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ANALYSIS OF THE COMMERCIAL SATELLITE INDUSTRY

Abstract

This paper summarizes the 2015 version of an annual study conducted by The Tauri Group for the Satellite Industry Association: the State of the Satellite Industry Report. The 2015 version is the 18th edition of the study. The purpose of the study is to provide objective measures of the satellite industry to aid communications with policy makers, regulators, legislators, investors, and other industry stakeholders.

The Tauri Group conducted a survey of over 80 companies, including all members of the Satellite Industry Association, and supplemented this data with open source market research and financial analysis. The result is the most accurate available assessment of the global satellite industry and trends within.

The study results show revenues from satellite companies across the value chain, including launch, satellite manufacturing, ground equipment, and satellite services. Within each of these elements, the study analyzes overall revenue, growth, growth within markets, and geographic distribution, and discusses trends. This paper covers data from 2009 through 2014 and shows changes over this period.

The study also compares U.S. versus international shares of the global satellite industry. It will focus on the satellite manufacturing and launch industry segments, as well as any trends. Revenues and orders offer the most insight on international dynamics.

In the 2014 edition, the study revealed satellite industry revenue of \$195.2 billion in 2013 and overall industry growth of three percent worldwide. Growth slowed from seven percent in 2012. Three of the four satellite industry segments posted growth: satellite services grew by three percent, satellite manufacturing grew by eight percent, and ground equipment grew by one percent. Launch segment revenues decreased by seven percent.

Each industry segment is comprised of unique components. Among satellite services, the results describe markets for television, radio, broadband, fixed satellite services, mobile satellite services, and remote sensing. The launch industry segments include revenues by country. The market for ground equipment includes data on network equipment, satellite navigation equipment, and satellite broadcast equipment. Satellite manufacturing data includes analysis by spacecraft type, country of manufacturer, and analysis of the market for GEO satellites.