



**Federal Aviation
Administration**

2009 Commercial Space Transportation Forecast for Non-Geosynchronous Orbits

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AGENDA

- Market Description
- Methodology
- Satellite/Payload Demand Forecast
- Launch Demand Forecast
- Trends
- Conclusions



Market Description

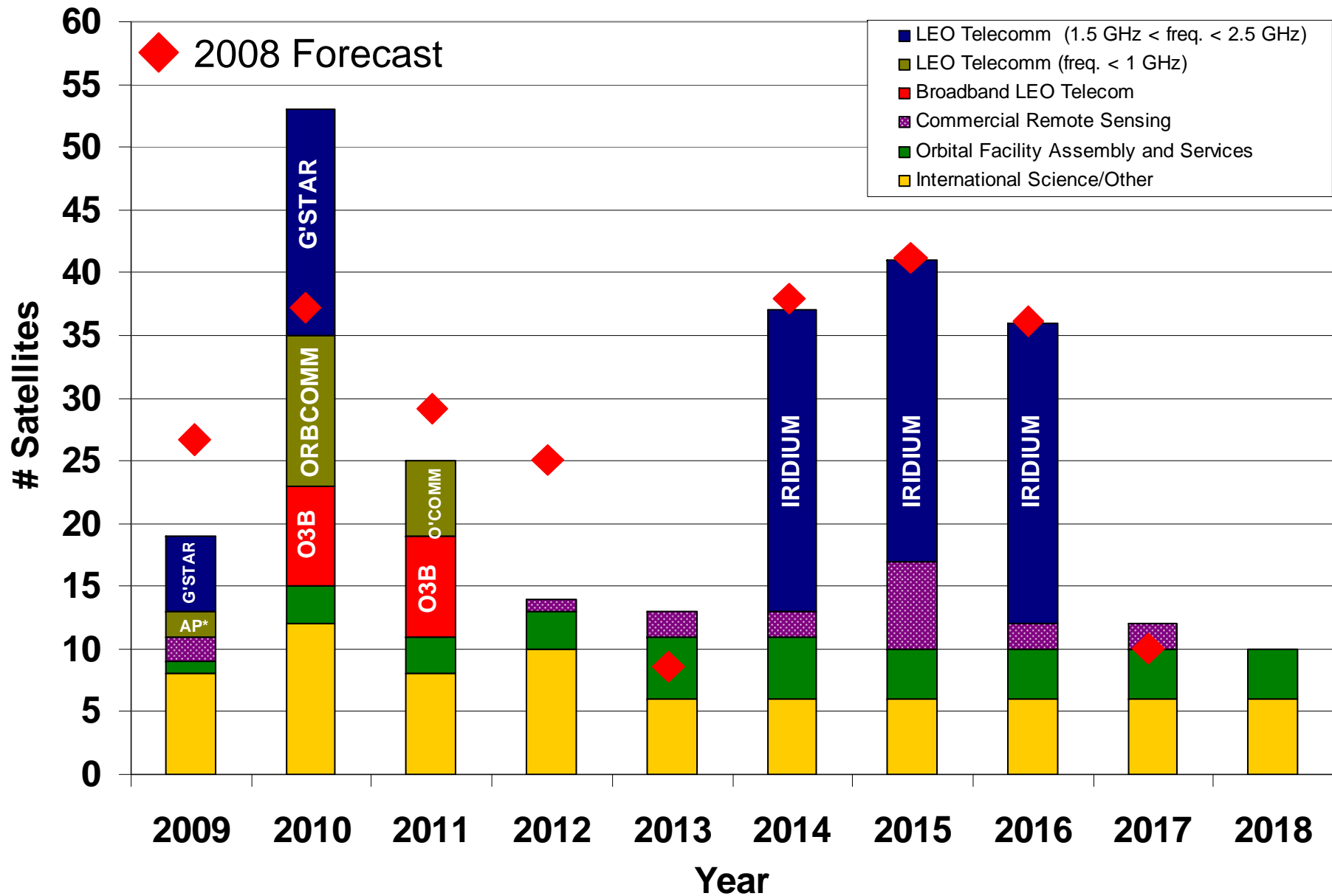
- Satellite Manufacturers
 - Swedish Space Corp., Orbital Sciences, MDA, Thales Alenia, et. al.
- Satellite Operators
 - Globalstar, Iridium, ORBCOMM Global, Aprize, O3b, RapidEye, InfoTerra, GeoEye, DigitalGlobe, et. al.
- Launch Vehicles
 - Delta 2, Falcon 1/1e, Rockot, Soyuz 2, Dnepr, Falcon 9, Zenit 3SL, Taurus II, et. al.

Methodology

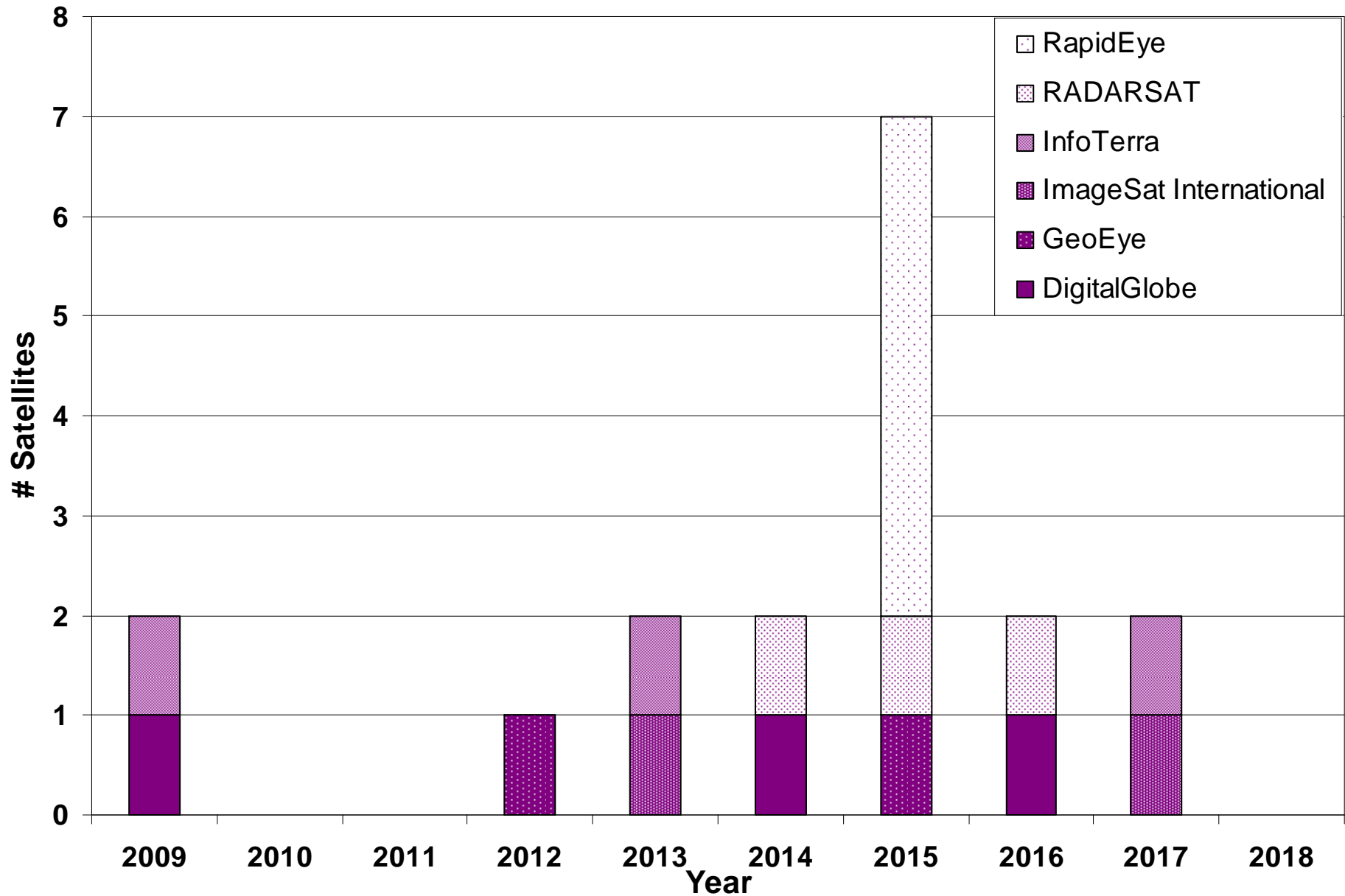
- Data Collection
 - Performed by Futron (Under Contract)
 - Public Sources
 - Direct Communication w/Companies
- Synthesis
 - Tabulate Demand By Est. Launch Year
- Report Reviewed by Industry, Government
- Definition of “Commercial Launch”
 - Internationally Competed and/or
FAA licensed



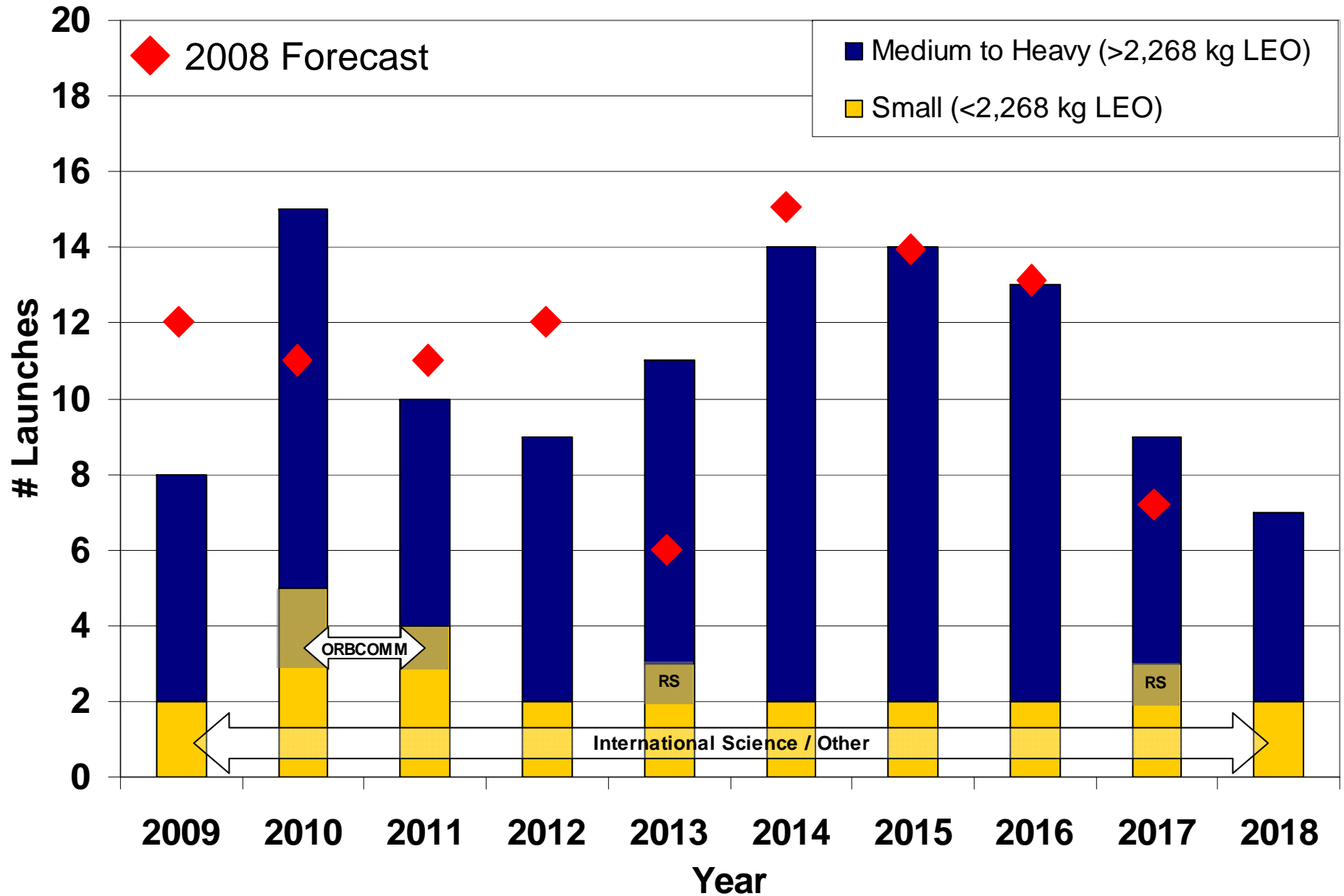
Satellite/Payload Demand Forecast



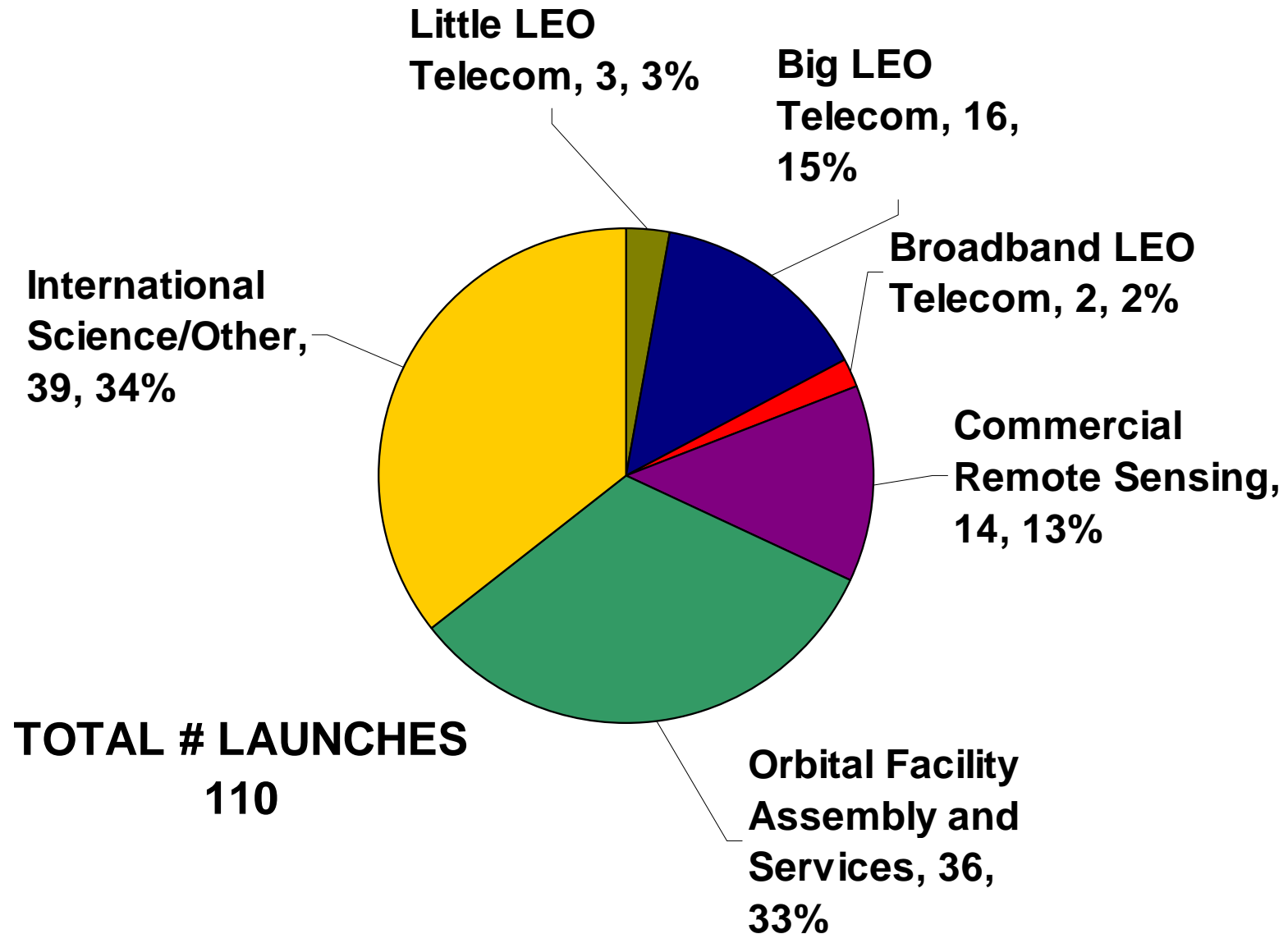
Remote Sensing Demand Forecast



Launch Demand Forecast



2009-2018 Launch Forecast by Industry Sector



Comparison to 2008 NGSO Forecast

Parameter	2008 Forecast (2008-2017)	2009 Forecast (2009-2018)
# Sats/Payloads	276	260
# Small Launches	31	27
# Mid-Heavy Launches	81	83
Total # Launches	112	110

NGSO Conclusions

- Long-Term Market Mostly Government
 - 67% is Stable Gov't Demand
 - 33% is Private Demand: 11 Companies (5 Telecom, 6 Remote Sensing)
- Stable Components of Launch Demand
 - Sat/Payload Demand Down Slightly
 - International Science/Other = 2 Small + 1 Medium Launch / Year
 - OFAC = 4 Medium Launch / Year

The Forecast Report...

- Currently In Final Production
- Available Soon at ast.faa.gov
- For Personalized Service...
 - Send an Email to ken.davidian@faa.gov
 - Give Me Your Business Card
 - Write “Forecast” on the back

