

Key Takeaways from “Shaping the U.S. Space Launch Market”

The United States finds itself in the position of world leader in launch, with a relatively consolidated market. The United States conducts 50% more launches than it did at the peak of the space race—but more than five out of every six U.S. launches come from SpaceX.

While evaluating the American launch market’s ability to meet critical U.S. national security and foreign policy needs, this paper found the following challenges and opportunities exist in the market:

Opportunities:

- The United States leads the world in space launch by nearly every measure: number of launches, total mass to orbit, satellite count, and more.
- SpaceX’s emergence has provided regular, reliable, and relatively affordable launches to commercial and national security customers.
- Alongside SpaceX is a small group of technically viable alternatives. This variety offers the country a measure of resilience in the face of national security threats.

Challenges:

- Today’s market consolidation coupled with the capital requirements necessary to develop rockets make it difficult for new competitors to break in.
- China has shown the ability and willingness to invest the level of capital needed to create international competitors to the American leaders.

Recommendations:

1. The U.S. Department of Defense and NASA should:
 - a. Conduct **research and strategic investment toward in-space transportation technologies.**
 - b. **Execute small satellite missions** and **expand purchases of small launch vehicle services** to cheaply test technology and encourage a competitive future launch market.
 - c. **Expand launch infrastructure capacity, dispersion, and resilience** to improve U.S. launch capacity in peacetime and safeguard it in case of conflict.
2. The federal government should **promote competition** in the commercial space launch industry by continuing to allocate launches among multiple competitive vendors to ensure resilience and innovation.

For more information:

- Download the report: <https://cset.georgetown.edu/publication/shaping-the-u-s-space-launch-market/>
- Contact us: cset@georgetown.edu