



2019 State of the Satellite Industry

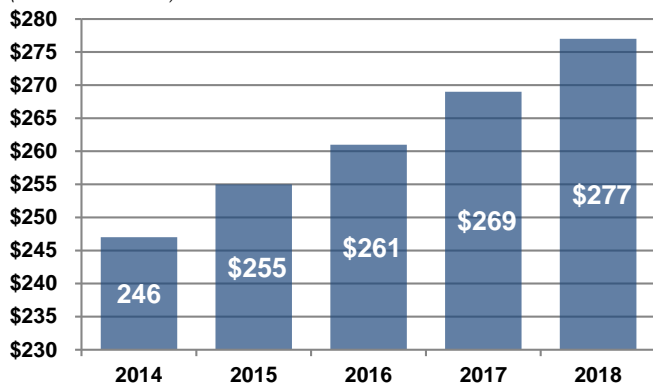
2018 Growth

Satellite manufacturing and launch

Markets for value-added services across multiple segments

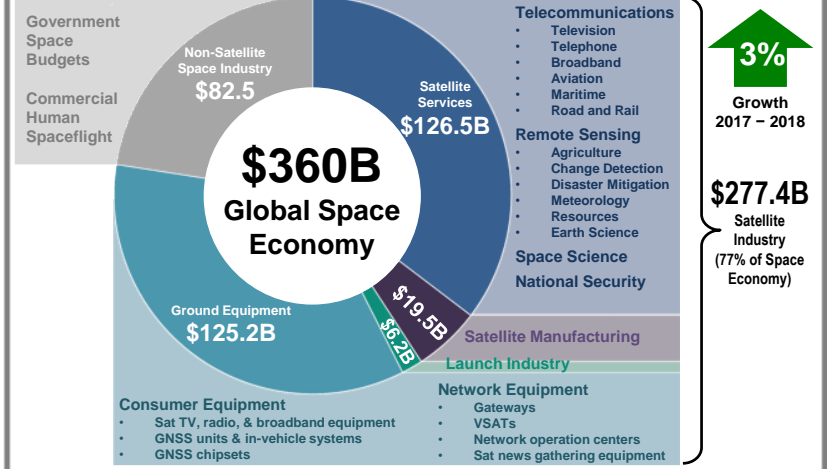
Global Satellite Industry Revenues

(billions of U.S. dollars)



The Satellite Industry in Context

(2018 revenues worldwide, in billions of U.S. dollars)



Satellite Services **1.7%**

2018 Revenues **\$126.5B**

Television	\$94.2B
Radio	\$5.8B
Broadband	\$2.4B
Fixed	\$17.9B
Mobile	\$4.1B
Remote Sensing	\$2.1B

Satellite Manufacturing **26%**

2018 Revenues **\$19.5B**

World: \$8B, U.S.: \$11.5B

314 Satellites launched in 2018 (Included in study)

Mission Type	Percentage
Commercial Communications	22%
Remote Sensing	39%
R&D	18%
Navigation	8%
Other (1%)	1%
Military Surveillance	6%
Scientific	4%
Civil/Military Communications	4%

Satellites Launched by Mission Type

Launch Industry **34%**

2018 Revenues **\$6.2B**

93 Commercially procured launches*

- U.S.: \$2.3B (37%)
- Non-U.S.: \$3.9B (63%)

Commercial Launch Revenues by Region

* There were 114 total orbital launches in 2018. Of these, 93 were commercially procured, 15 involved space vehicles, and 6 were not commercially procured

Ground Equipment **5%**

2018 Revenues **\$125.2B**

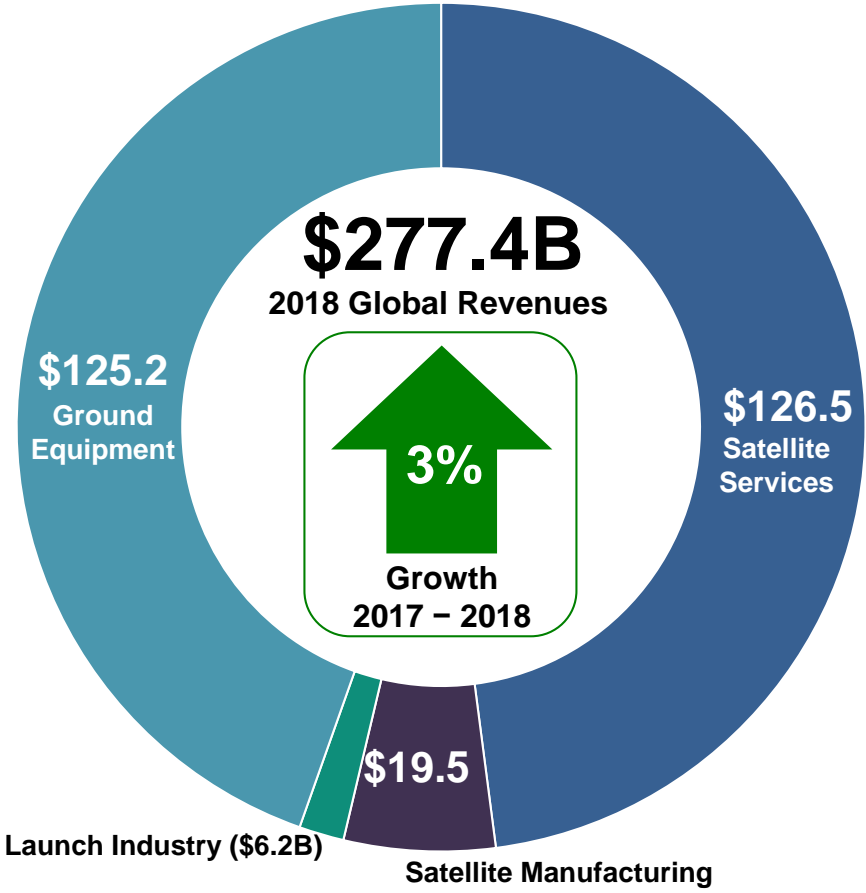
\$18.1B Consumer Equipment

\$93.3B GNSS Equipment

\$13.8B Network Equipment (VSATs, gateways, etc.)



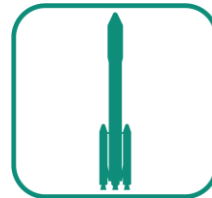
2019 Top-Level Global Satellite Industry Findings



Satellite services, the largest segment; growth in value-added mobile and broadband markets ranging 3% – 12%; 1.7% overall decrease, reflecting the satellite TV and transponder leasing markets



Satellite manufacturing revenues increased by 26%; several high value intelligence and military satellites launched in the U.S. and abroad



Launch industry revenues increased by 34%; record number of commercially procured launches worldwide



Ground equipment revenues increased by 5%; growth in GNSS markets and network equipment, flat or somewhat decreasing consumer equipment revenues

For more information on the satellite industry, or for previous SSIR reports, contact SIA:

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