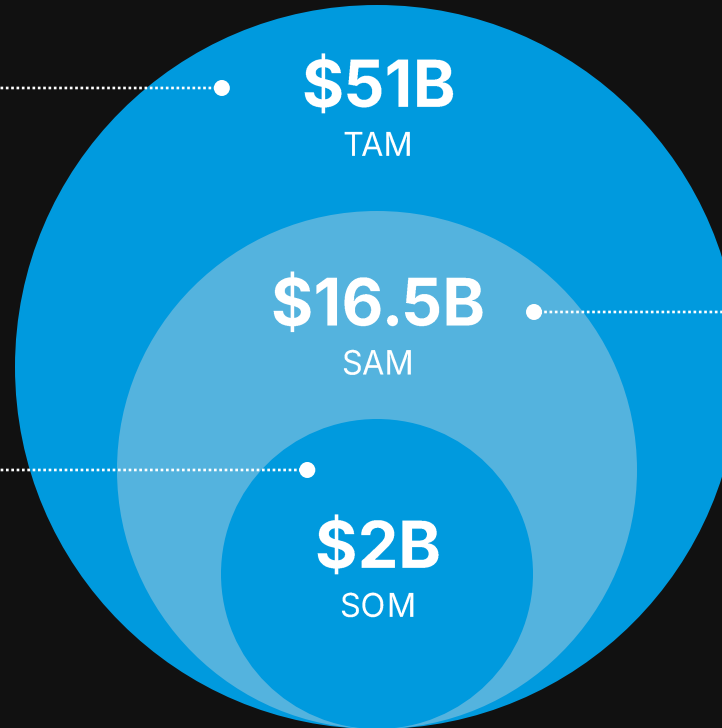
Driven by defence & sovereign demand, LEO saturation, in-orbit servicing & logistics shift

## \$51 Billion (TAM)

- Space economy → \$1.8T by 2035
- Commercial dominates ~80% of revenue
- In-orbit economy rapidly expanding
- Government spending ~\$135B annually
- Satellite services dominate value creation

## \$2 Billion (SOM)

- Defence budgets driving early demand
- High value, low volume missions
- First movers capture logistics layer
- Sovereign capability demand accelerating
- Limited competition in orbital logistics



## \$16.5 Billion (SAM)

- 40,000kg/year orbit cargo demand
- Launch costs down ~90%
- LEO constellations driving logistics demand
- Rideshare missions increasing launch cadence
- Reusable rockets enabling frequent access

2035 TARGET: ~\$2B SOM ACROSS TRANSPORT, SERVICING & RECURRING ORBITAL LOGISTICS  
~12% OF THE \$16.5B SERVICEABLE MARKET; 40,000 KG/YEAR REPRESENTS THE INITIAL CARGO OPPORTUNITY ONLY.

# COMPETITIVE LANDSCAPE

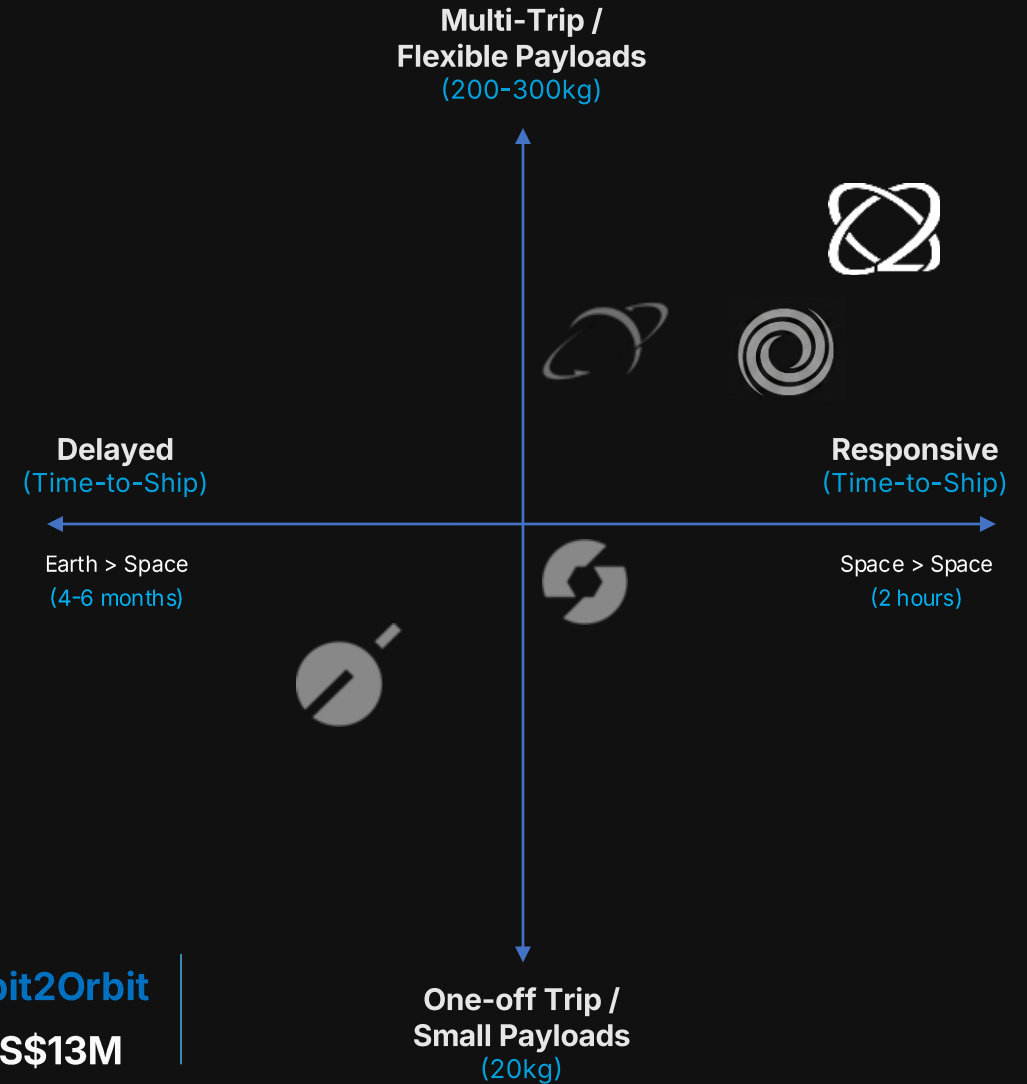
Orbit2Orbit is a full service in-space logistics network where existing competitors are single-directional Task Specific Tools.

| Feature              | Orbit2Orbit                                                                         | Competitors             |
|----------------------|-------------------------------------------------------------------------------------|-------------------------|
| Primary role         | In-Space Logistics                                                                  | Land-to-Space Delivery  |
| Reusable             | Yes                                                                                 | Limited or No Reuse     |
| Refuellable in orbit | Yes                                                                                 | Limited or No Reuse     |
| Maintainable         | Yes (inside station)                                                                | No                      |
| Autonomous Routing   | Yes                                                                                 | No (fixed vector ops)   |
| Target use case      | Cargo delivery/storage, data collection, fuel, waste removal, multi-mission support | Direct payload delivery |

|                |          |              |               |             |
|----------------|----------|--------------|---------------|-------------|
| Space Machines | D-Orbit  | Portal Space | Impulse Space | Orbit2Orbit |
| US\$120M       | US\$1.3B | US\$250M     | US\$4.26B     | US\$13M     |

Comparable market caps of our competition operating in LEO.

Target Capability chart



# EXECUTION MILESTONES

DE-RISKING EVERY LAYER OF THE COMMERCIAL SPACE ECONOMY

TRACTION

## CAPITAL

Bridge Round Oversubscribed

### CAD \$1.5M+

Funding secured to accelerate Lab2Space™ commercialisation, manufacturing capability and public market readiness.

Opening Round completed. Founder capital secured.

## DEDICATED SPACE MANUFACTURING HQ

Dedicated Space Manufacturing HQ Operational

- Clean Room
- Payload Integration Lab
- Hardware in the Loop Testing
- Engineering Workshop
- Mission Operations

## GLOBAL MARKET ACCESS

Global Launch Network Established



One payload integration. Global launch capability across multiple providers.

## COMMERCIAL VALIDATION

- \$25M in contract/contracting
- Multiple SLA for Lab2Space
- LOI being discussed with APEX Space
- Secured space launch 2027

## GLOBAL COMMERCIAL CUSTOMERS

Queensland University of Technology (ESIS)

Space CoLAB

EmTDLab

Northstrive (NSAIU)

TIGS

Commercial customers actively utilising the Lab2Space™ platform.

## QUALIFIED COMMERCIAL PIPELINE

### CAD \$500M QUALIFIED PIPELINE

Qualified commercial opportunities across research, government and commercial markets.

## FLIGHT HERITAGE

### First Flight Heritage Achieved

Parallax PHU successfully launched and recovered.

- |                              |                            |
|------------------------------|----------------------------|
| ✓ Successful launch          | ✓ Successful recovery      |
| ✓ First flight heritage      | ✓ Lab2Space™ validated     |
| ✓ Payload integration proven | ✓ Mission ops demonstrated |

MISSION SUCCESS

Capital secured • Manufacturing HQ operational • Global launch capability established • Commercial customers secured • Flight heritage achieved

SYSTEMATIC DE-RISKING ACROSS EVERY LAYER OF THE BUSINESS



# TECHNOLOGY CONSORTIUM

## 1. Collaboration Between Industry Leaders

The best deep-tech companies in Australia contributing avionics, materials, digital twins, and mission operations.

## 2. Drastically Reduces Mission & R&D Risk

By leveraging industry leaders, O2O can reduce R&D and operating costs while raising the probability of mission success.

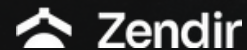
## 3. Ensures Key Components Work Together

O2O works closely with its partners to ensure maximum compatibility with current & future product implementations.

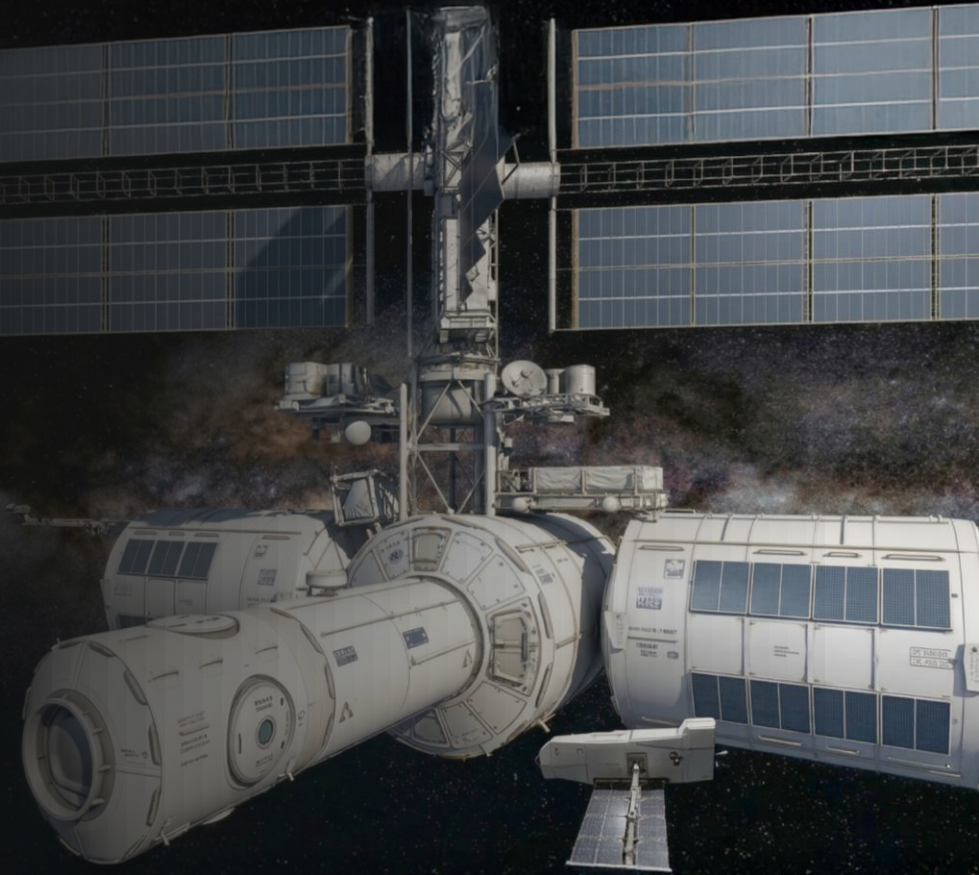
- Battery & Power
- Hull Protection
- Solar Arrays
- Autonomous Flight
- Compliance & Regulations
- Digital Twin Simulations



STARBOUND



SPIRAL BLUE





# SHARE STRUCTURE

Capital Structure (Pre-Financing)

| Shareholders                 | Shares            | Ownership   |
|------------------------------|-------------------|-------------|
| Founders & Core Team         | 11,000,000        | 46.19%      |
| Existing shareholders        | 12,814,721        | 53.81%      |
| <b>TOTAL (Fully diluted)</b> | <b>23,814,721</b> | <b>100%</b> |

Investor capital goes further • **Government Backed 43.5% R&D cash rebate**

Investor capital goes further – Government

Backed 43.5% R&D

cash rebate





# ORBIT ORBIT

[www.orbit2orbit.space](http://www.orbit2orbit.space) | [investors@orbit2orbit.space](mailto:investors@orbit2orbit.space) | +61 432 917 128



# INVESTOR HIGHLIGHTS

## LEADING THE NEXT REQUIRED FRONTIER IN SPACE

### 1. Pioneering

In-space Station-to-station logistics & distribution. No dedicated station-to-station logistics network currently exists.

### 2. Proprietary Technology

Building the infrastructure layer: Orbital Servicing Units (OSU), fuel generation, propulsion, autonomous routing, in-station docking, & in-space integration.

### 3. Strategic Advantage

- Cost efficiency driven by vertical integration, in-house manufacturing, & partnerships
- 2x higher resilience through reusable, adaptable systems
- Flexible mission profiles enabling repeatable operations
- Reduced storage costs via shared cargo flights

### 4. Catalysts

- 40 tonnes/year capacity by 2030
- Geo & lunar logistics expansion
- Data center support
- LOI's accumulating \$10M in revenue.

### 5. Team

- 60+ years combined flight heritage
- 12+ successful missions across the team

### 6. Geography

- Australia's less crowded, - flexible airspace allows companies to launch and iterate up to 10x faster than in traditional aerospace hubs like Florida.





# RECENT M&A ACTIVITY

Consolidation and capital accelerating across the space infrastructure sector



**US\$60B**

**SpaceX → Cursor**

Largest VC backed startup acquisition on record



**~US\$8.0B**

**Rocket Lab → Iridium**

Launch capability plus a global LEO comms network



**US\$925M**

**Redwire → Edge Autonomy**

Space and uncrewed air systems for defence



**C\$920M**

**MDA Space → CLS (70%)**

70% of a French Earth observation analytics leader



**US\$800M**

**Intuitive Machines → Lanteris**

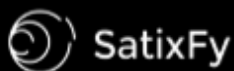
Adds proven satellite manufacturing at scale



**US\$355M\***

**York Space → ALL.SPACE**

Resilient multi orbit ground terminals



**US\$280M**

**MDA Space → SatixFy**

Space grade comms chips brought in house



**US\$128M**

**Azimut → D-Orbit**

Series D lead investment; not a control stake

\*York Space / ALL.SPACE announced at US\$355M; completed July 2026 at approx US\$300M. Values as announced; company disclosures 2025 to 2026.



## Q&A

### What is the Project Vision?

Orbit2Orbit (O2O) is pioneering a reusable, autonomous vehicle for in-orbit cargo movement between orbital platforms. As orbital infrastructure expands, mission success depends on the ability to move, reposition, and recover payloads after launch. Today, this capability does not exist as a persistent, station-to-station logistics system. Payloads are delivered to a single destination with no transfer or reuse. This limits utilisation and increases operational risk. Orbit2Orbit solves this with a vehicle that docks, transfers cargo, and redeploys between platforms. This enables repeatable logistics cycles and reduces reliance on Earth-based resupply. The system is validated through a structured Lab-to-Space program. Modular payloads are flight-tested in near-space before orbital deployment to prove hardware and operations. This is the foundation of a persistent in-orbit logistics layer.

### What is the problem being solved?

Launch cadence, fixed manifests, and pre-defined payload allocation constrain how orbital platforms operate. Existing systems are limited to launch delivery or mission-specific transfer. Once assets are deployed, there is no independent capability to adjust logistics, redeploy capacity, or respond to changing mission needs without committing to another launch. This creates rigidity in mission planning, limits commercial flexibility, and ties revenue generation to launch availability. Without an in-orbit logistics layer, orbital platforms remain dependent on Earth-based resupply cycles to adapt or optimise operations.

### What is the solution Orbit2Orbit is creating?

Orbit2Orbit introduces a reusable, persistent on-orbit logistics vehicle. It enables orbital platforms to transport, deploy, and retrieve payloads, allowing capacity to be adjusted after launch without new missions. The vehicle is designed to interface with future in-station servicing infrastructure, enabling inspection, maintenance, refuelling, and payload exchange as these capabilities mature, this interface is called the Orbital Servicing Unit (OSU). The vehicle can dock and return to station for inspection, maintenance, refuelling, and payload exchange, extending operational life and reducing replacement launches. Development is de-risked through a Lab-to-Space pathway. Standardised systems (SPINE and PHUs) are flight-tested in near-space to validate interfaces and operations before orbital deployment. This enables repeatable logistics cycles, reducing launch dependency and improving utilisation of in-orbit assets.



## Q&A

### What are the user benefits for short term and longer term?

In the short term, Orbit2Orbit provides a structured Lab-to-Space pathway. Standardised payload interfaces (mechanical, electrical, and data) enable consistent integration across multiple form factors. Payloads are flight-tested in near-space environments prior to orbital deployment, reducing development cost, increasing confidence, and validating performance through incremental testing. In the longer term, Orbit2Orbit enables in-orbit logistics. Payloads can be transported, redeployed, serviced, and recovered between platforms without additional launches. This shifts operations from fixed, single-use missions to repeatable logistics cycles, improving utilisation, reducing risk, and lowering dependency on Earth-based resupply.

### What is the market potential?

Orbit2Orbit generates revenue through a staged model aligned with the growth of in-orbit infrastructure. Initial revenue is driven through the Lab-to-Space pathway. Customers access standardised payload integration and flight-tested capacity, reducing complexity and enabling repeatable missions. As operations scale, Orbit2Orbit expands into station support services, providing ongoing access to in-orbit transport, inspection, and operational support. Long term, revenue is driven by cargo logistics between platforms. Customers pay for payload movement, deployment, and return pathways, enabled by a shared, reusable fleet. Value is created by increasing asset utilisation, reducing reliance on launch cycles, and enabling a persistent logistics layer. As orbital infrastructure grows, Orbit2Orbit scales with it.

### What do you see as the major obstacles for implementation?

A key technical challenge is demonstrating safe and repeatable rendezvous, proximity operations, and docking (RPOD) with orbital platforms. Mission 0 is designed to validate controlled vehicle operations and build confidence in this capability. A second challenge is the absence of established policy and governance for vehicles operating between independent orbital platforms, particularly across jurisdictions. Orbit2Orbit is engaging with regulators and agencies as these frameworks emerge. The third challenge is establishing operator trust. Allowing a vehicle to interact with station environments requires proven safety, reliability, and operational discipline, addressed through progressive validation and demonstrated performance.



## Q&A

**What is Lab-to-Space program?** (<https://itif.org/publications/2025/05/27/drug-development-in-microgravity-the-next-frontier-in-biopharmaceutical-innovation/>)

Lab-to-Space is Orbit2Orbit's staged pathway for moving payloads from controlled lab environments into progressively more realistic flight environments before they reach orbit. The pathway starts with standardised payload housing and interface definition on Earth, then progresses through stratospheric flight, suborbital flight, and eventually orbital deployment. Each step increases environmental realism while keeping cost, complexity, and risk lower than jumping straight to orbit. The purpose is not just to "fly experiments." It is to validate payload interfaces, power/data behaviour, environmental response, integration workflow, and customer operations before committing to higher-cost orbital missions. This creates a repeatable commercial pathway for customers: build, test, learn, improve, and then move upward through the flight stack using the same payload architecture. For Orbit2Orbit, Lab-to-Space is also the operational proving ground for SPINE, PHU, customer integration, compliance workflows, telemetry, and mission delivery. It is the on-ramp into the future orbital logistics network.

**How does Orbit2Orbit relate to companies like SpaceX?**

SpaceX has changed the economics of getting mass into orbit. Orbit2Orbit is focused on what happens after that mass is already there. We are not competing with launch providers. We are building the post-launch logistics layer: moving, servicing, redeploying, recovering, and supporting payloads once they are in space. That becomes increasingly important as orbital infrastructure grows. If companies are building commercial stations, lunar delivery capability, orbital platforms, or future space-based compute/data-centre infrastructure, then launch is only the first step. Those assets will still need maintenance, replacement parts, payload swaps, failed hardware recovery, spares movement, inspections, servicing, and logistics between platforms. It does not make commercial sense to send a large launch vehicle every time a small component fails, a payload needs repositioning, or a customer needs hardware moved between orbital locations. A Starship-scale vehicle is excellent for bulk transport from Earth. Orbit2Orbit's role is the smaller, repeatable, in-space movement that makes that infrastructure operational after delivery. In that sense, Orbit2Orbit is complementary to companies like SpaceX. Launch providers open access to space. Orbit2Orbit helps make the assets already in space more useful, serviceable, and commercially productive. The overlap is infrastructure. The difference is layer: SpaceX moves mass from Earth to space; Orbit2Orbit moves and supports assets once they are there.

**What if the space stations are delayed in their timelines?**

Orbit2Orbit's long-term logistics thesis does not depend on every announced commercial station entering service on its current target date. Delays would primarily shift the timing of station-to-station revenue rather than invalidate the market need or the underlying technology. Our development roadmap is staged, with near-term revenue and technical validation generated through Lab2Space, Pathfinder missions, hosted payloads and orbital demonstration activities. Capital-intensive fleet deployment and station-specific infrastructure will be gated against confirmed station schedules, customer agreements and operational demand. A market containing even one or two additional orbital destinations creates an initial addressable logistics opportunity, with the network expanding as further stations enter service.



# SOURCES & REFERENCES

Third party sources supporting quotes, statements and figures in this presentation.

## MARKET & ECONOMIC DATA

- 01** Global space economy to reach US\$1.8 trillion by 2035, up from US\$630 billion in 2023 (approx. 3x growth).  
*World Economic Forum & McKinsey & Company, Space: The \$1.8 Trillion Trillion Opportunity for Global Economic Growth, April 2024.*
- 02** Launch cost per kilogram: US\$54,500 (historical Shuttle era) declining to US\$2,720 (Falcon Heavy); Starship targeting US\$200/kg.  
*NASA Ames Research Center (2018); CSIS Aerospace Security Project. Starship figure is a stated SpaceX target, not yet demonstrated.*
- 03** 2.2 million new crystalline materials discovered by AI, including 380,000 predicted stable; approx. 800 years of equivalent research.  
*Merchant et al., Scaling deep learning for materials discovery, Nature 624, 80 to 85 (2023); Google DeepMind, GNoME project.*
- 04** US\$55.3 billion invested in global space sector in 2025 across 431 companies; Q4 2025 delivered US\$17.0 billion across 135 rounds.  
*Space Capital, Space Investment Quarterly Report, Q4 2025.*
- 05** In space logistics market projected to reach approx. US\$51 billion in the 2030s.  
*Company estimate, derived from WEF/McKinsey 2024 space economy segmentation and BIS Research in orbit logistics forecasts.*
- 06** Approx. 18,000 satellites forecast to be operational by 2030 across commercial LEO constellations.  
*BryceTech Smallsats by the Numbers 2024; Space Foundation State of the Space Report 2024.*

## SEGMENT FORECASTS & PROGRAMS

- 07** In orbit data centre market to reach US\$39.09 billion by 2035, from US\$1.77 billion in 2029 (CAGR approx. 67.4%).  
*BIS Research, In-Orbit Data Centers Market, 2025.*
- 08** US\$1.2 trillion projected total cost of Golden Dome missile defence architecture over 20 years.  
*Congressional Budget Office, Golden Dome for America cost estimate, May 2026.*
- 09** In space manufacturing market projected to approach US\$135 billion by 2040 across pharmaceuticals, materials and semiconductors.  
*McKinsey & Company; Deloitte Space Report 2024; company estimate.*
- 10** NASA Artemis program targeting sustained lunar and cislunar presence by 2030.  
*NASA Artemis Plan, Moon to Mars Architecture, 2024.*
- 11** Space based solar power market expected to grow approx. 5x by 2035 at approx. 17% CAGR.  
*Grand View Research, Space-Based Solar Power Market Analysis, 2024.*
- 12** Announced commercial space stations succeeding ISS: China Space Station (operational); Vast Haven-1 (2027); ROSS (2028); Axiom (2028); Starlab (2029).  
*Operator public disclosures: CMSA, Vast Space, Roscosmos, Axiom Space, Starlab Space LLC; NASA Commercial LEO Destinations program.*

## COMPETITIVE & M&A ACTIVITY

- 13** Competitor market capitalisations: Space Machines US\$120M; D-Orbit US\$1.3B; Portal Space US\$250M; Impulse Space US\$1.79B.  
*Publicly disclosed funding rounds and post money valuations, 2024 to 2026.*
- 14** SpaceX acquisition of Cursor: US\$60 billion (largest VC backed startup acquisition on record).  
*Company press disclosures, 2026.*
- 15** Rocket Lab acquisition of Iridium: approx. US\$8.0 billion.  
*Company announcement, 2026.*
- 16** Redwire acquisition of Edge Autonomy: US\$925M. Intuitive Machines acquisition of Lanteris: US\$800M.  
*SEC filings and company disclosures, 2025 to 2026.*
- 17** MDA Space acquisition of CLS (70%): C\$920M. MDA Space acquisition of SatixFy: US\$280M.  
*TSX disclosures and company announcements, 2025 to 2026.*
- 18** York Space acquisition of ALL.SPACE: US\$355M announced, closed at approx. US\$300M in July 2026.  
*Company announcements, 2025 to 2026.*
- 19** Azimut lead investment in D-Orbit: US\$128M Series D (not a control stake).  
*Company announcement, 2025.*