

facts & figures: main outcomes from the 2018 survey

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FINAL DATA REFERENCE YEAR 2017

ANNEX TO THE PRESS RELEASE

ASD-EUROSPACE
The Space group in ASD

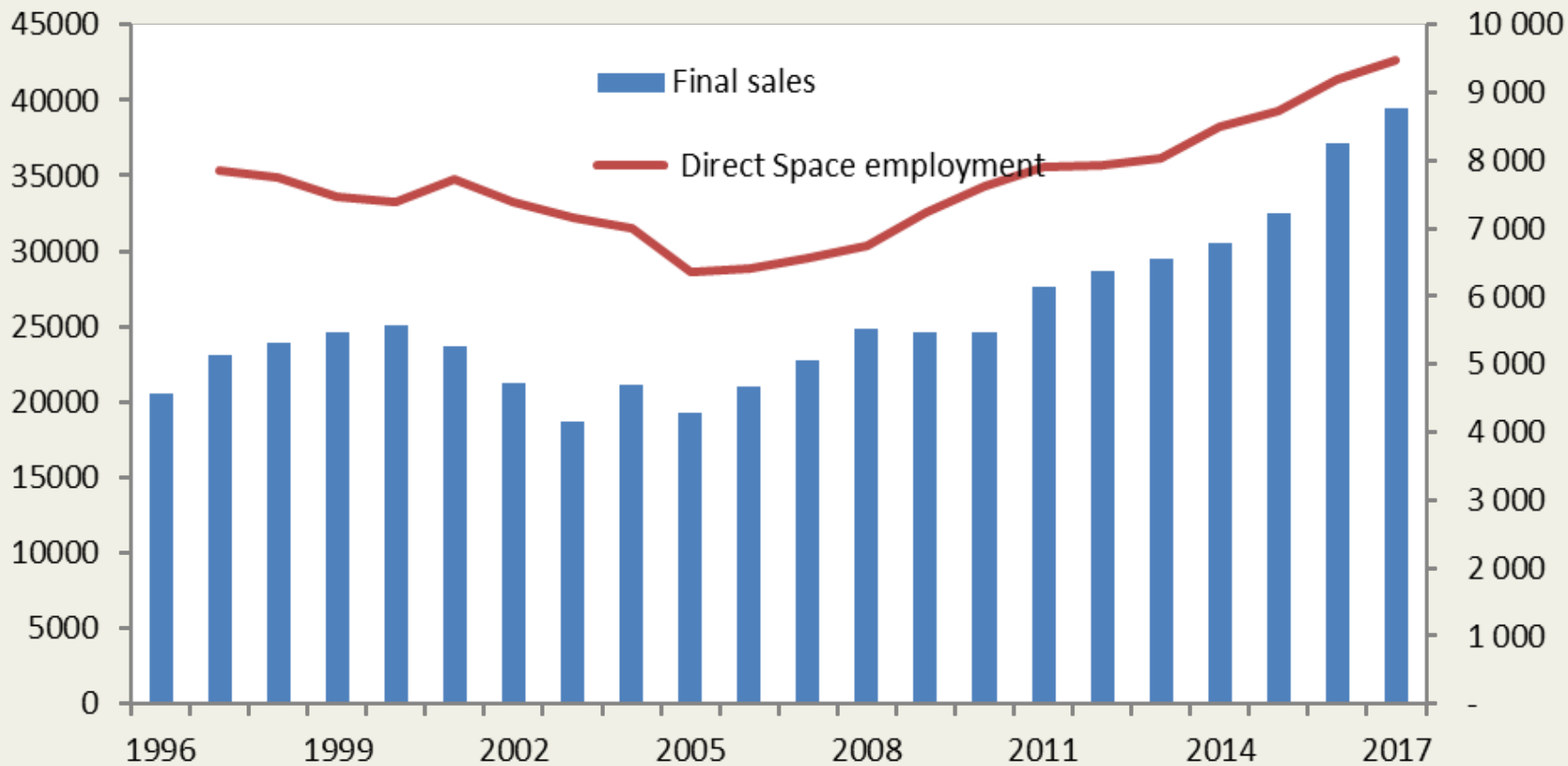
Key facts in 2017

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- **Final sales worth 8.76 B€ (+6.2%)**
 - Direct industry employment 42 664 FTE (+3.2%)
 - Women represent about 21% of space industry employees.
- **European space sector is facing an unprecedented long series of growing sales.**
 - Growth of sales to European customers was very important in 2017 (+703 M€) compensating largely the decrease in exports (-188 M€).
 - ✦ Growth on European market segments was supported mainly by increased commercial sales, including European private operators (+339M€) and operational launcher systems (+107 M€).
 - ✦ Military customers also represented a segment in growth (+197 M€)
 - ✦ Sales to ESA remained globally stable, with a notable reduction of launcher development sales, compensated by growth in satellite applications (mostly Earth Observation).
 - On export markets, the main segment in decrease was the segment of private satellite operators (-241 M€).
- **As with previous years, the improvement of sales has supported growing employment in the sector, although not proportionally.**
 - In the past decade, the average value of final sales per worker has improved by 37%.

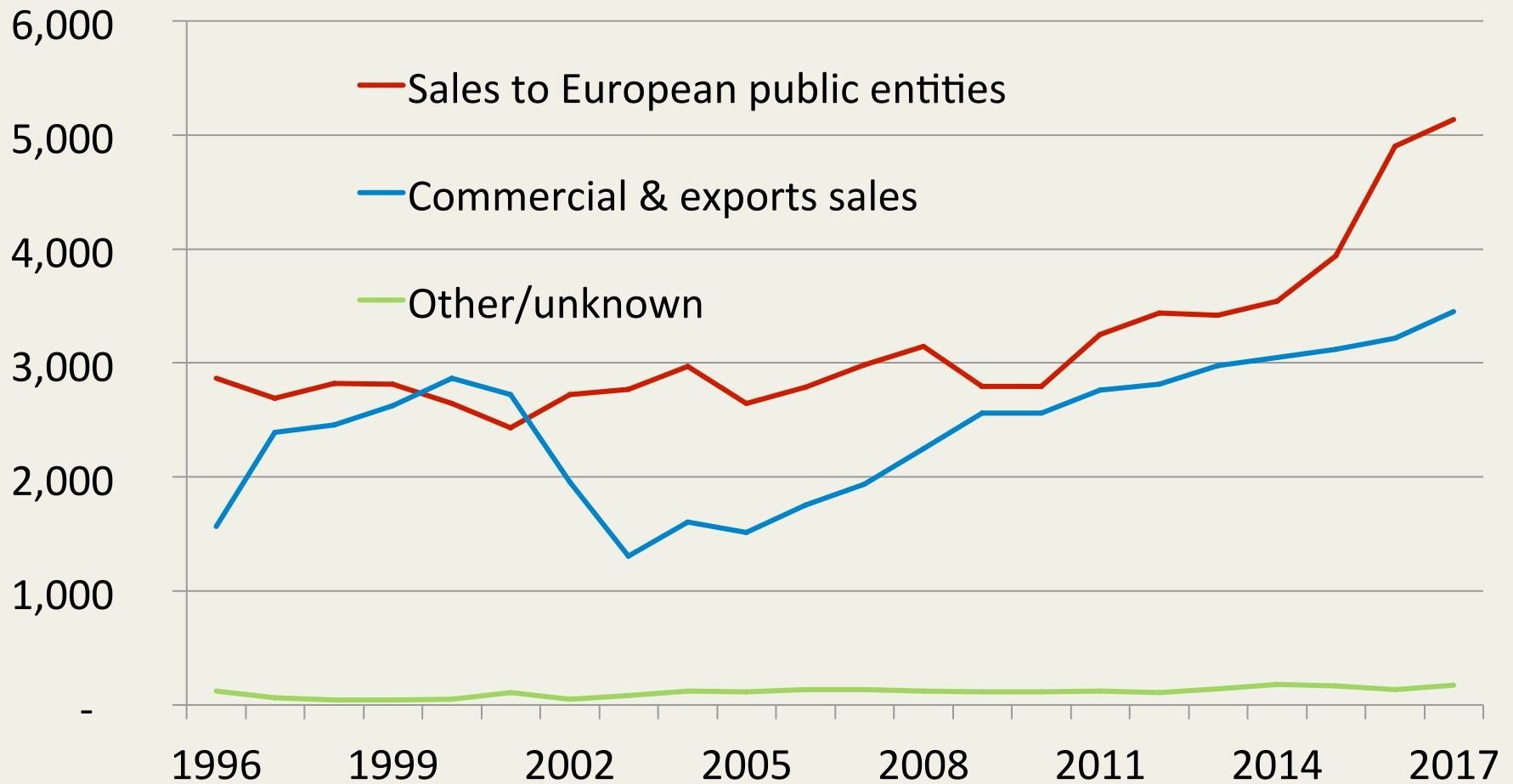
European Space industry sales (current M€ -RIGHT) & employment (FTE - LEFT)

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European Space industry sales by main customer segment (current M€)

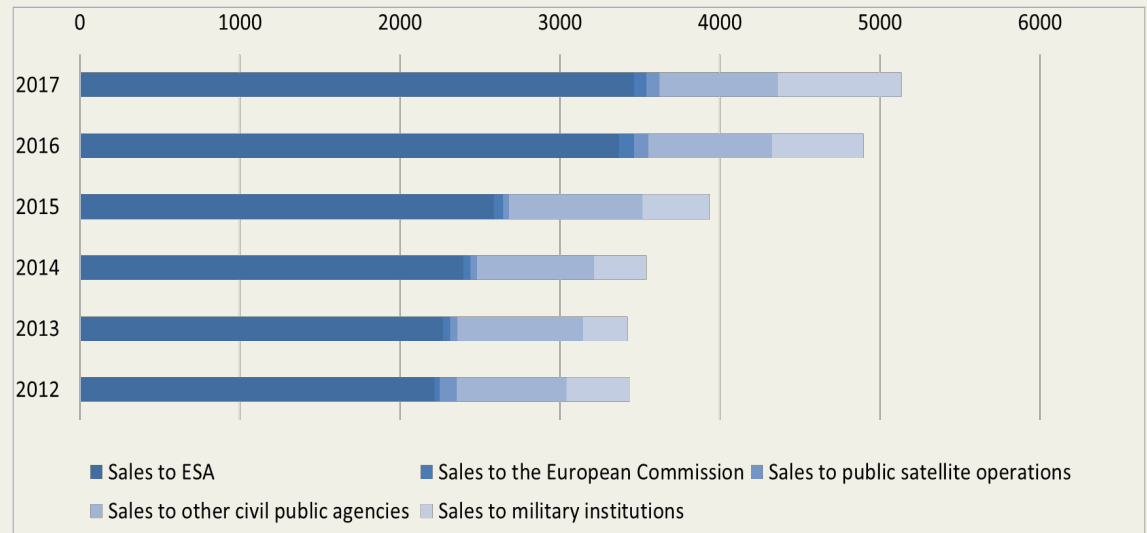
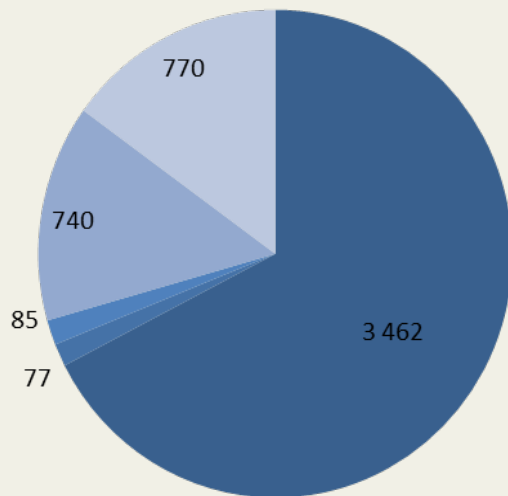
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European institutional customers

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- Institutional programmes promoted by European governments represent more than half of European industry's business (**59% in 2017, 5.1 B€**).



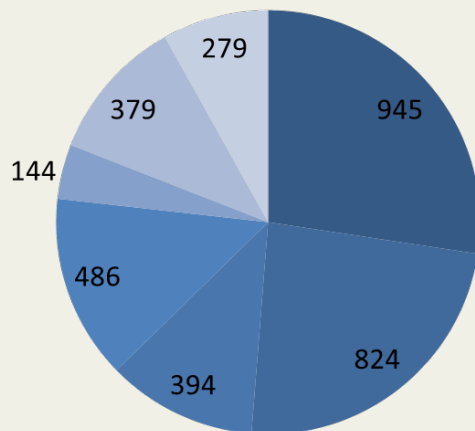
- Sales to European institutional customers by procuring entity (M€) 2017
 - Note : among the total Sales to ESA in 2017, the European Commission and Eumetsat programmes delegated to ESA represent respectively an estimated 500M€ and 150M€ worth of revenues for the sector.

Commercial customers & exports

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- Commercial markets represent 41% of industry sales in 2017 (3.5 B€).

EUROPEAN SPACE INDUSTRY SALES - COMMERCIAL MARKET BY CUSTOMER SEGMENT - 2017 - M€



- Sales to Arianespace
- Sales to private satellite operators (EU)
- Sales to private satellite operators (RoW)
- Sales to other companies in the sector (RoW)
- Sales to public satellite operators (RoW)
- Sales to civil public agencies (RoW)
- Sales to military institutions (RoW)

EUROPEAN SPACE INDUSTRY SALES - COMMERCIAL MARKET BY CUSTOMER SEGMENT - 5-YEAR EVOLUTION

