



U.S. Space Industry 'Deep Dive' Assessment

Perceptions of Potential Loss of Viability/Solvency

Preliminary Findings from the Second Waypoint

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January 18, 2013

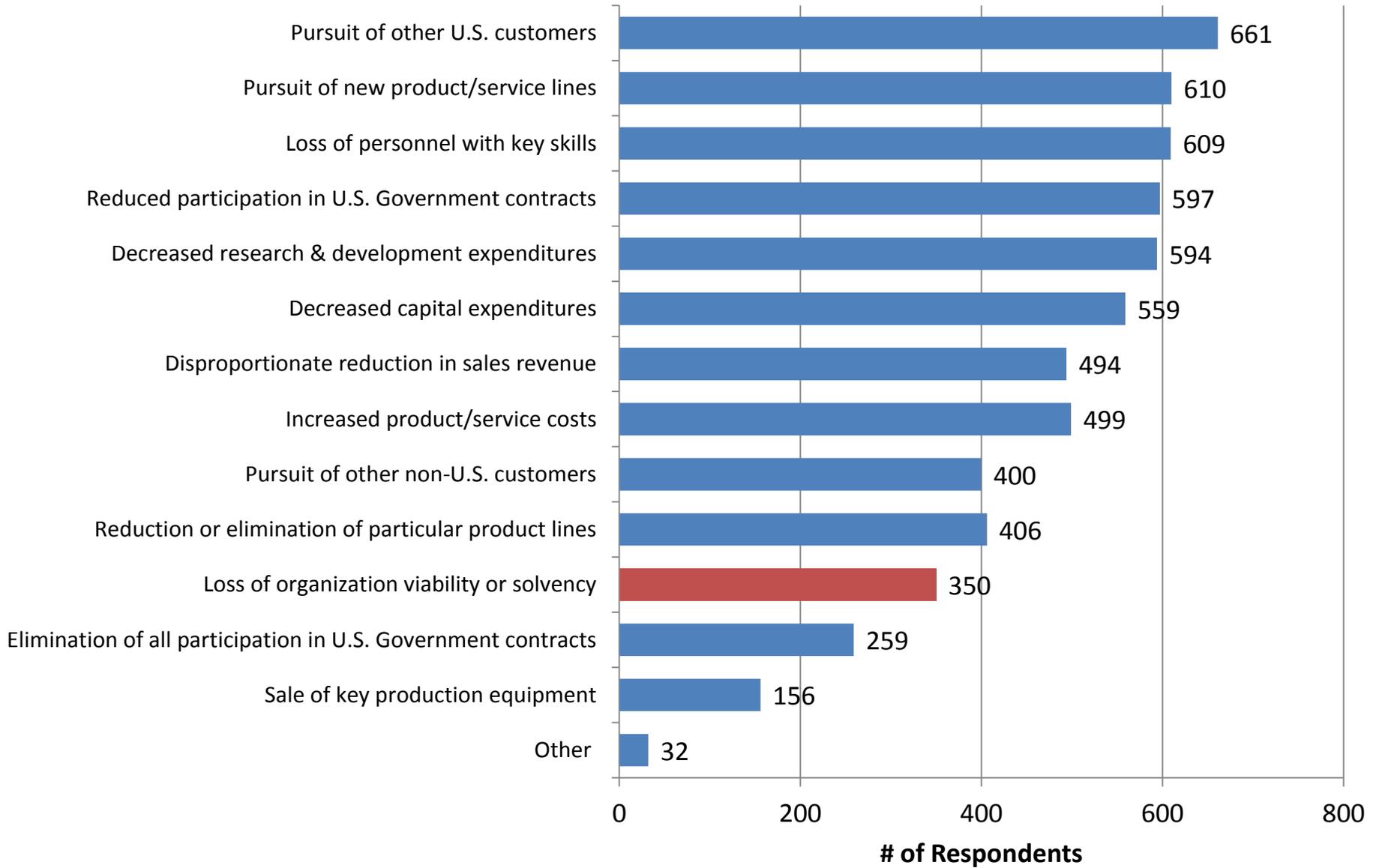
Introduction

In Section 11.a of the survey, respondents were asked to “Select the potential impacts that a sudden decrease in direct and/or indirect U.S. Government **space-related** demand would have on your organization” from a list of provided options.

One of the most negative potential impacts was “loss of organization viability or solvency.”

This presentation provides a profile of the 350 respondents that selected this potential negative impact.

Potential Impacts of a Sudden Decrease in USG Space-Related Demand

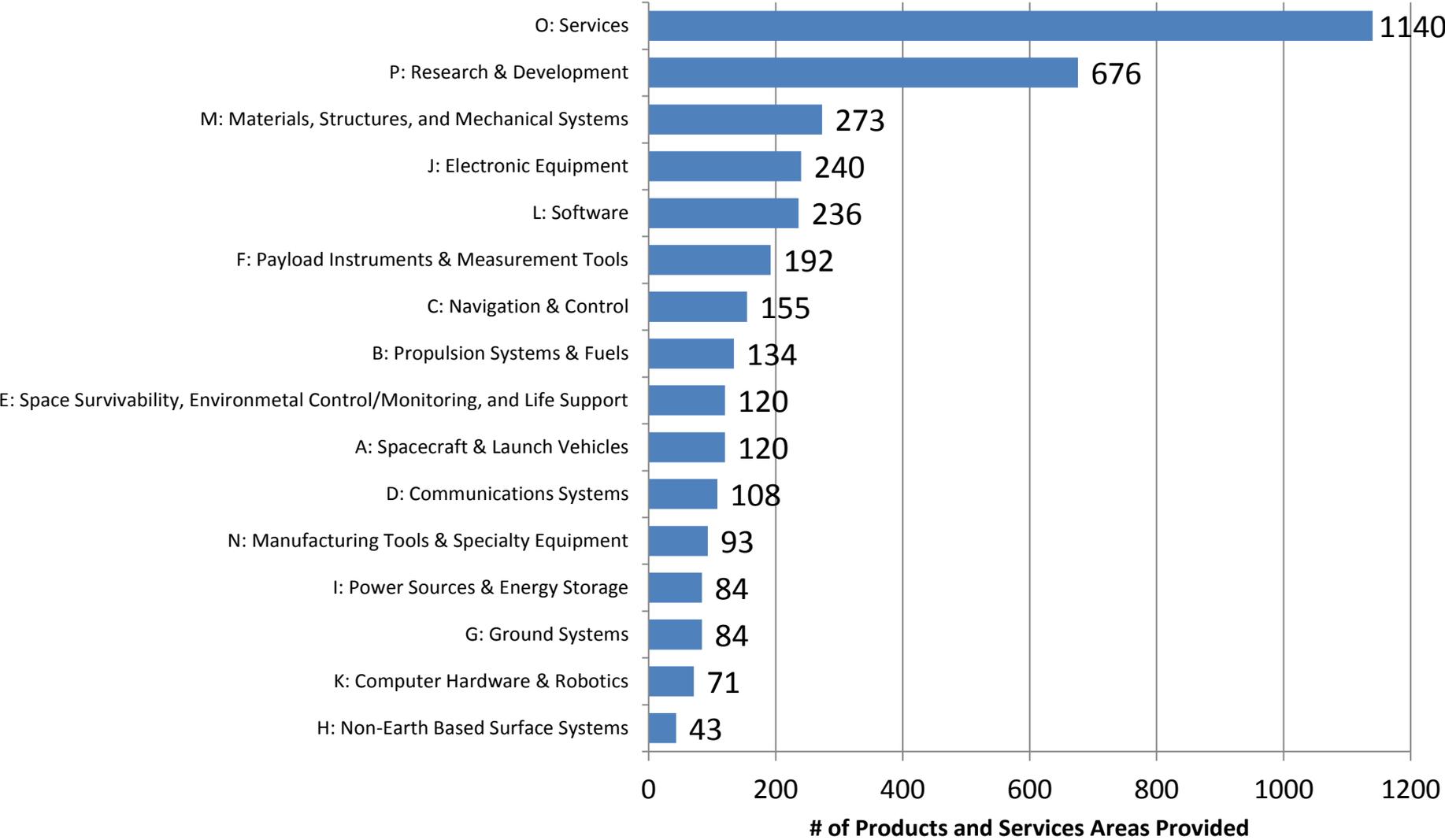


Potential Loss of Viability or Solvency Due to Sudden Decrease in USG Space-Related Demand

Second Waypoint Respondents by Average Annual Net Sales (2009-2012)	
Very Small (Less than \$10M)	204
Small (\$10 – 50M)	65
Medium (\$50 – 250M)	33
Large (\$250M – 1B)	16
Very Large (Greater than \$1B)	9
No Sales	23
Total	350

251 of these respondents are small businesses, as defined by the Small Business Administration

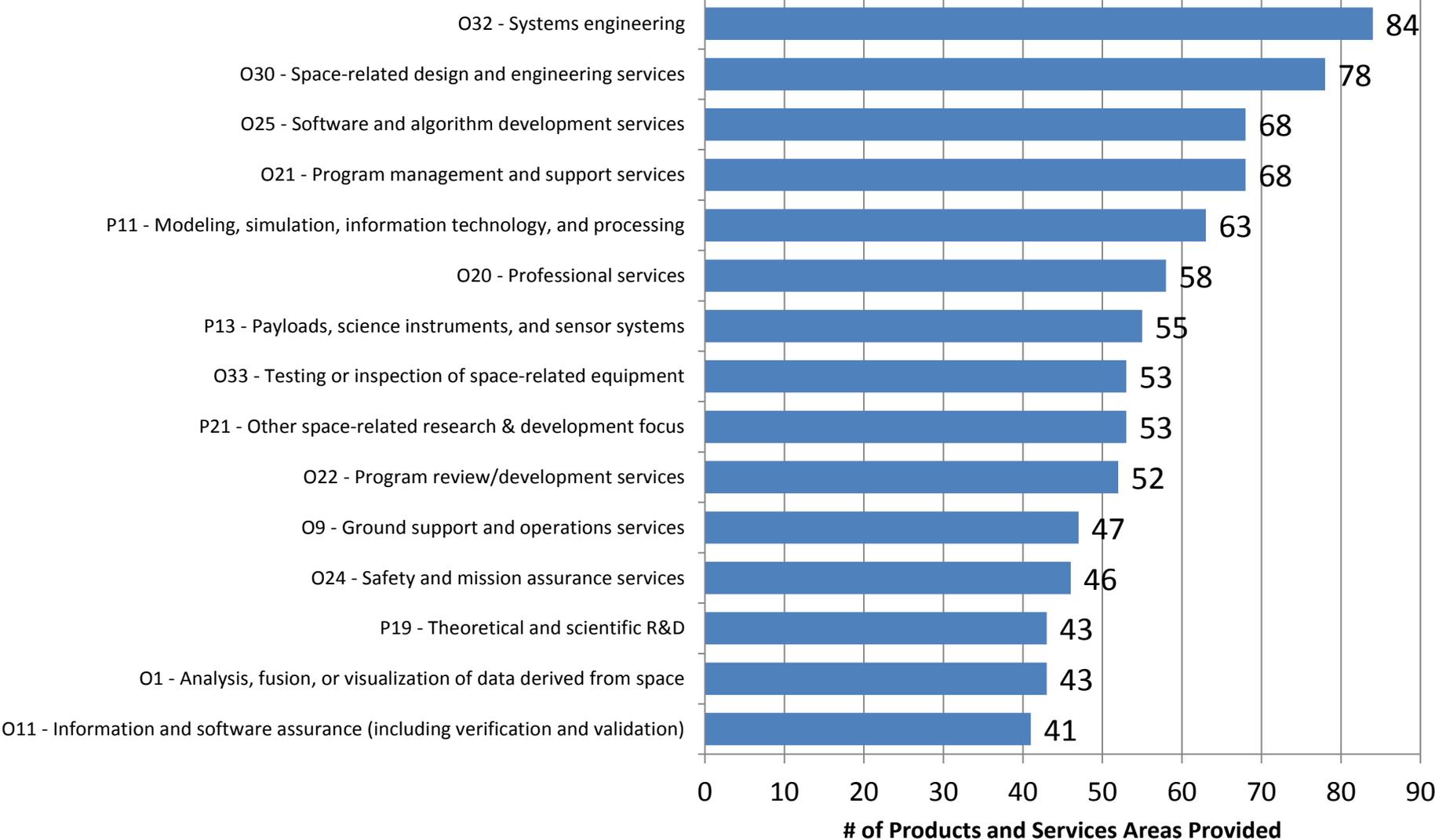
Products and Services Provided by Segment*



* Based on the 350 respondents indicating potential loss of viability or solvency

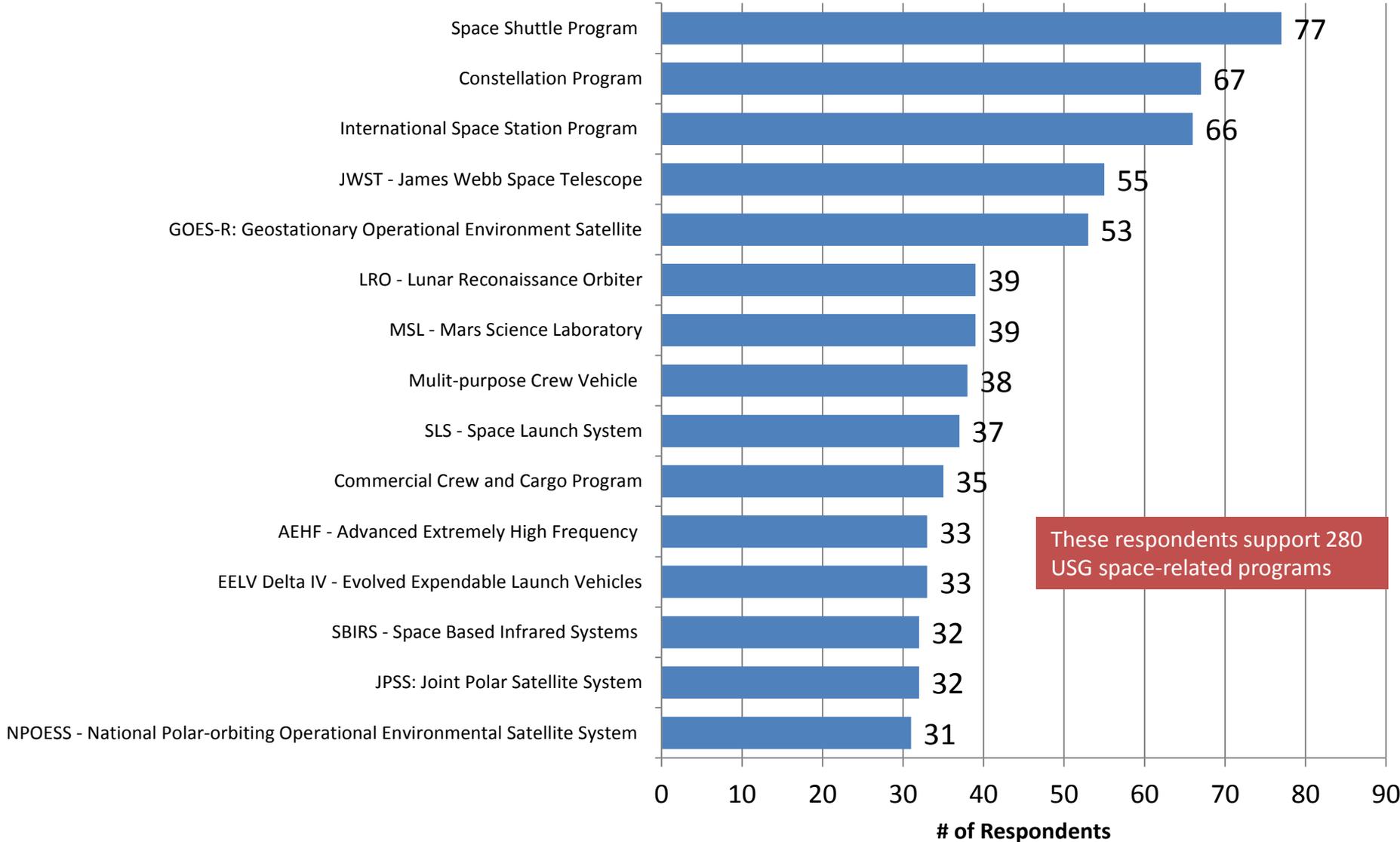
Top 15 Product/Service Areas Provided by Respondents*

– All Segments



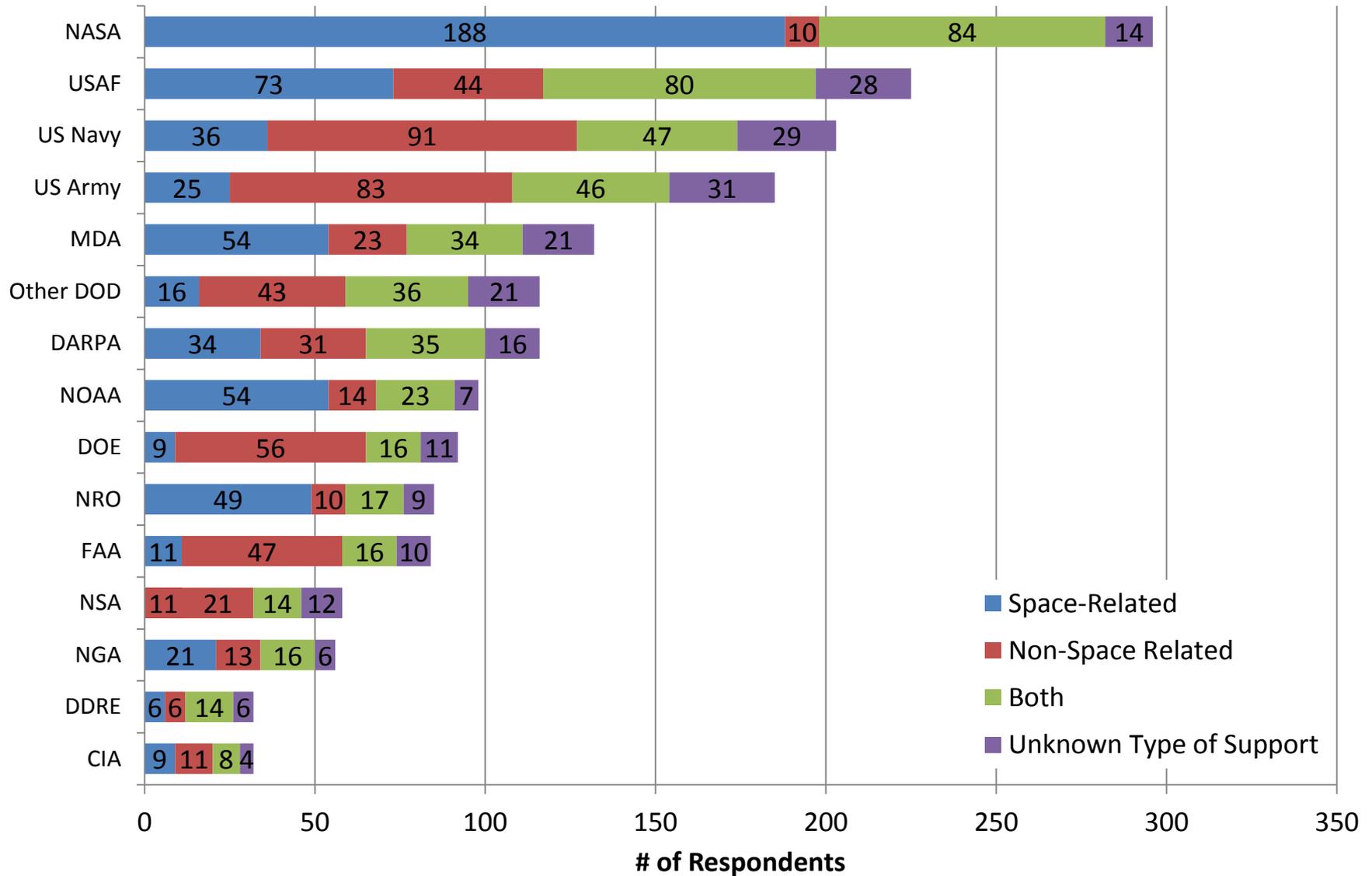
* Based on the 350 respondents indicating potential loss of viability or solvency

Top 15 USG Space Programs Supported by At Risk Respondents



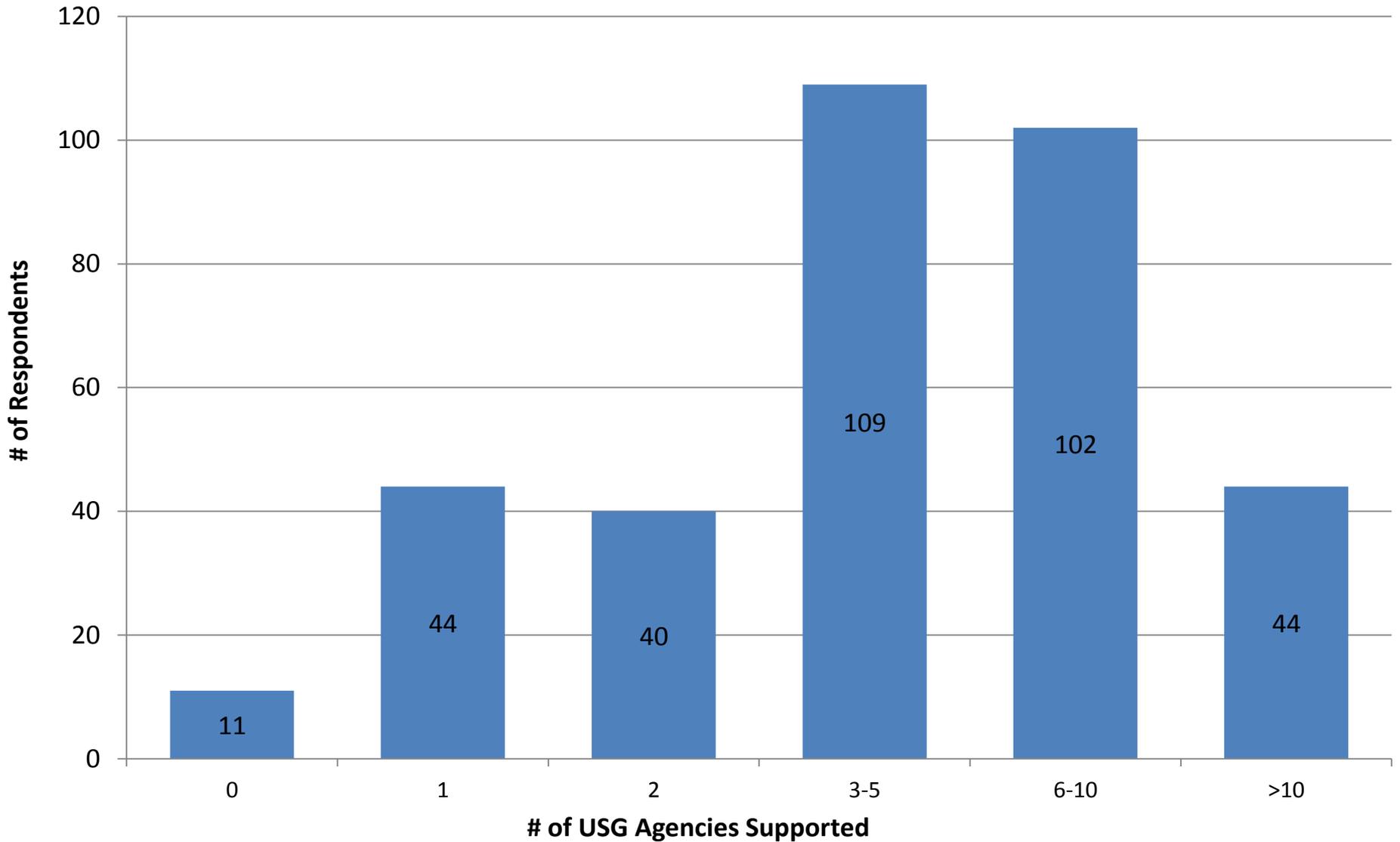
* Based on the 350 respondents indicating potential loss of viability or solvency

Support for U.S. Government Agencies*



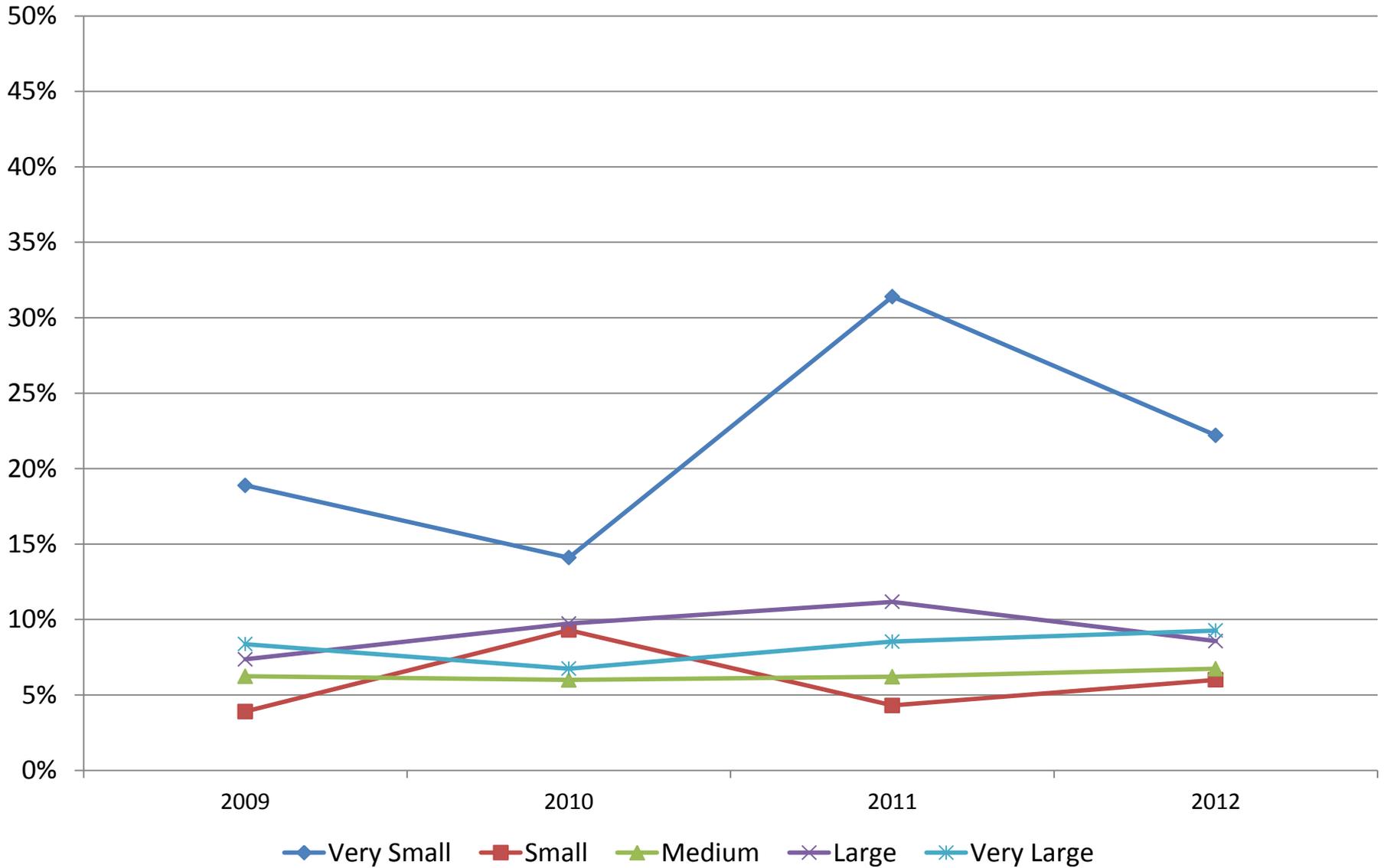
* Based on the 350 respondents indicating potential loss of viability or solvency

At Risk Respondents Supporting Multiple USG Agencies*



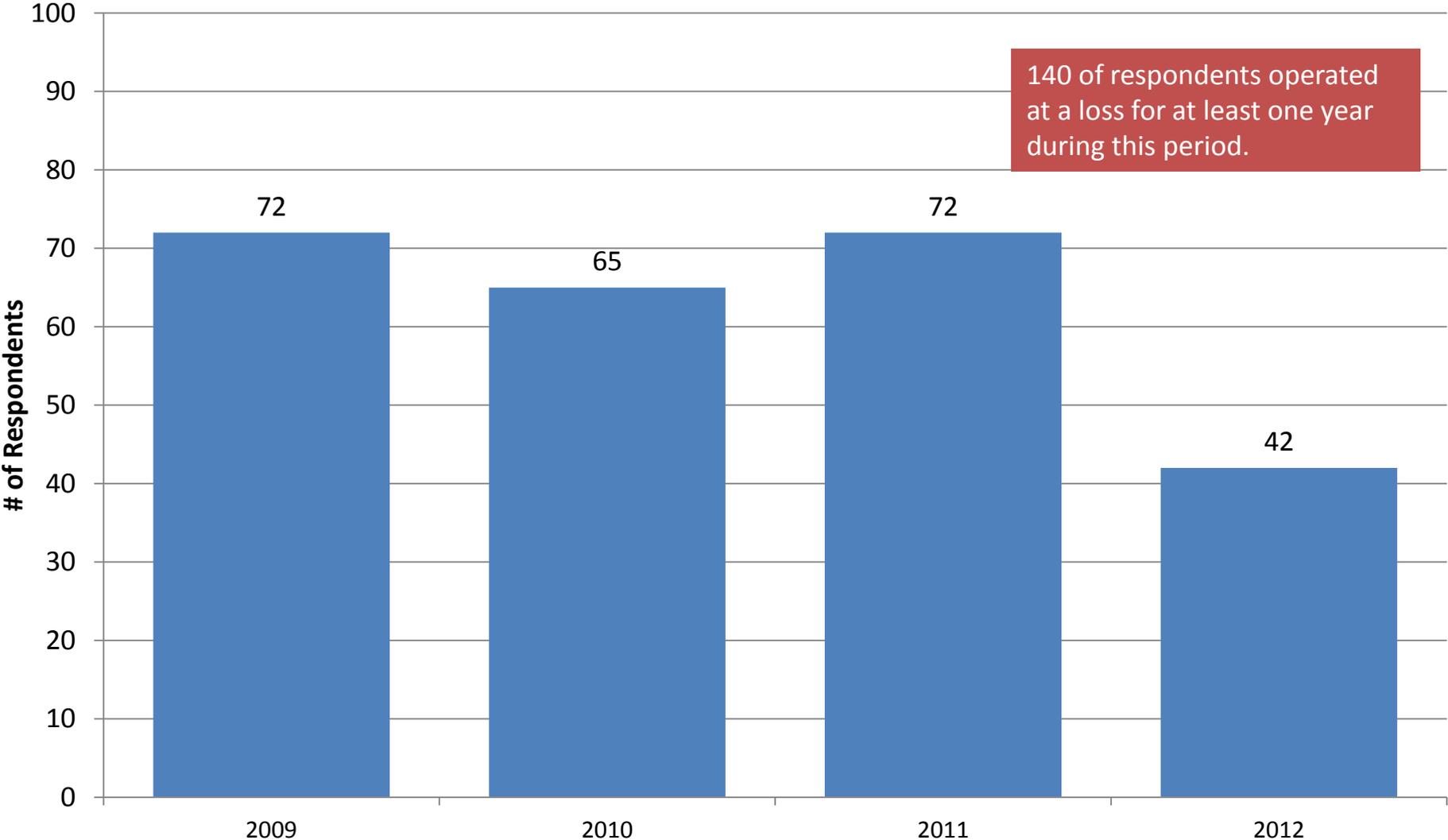
* Based on any type of support provided by the 350 respondents indicating potential loss of viability or solvency

Net Profit Margin By Respondent Size*



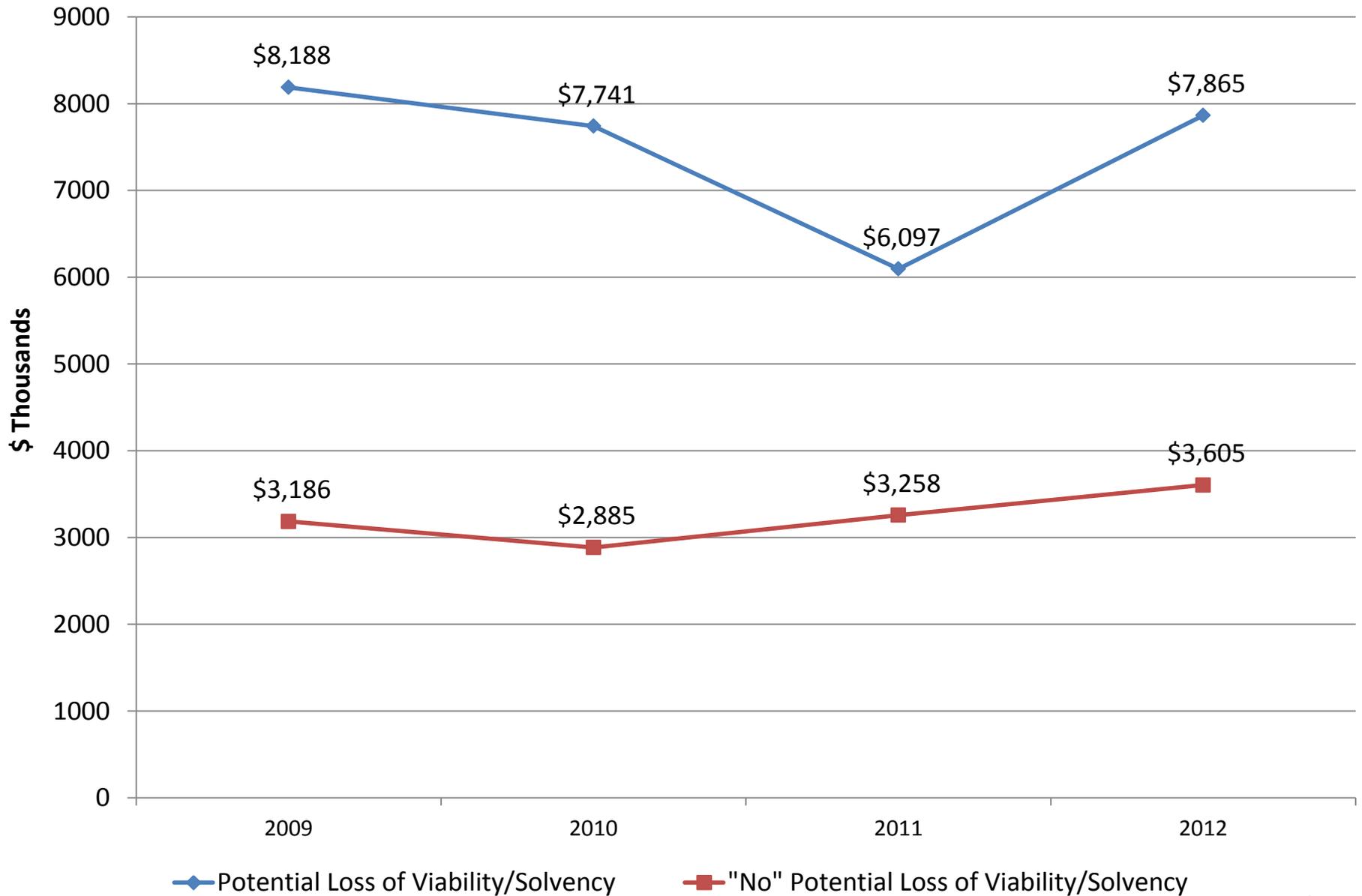
* Based on 321 respondents that indicated potential loss of viability or solvency and provided financial information.

Respondents Operating at a Loss*

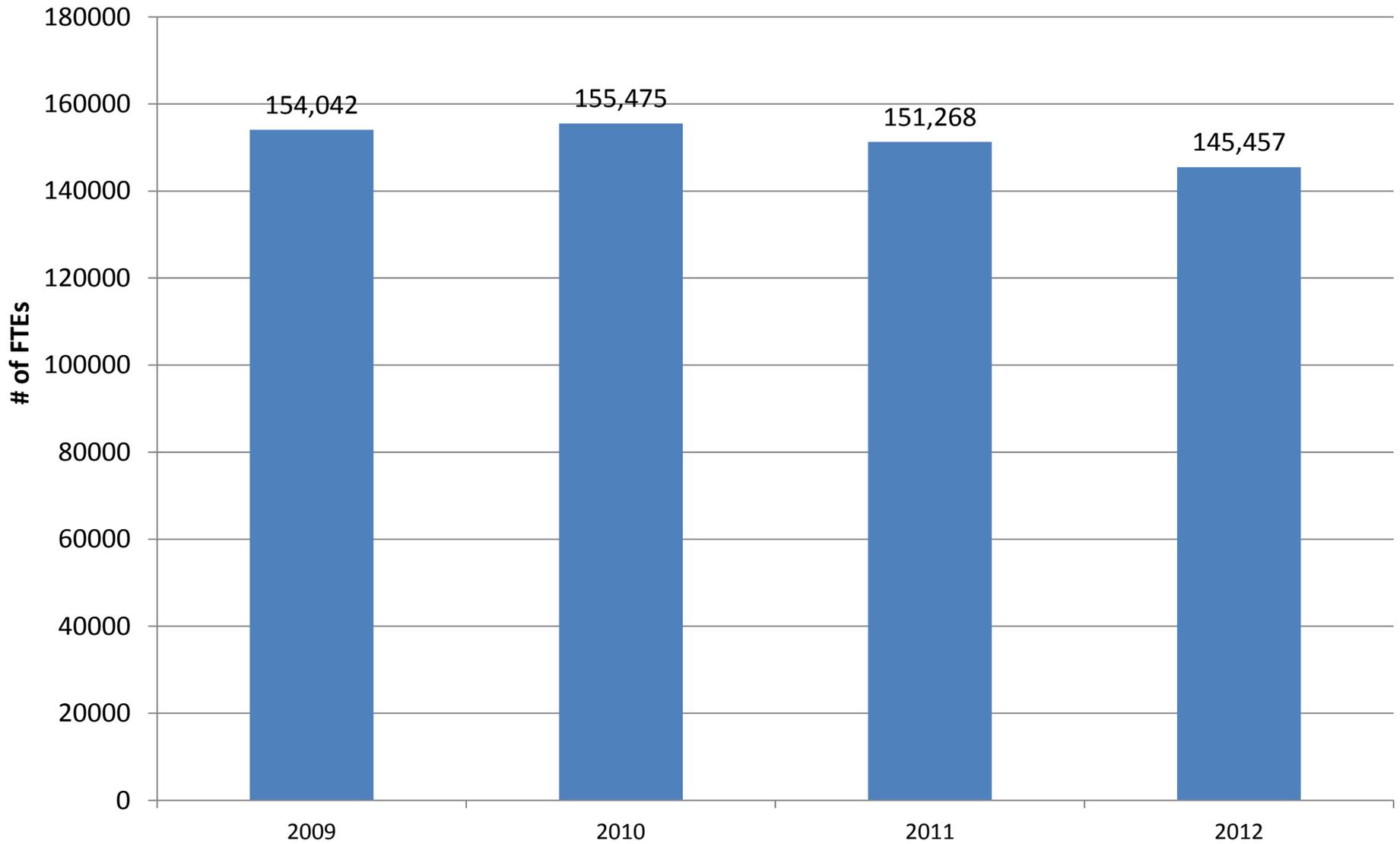


* Based on 322 respondents that indicated potential loss of viability or solvency and provided financial information.

Space-Related R&D Expenditures

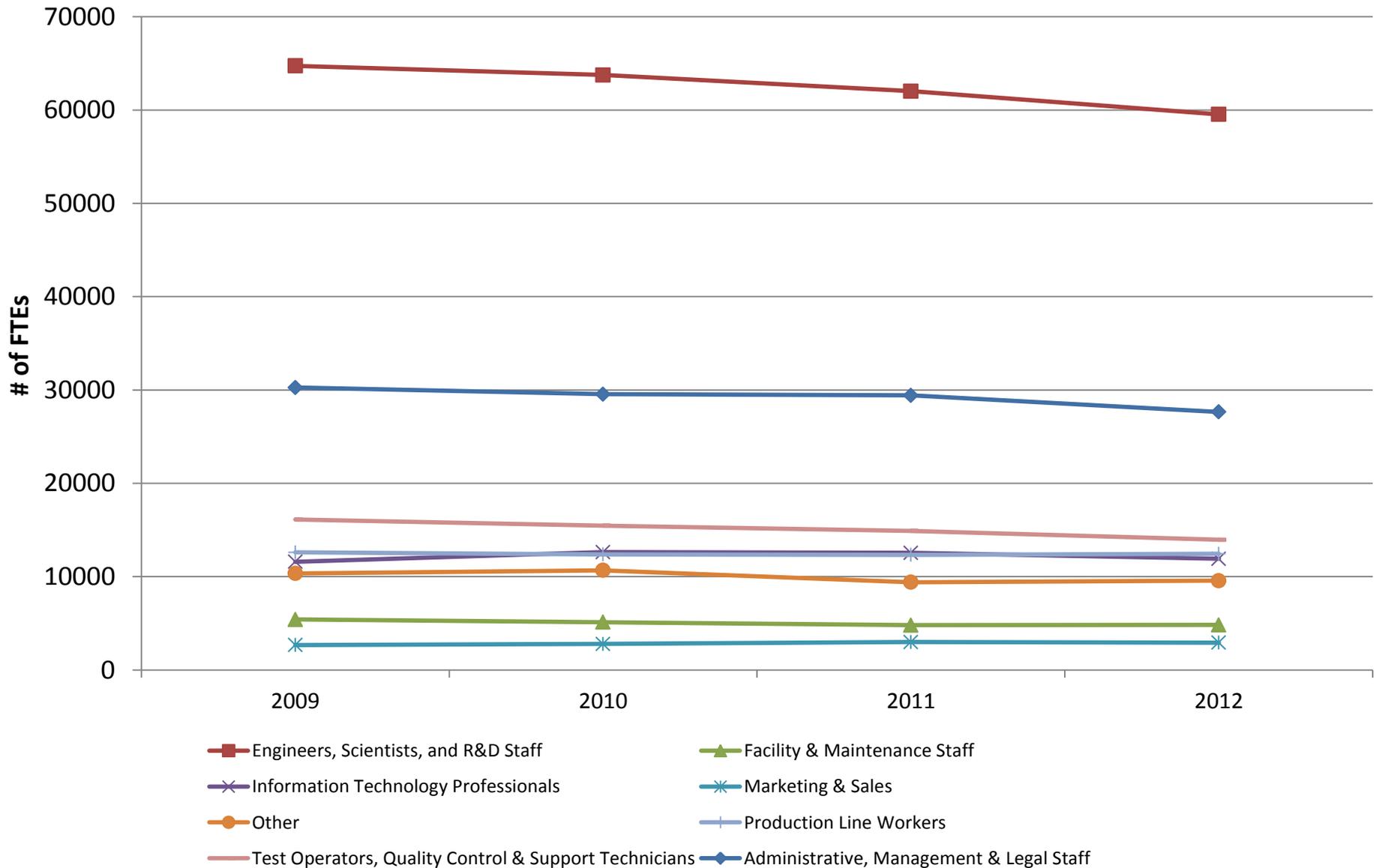


FTEs at Respondents with Potential for Loss of Viability/Solvency*



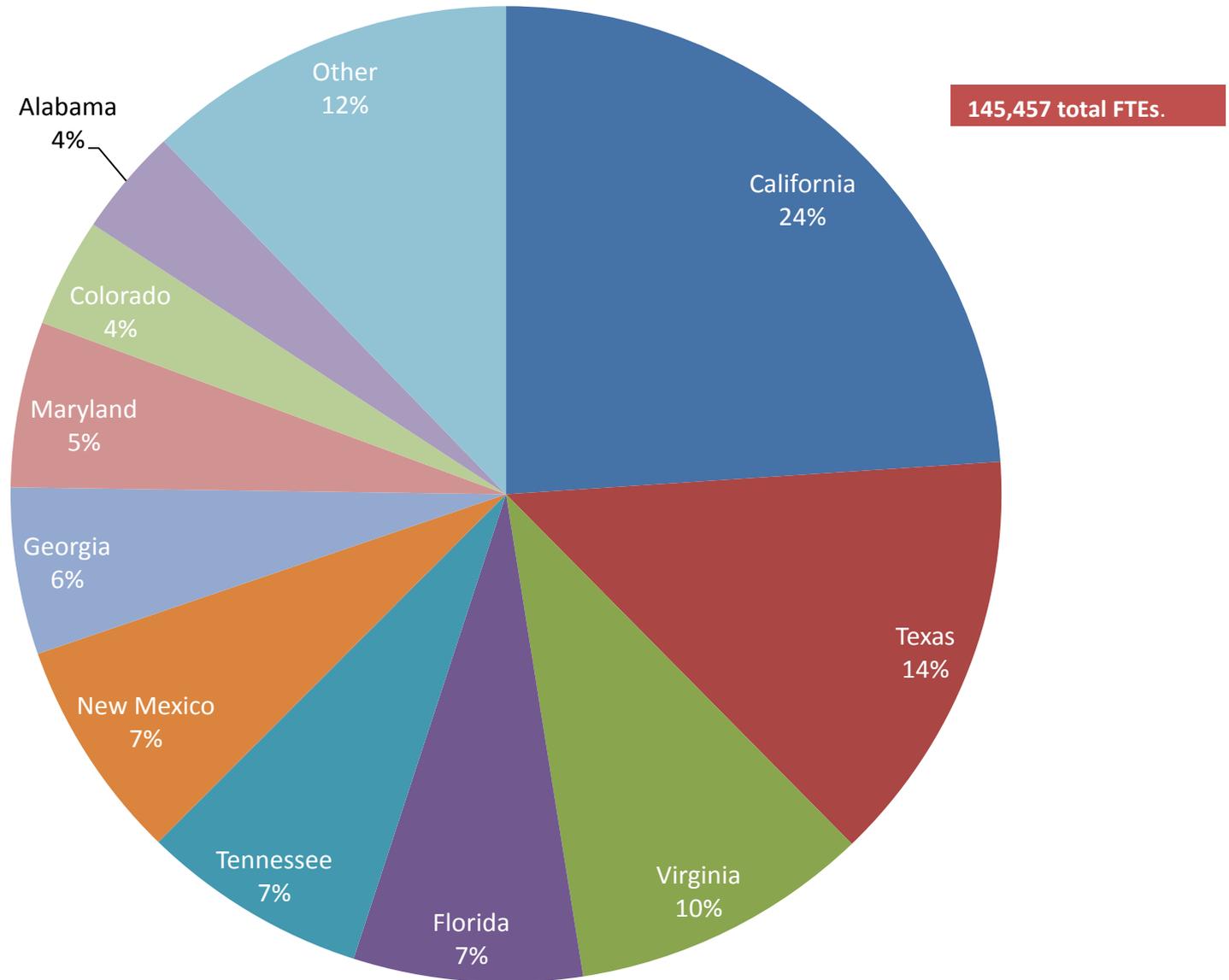
* Excluding USG organizations identified in the 350 respondents.

FTEs at Respondents with Potential for Loss of Viability/Solvency by Type*



* Excluding USG organizations identified in the 350 respondents.

FTEs with Potential for Loss of Viability/Solvency by State (2012)*



* Excluding USG organizations identified in the 350 respondents.