



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 consortiums 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.

----- TRADUCTION DE DES PROPOS INTRODUCTIFS -----

Depuis le dernier lancement du programme de la navette spatiale en juillet 2011, les marchés des plates-formes spatiales et des technologies hypersoniques sont en transition alors que les intervenants s'efforcent d'accomplir un large éventail de missions. Le gouvernement fédéral a contribué à façonner ces marchés en tirant parti des contrats pour des missions et des capacités spécifiques ainsi qu'en accordant des subventions pour accroître et faire progresser les capacités technologiques. Les entreprises privées et les consortiums universitaires s'en sont servis pour alimenter leur recherche et offrir de nouveaux produits. Chacun d'entre eux a contribué à la robustesse et à l'évolution des marchés des plates-formes spatiales et des technologies hypersoniques.

Ce rapport analytique explore les tendances du marché et le paysage concurrentiel au sein des marchés des plates-formes spatiales et des technologies hypersoniques de 83,0 milliards de dollars de l'exercice 2011 à l'exercice 2017. Il comprend un ensemble de données exclusives sur les obligations contractuelles fédérales non classifiées de cette période, qui est organisé en une structure taxonomique claire. La structure a été définie en examinant de multiples ensembles de données dans le cadre de missions spatiales et de technologies hypersoniques actuelles et passées. Les données sur les subventions et les brevets internationaux ont également été analysées afin de mieux comprendre la nature de la science et de la recherche de base au sein de ces marchés.

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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