



## SPACE PLATFORMS & HYPERSONIC TECHNOLOGIES

Govini

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Sciences & technologies

Darpa's XS-1 space

**Since the last launch by the Space Shuttle program in July 2011, the Space Platforms and Hypersonic Technologies markets have been in transition as stakeholders vie to accomplish a wide array of missions. The Federal government helped shape these markets by leveraging contracts for specific missions and capabilities as well as issuing grants to augment and advance technological capabilities. Private enterprise and academic consortia used these to help power their research and deliver new products. Each contributed to the robust and evolving Space Platforms and Hypersonic Technologies markets today.**

**This analytic report explores the market trends and competitive landscape within the \$83.0 billion Space Platforms and Hypersonic Technologies markets from FY11 through FY17. It includes a proprietary dataset of unclassified Federal contract obligations from this time period that is organized into a clear taxonomical structure. The structure was defined by examining multiple data sets across current and past Space and Hypersonic Technologies missions. Grants and international patents data were also analyzed to better understand the nature of core science and research within these markets.**

----- TRANSLATION OF INTRODUCTORY REMARKS -----

Since the last launch of the Space Shuttle program in July 2011, the markets for space platforms and hypersonic technologies are in transition as stakeholders strive to accomplish a wide range of missions. The federal government has helped shape these markets by leveraging contracts for specific missions and capabilities, and by providing grants to increase and advance technological capabilities. Private companies and university consortia have used these contracts to fuel their research and deliver new products. Each has contributed to the robustness and evolution of the space platform and hypersonic technology markets.

This analytical report explores market trends and the competitive landscape within the \$83.0 billion space platform and hypersonic technology markets from fiscal 2011 to fiscal 2017. It includes a proprietary data set of unclassified federal contractual obligations for this period, which is organized in a clear taxonomic structure. The structure was defined by examining multiple data sets from current and past space missions and hypersonic technologies. Data on international grants and patents were also analyzed to better understand the nature of basic science and research within these markets.

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#### Key Findings:

Federal contract obligations for Space Platforms and Hypersonics totaled \$83 billion and collectively grew at a 5.7 percent CAGR from FY11 through FY17

Lockheed Martin (18.2 percent), United Launch Alliance (ULA) - a joint venture between Lockheed Martin and Boeing - (17.6 percent), and Boeing (14.3 percent) captured more than half of all Space Platforms and Hypersonic Technologies contract obligations.

Launch Vehicles market spending was 36 percent of all Space Platforms and Hypersonic Technologies spending from FY11 through FY17 and accounted for \$29.9 billion of the total market

The largest market sub-segment was Medium-Lift Launch Vehicles, which accounted for 18.4 percent of all spending from FY11 through FY17, and the fastest growing market sub-segment was Advanced Development in the Hypersonics Technologies market with a 66.4 percent CAGR

The Sounding Rockets & Small-Lift and Small Satellites market sub-segments grew by 50 percent and 30 percent CAGRs respectively, reflecting the increased interest in small-sized Space and lift technologies.

Five new companies became top-15 vendors between FY11 and FY17, SpaceX, United Technologies, Harris, SGT, and Raytheon

Larger more mature markets, such as Launch Vehicles and Human Space Missions, tend to be more concentrated among the top vendors, which is indicative of barriers to entry, how mature the market is, and where within the product development lifecycle dependent components reside.

NASA and Air Force were the primary funding agencies for the Space Platforms and Hypersonic Technologies markets

Global stakeholders are filing more Space Platforms and Hypersonic Technologies patent

applications to protect their intellectual property (IP) in China, which suggests the country's markets are growing in importance

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