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The Demand Side of the Space Economic Equation: Understanding and Evaluating the Changing Market
Dynamics in Space Activities (3)

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ANALYSIS OF THE COMMERCIAL SATELLITE INDUSTRY

Abstract

This paper summarizes the 2017 version of an annual study conducted by Bryce Space and Technology for the Satellite Industry Association: the State of the Satellite Industry Report. The 2017 version is the 20th 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. Bryce Space and Technology conducted a survey of over 80 companies, including all members of the Satellite Industry Association, and supplemented the survey results with unique data sets, including proprietary surveys, in-depth public information, and independent 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 satellite services, satellite manufacturing, launch, and ground equipment. 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 2011 through 2016 and shows changes over this period. Key figures include charts and tables depicting annual results and changes from year to year. 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 2016 edition, the study revealed satellite industry revenue of \$208 billion in 2015 and overall industry growth of three percent worldwide. Growth decreased from four percent in 2014. Three of the four satellite industry segments posted growth: satellite services grew by four percent, satellite manufacturing grew by four percent, and ground equipment grew by one percent. Meanwhile, the launch industry decreased by nine 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 Earth observation services. Satellite manufacturing data includes analysis by mission type, geographic region of manufacturer, and analysis of the market for GEO satellites. The launch industry segments include revenues by geographic region. The market for ground equipment includes data on network equipment, satellite navigation equipment, and satellite broadcast equipment.

Key figures include charts and tables depicting annual results and changes from year to year for each industry segment.