

Federal Space Demand, FY2016 to FY2026: a demand side measurement of the U.S. space economy from the contract record

QuantixMind, Inc.

October 2026

Contents

1. Summary of findings
2. Why measure demand
3. Data and method
4. The eleven year series
5. Competition
6. Buyers
7. Sellers
8. Entrants
9. Geography
10. Themes
11. What the record cannot show
12. How this complements the supply side accounts
13. Reproduction
14. Appendix tables

1. Summary of findings

This report measures the United States space economy from the buyer's side. It reads every unclassified federal contract action that the Federal Procurement Data System (FPDS) published for a defined set of space related codes, from FY2016 through FY2026. It counts what agencies committed to buy, how they bought it and from whom. It does not estimate anything. Every figure in it is computed from 41,887 raw feed pages held on disk, and a separate program recomputes the headline figures from those pages with a different parser.

The study holds 413,031 unique contract actions after overlaps are removed. Two views run through the report. The full scope covers every action under five industry codes and two product codes. It totals \$433.54B in net obligations. The space only cut keeps actions coded as space vehicles (PSC 18) or space research and development (PSC AR). It totals \$125.90B across 147,543 actions. The full scope carries missile and communications spending that is not space, so every claim about space in this report rests on the space only cut unless it says otherwise.

The main findings follow.

- **Space demand is flat in nominal terms.** Space only obligations were \$11.94B in FY2016 and \$11.69B in FY2025, the last closed year. The peak was \$12.69B in FY2023. Because these are nominal dollars, a flat line is a real decline.
- **One buyer dominates.** NASA placed 88.9% of space only obligations. The buyer HHI for the space only cut is 8,009 on a scale to 10,000.
- **Seller concentration is high but lower than buyer concentration.** In the space only cut the top five vendor keys took 53.4% of dollars and the seller HHI is 702. In the full scope the top vendor alone took 30.8%.
- **Set asides collapsed in the space only cut.** The share of space only new awards reserved for small firms was 68.0% in FY2016 and 7.4% in FY2026. Yet small firms' share of space only dollars was 5.7% in FY2016 and 10.9% in FY2026.
- **Big awards hold most of the money.** In the full scope, 151 new awards above \$100 million held 54.1% of all new award dollars, while the median new award was \$21,344.
- **Competition is thinning.** In the space only cut the single offer share of competed new awards was 5.4% in FY2016 and 36.5% in FY2026.
- **Newer firms are winning more of what is competed.** In the space only cut, firms first seen within five years won 47.6% of competed new awards in FY2024 to FY2026. This is an upper bound.
- **Space work is cost type work.** 79.2% of space only dollars sit on cost type contracts, against 35.2% in the full scope.

- **Geography clusters.** 36.7% of space only dollars are performed in CA. The top ten states hold 82.8%.
- **Launch is the largest theme.** Of the six frontier themes, launch and in space transportation carries the most space only money, \$23.25B. In space manufacturing and servicing carries \$0.06B.

The record has limits. Classified awards and other transaction agreements (OTAs) are not in FPDS. FY2026 was pulled before the Department of Defense reporting lag had run out. Dollars are nominal. Vendor age is a proxy. Themes are found by keywords in free text. Section 11 sets these out in full.

2. Why measure demand

Most public pictures of the space economy come from the supply side. They add up what firms earn, what launches fly and what investors put in. Those are useful numbers. They also share a weakness. They describe sellers, and much of what they describe is reported by the sellers themselves.

The federal government is the largest single buyer of space goods and services in the United States. Its buying is recorded, action by action, in a public system. That record lets us ask questions that supply side accounts cannot answer well. How much did government commit to buy each year? Was the buying open to competition? How many firms answered? Which agencies did the buying? Which firms won, and were any of them new?

A demand side measure has three uses. First, it is a check. If supply side accounts show growth that the buyer's record does not, the gap needs an explanation. Second, it shows market structure: how concentrated buyers and sellers are, and how contracts are priced. Third, it can be repeated. The same rules applied to next year's records give next year's figures, with no survey and no model.

This report is narrow on purpose. It measures one buyer, the federal government, through one record, FPDS. It does not try to size the space economy. It tries to measure one side of it well.

3. Data and method

Source

The source is the FPDS public ATOM feed, a machine readable list of contract action records. The study sent one query per code family and fiscal year and pulled every page of each query. 41,887 pages were fetched between 2026-10-13T20:07:11Z and 2026-10-13T21:02:44Z. Every page is logged with its URL, time, byte count and SHA256 fingerprint. The log itself has the fingerprint
482c82273d505c39417c3d9fe9f1c9b3e75ab0c38e488f71b04ff41856b5c7ab.

The feed returned 418,428 records. Because one action can match both an industry code and a product code, the same action can appear in two queries. Removing those overlaps leaves 413,031 unique contract actions.

Scope

The full scope is every action, new or modified, signed from 1 October 2015 to 30 September 2026, whose principal industry code (NAICS) is 336414 (guided missile and space vehicle manufacturing), 336419 (other guided missile and space vehicle parts), 334220 (radio and wireless communications equipment), 517410 (satellite telecommunications) or 927110 (space research and technology), or whose product or service code (PSC) begins with 18 (space vehicles) or AR (space research and development).

The space only cut keeps actions whose PSC begins with 18 or AR, whatever their industry code. It is the series to use for claims about space. The full scope is wider and carries missile programs and general communications equipment.

Rules

The rules below were fixed before any figure was computed. They are the same rules printed in the study results file.

- **Fiscal year** is the federal year of the signed date, October to September.
- **Obligated dollars** are the sum of obligatedAmount over every action signed in the period, including modifications and deobligations. They are nominal.
- **New awards** are actions with modification number 0.
- **Competed** means extentCompeted code A, D, E, F or CDO. The competed share is over new awards that report the field. The single offer share is over competed new awards with an offer count of one or more.
- **Buyer** is the contracting sub tier agency. Buyer concentration uses agencies with positive net obligations. HHI is the sum of squared percentage shares.
- **Vendor** is the ultimate parent UEI, else the UEI, else the DUNS number, else the upper cased name.
- **Newer firm** is a vendor whose first in scope action in this dataset falls in the current fiscal year or the four before it. It is reported from FY2021 onward.

The extension in this report adds seven blocks, each defined before its numbers.

- **Sellers.** Top vendor share, top five share and seller HHI over vendors with positive net obligations, and a count of distinct vendors. Vendor keys with the same or similar names are not merged.

- **Set asides and small business.** The share of new awards, and of their dollars, carrying any set aside other than NONE, among new awards that report the field. The share of new awards, and of all dollars, where the contracting officer judged the vendor a small business.
- **Award size.** The median and 90th percentile obligation on new contracts and orders (IDVs excluded, since they rarely carry money at award), by the nearest rank rule, and the share of new award dollars in awards above \$100 million.
- **Place of performance.** Dollars by the principal place of performance state; places outside the United States and blanks are kept apart. State HHI is over US places with positive net obligations.
- **Agency series.** Dollars by fiscal year for the six largest contracting agencies in each view.
- **Pricing groups.** Fixed price, cost type, and other or not reported, from typeOfContractPricing.
- **Themes.** Six frontier market themes, each defined by a PSC list and a keyword list applied to the description field. Section 10 prints each rule.

Verification

Two checks stand between the raw pages and any figure here. The first is completeness: for every code and year, the entries on disk are compared with the total the feed reports. All slices matched. The second is recomputation. A separate program parses the raw pages with a standard XML parser rather than the pattern matching used by the study, verifies every page fingerprint, recomputes every headline in the results file, including each new block and each theme total, and prints pass or fail. It printed pass for this edition.

4. The eleven year series

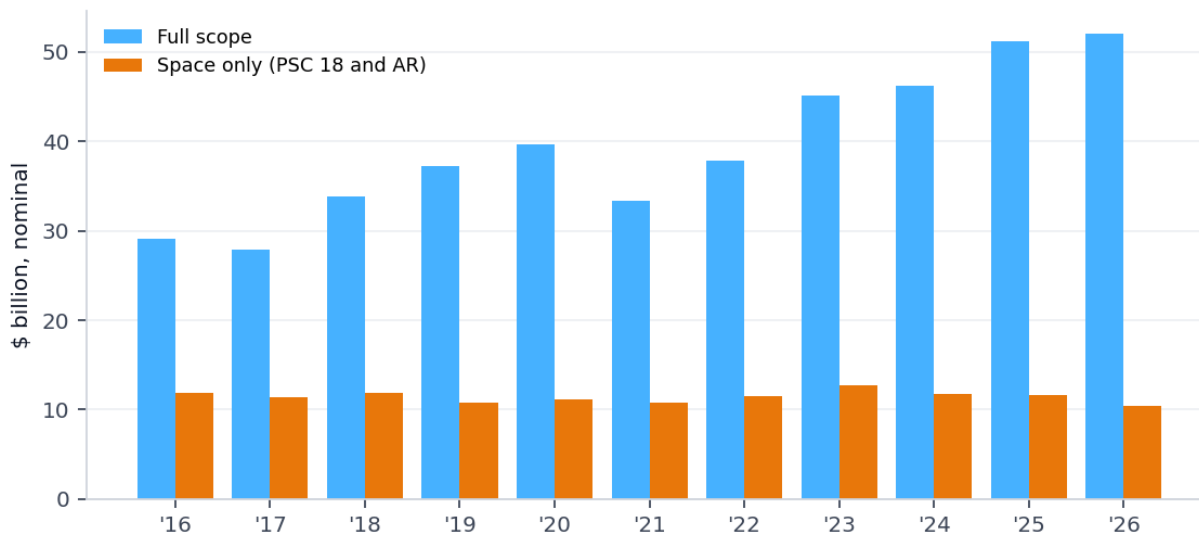


Figure 1. Net obligations by fiscal year, full scope and space only. Nominal dollars. FY2026 is incomplete.

Space only obligations sit in a narrow band. They were \$11.94B in FY2016, \$11.11B in FY2020 and \$11.69B in FY2025. The lowest year was FY2026 at \$10.37B; the highest was FY2023 at \$12.69B. FY2026, still incomplete when pulled, stands at \$10.37B.

The full scope moves differently. It rose from \$29.13B in FY2016 to \$51.26B in FY2025 and \$52.05B in FY2026 as pulled. Almost all of that growth is outside the space product codes. In FY2016 the product codes outside 18 and the A families, that is numeric product codes, took 44.9% of full scope dollars. In FY2026 they took 65.5%. That category is dominated by missiles and communications hardware.

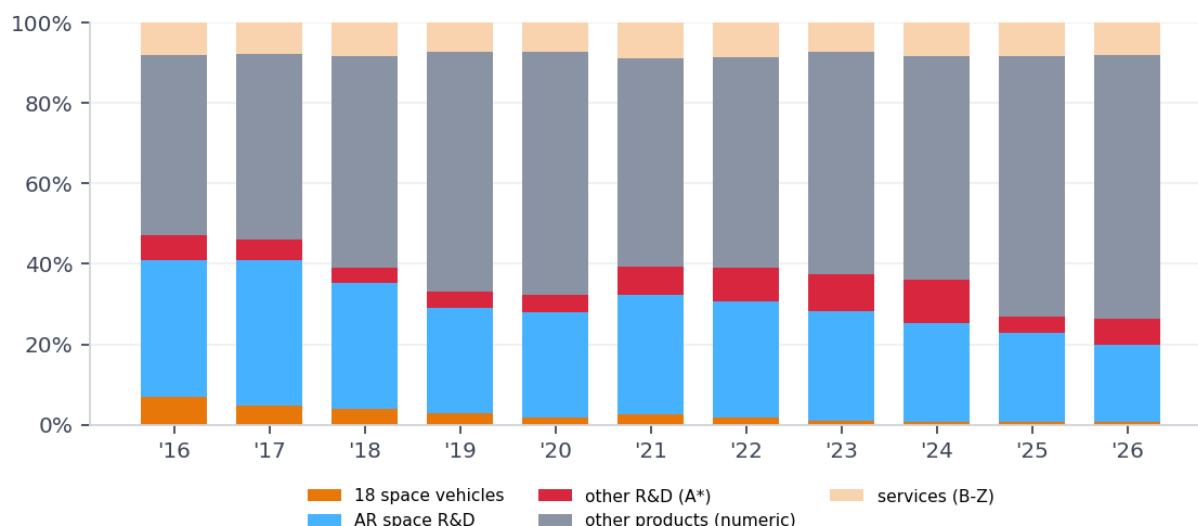


Figure 2. Share of full scope dollars by product and service code family.

Counts tell a second story. New space only awards numbered 2,706 in FY2016 and 3,116 in FY2020, then 778 in FY2021 and 297 in FY2025. Full scope new awards fell from 16,761 to 7,308 over the same span. The drop from FY2021 is sharp. It may reflect a change in buying, or a change in how agencies record orders. The record alone does not settle which, so shares that rest on award counts after FY2020 should be read with care.

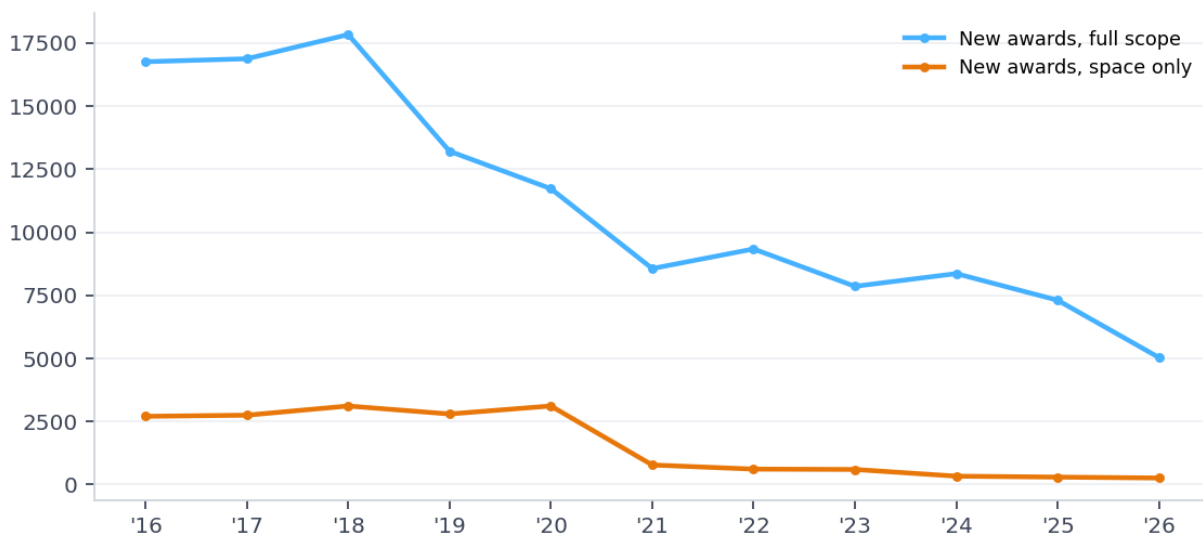


Figure 3. New awards by fiscal year, full scope and space only.

Within the space only cut, research and development dominates. The AR codes took 82.9% of space only dollars in FY2016 and 96.7% in FY2026. Space vehicles (PSC 18) fell from 17.1% to 3.3%. Federal space hardware is increasingly bought as research and development, or bought outside these product codes, or bought through instruments that FPDS does not record.

5. Competition

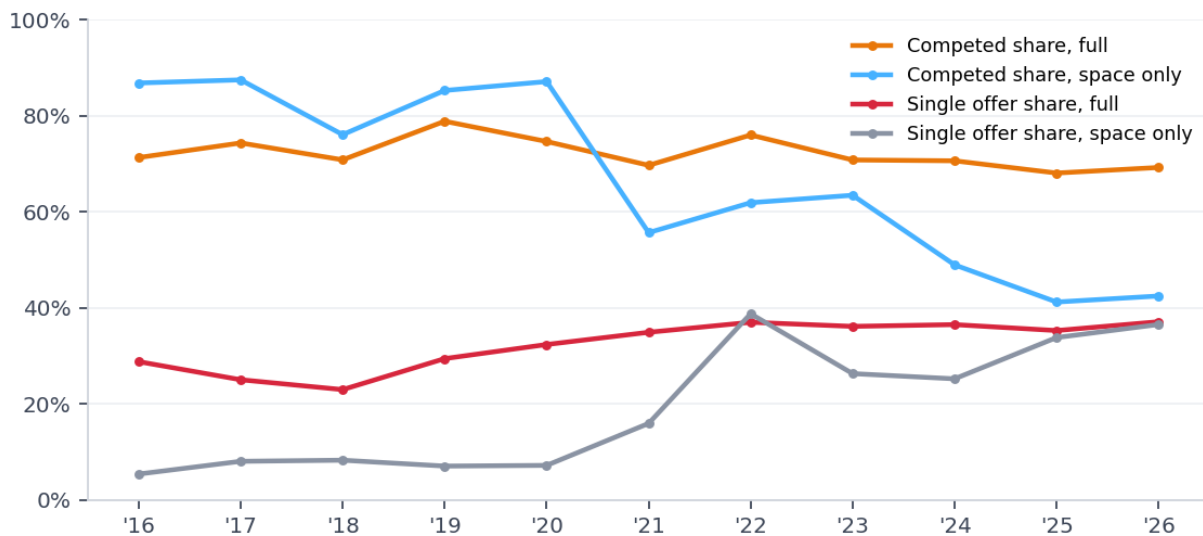


Figure 4. Competed share of new awards and single offer share of competed new awards.

Over all years, 72.7% of full scope new awards were competed, and 79.5% in the space only cut. Competition in name is common. Competition in practice is thinner. In the full scope, 30.3% of competed new awards with an offer count drew a single offer (n = 68,075).

The trend is the more telling figure. In the full scope the single offer share was 28.8% in FY2016 and 37.0% in FY2022, and stayed near that level, at 37.1% in FY2026. In the space only cut it was 5.4% in FY2016 and 36.5% in FY2026. The space only competed share fell from 86.8% in FY2016 to 42.5% in FY2026.

Both measures rely on fields that agencies fill in. Task orders inherit conventions that vary by agency, and offer counts are missing on some competed awards. Those awards are left out of the single offer denominator rather than guessed.

Pricing type is a second lens on competition and risk. In the space only cut, 79.2% of dollars sit on cost type contracts and 14.2% on fixed price. The full scope is the reverse: 62.8% fixed price and 35.2% cost type. Fixed price work in the space only cut rose from 9.2% of dollars in FY2016 to 20.3% in FY2024 and 18.6% in FY2026.

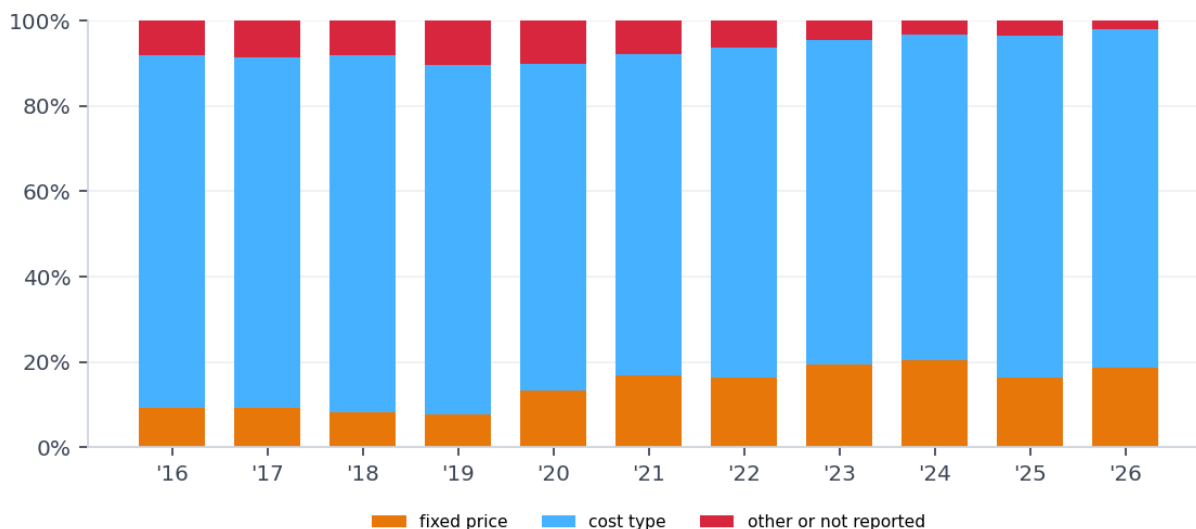


Figure 5. Space only dollars by pricing group.

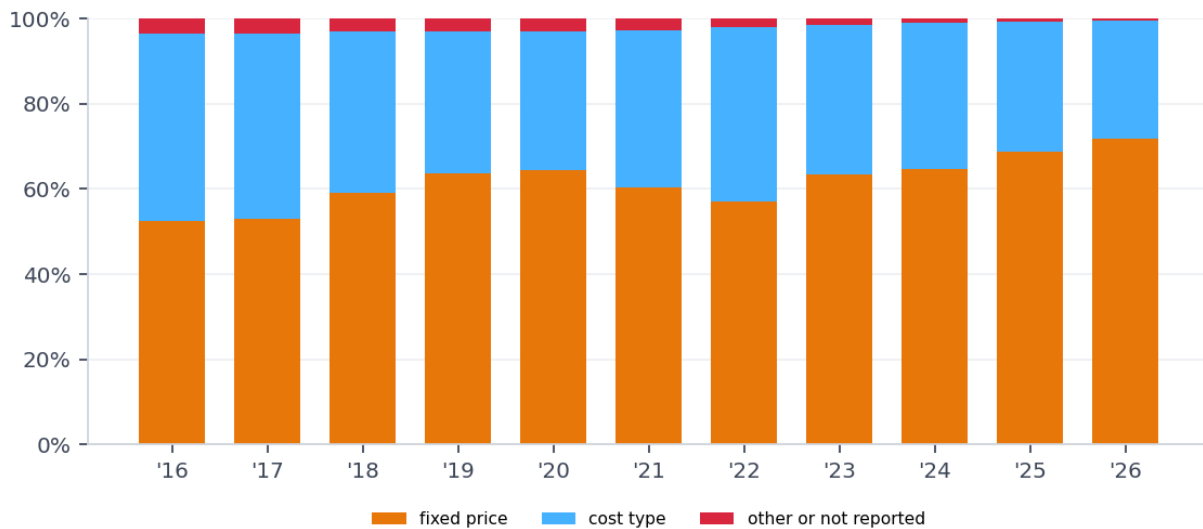


Figure 6. Full scope dollars by pricing group.

6. Buyers

NASA is the space market's buyer of record. It placed 88.9% of space only obligations among agencies with positive net obligations, and the top three agencies placed 99.7%. The space only buyer HHI is 8,009. By the usual antitrust reading, any figure above 2,500 is highly concentrated, and this is far above it. In the full scope NASA's share is 29.4% and the HHI is 2,165.

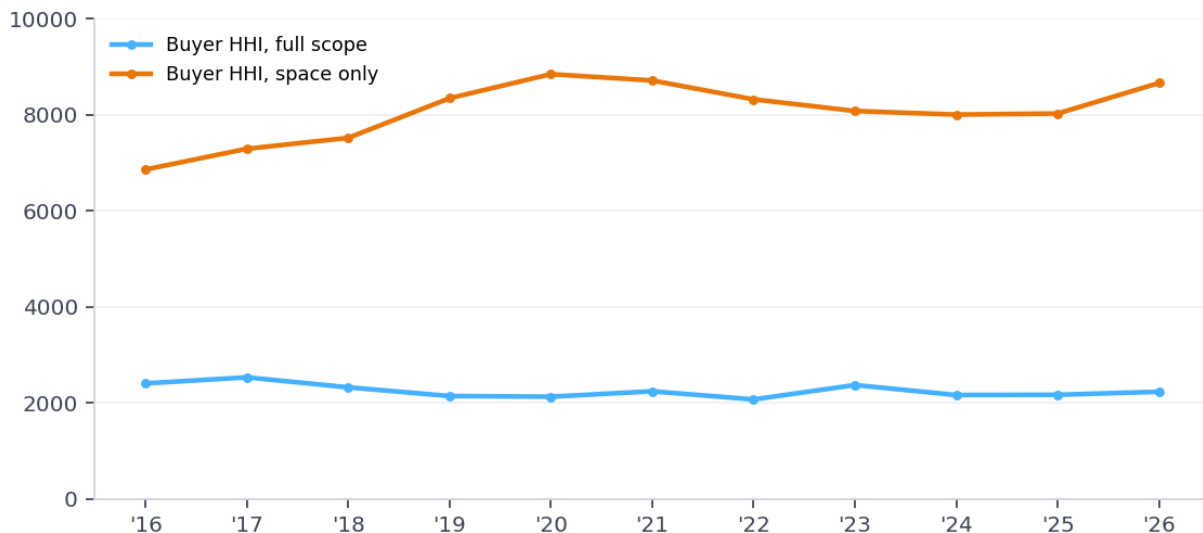


Figure 7. Buyer HHI by fiscal year, full scope and space only.

The six largest buyers in the full scope are, in order, NASA, Dept. of the Army, Dept. of the Air Force, Dept. of the Navy, Missile Defense Agency (MDA), Defense Information Systems

Agency (DISA). NASA obligated \$11.40B in full scope actions in FY2016 and \$12.07B in FY2025. The Army obligated \$5.16B in FY2016 and \$15.20B in FY2025, which is why it became the top full scope buyer in three recent years. That growth is missile and communications work, not space.

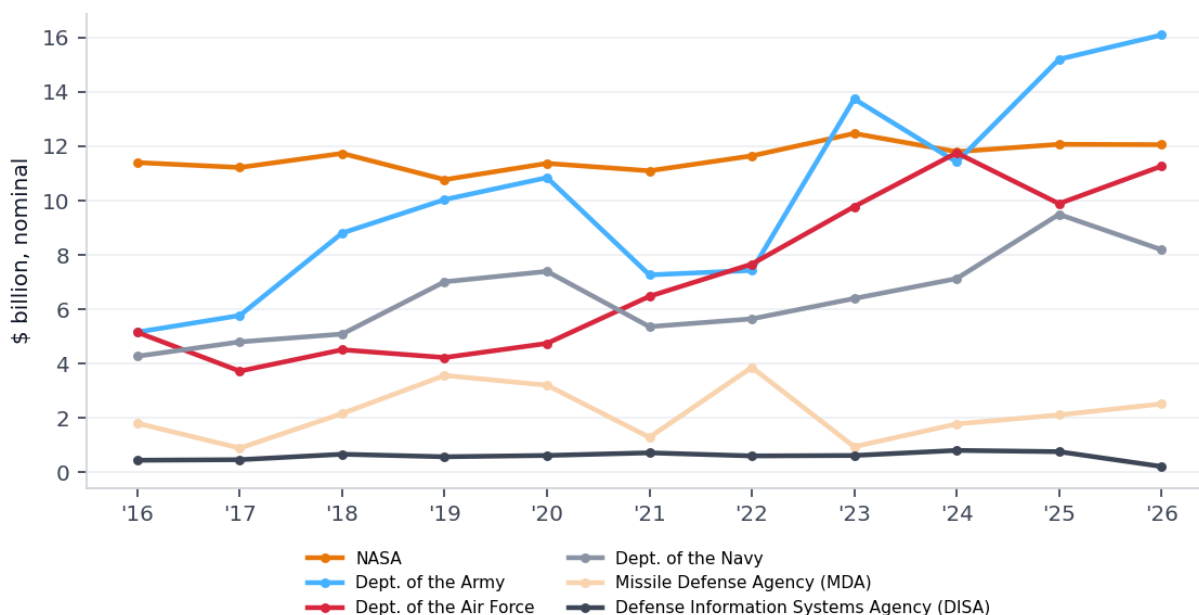


Figure 8. Full scope net obligations by contracting agency, six largest agencies.

In the space only cut the order is NASA, Dept. of the Air Force, Dept. of the Navy, Energy, Department of, Federal Acquisition Service, Defense Microelectronics Activity (DMEA). The Air Force, which contracts for the Space Force, obligated \$2.17B in space only actions in FY2016 and \$1.08B in FY2025. National security space is not small. It is mostly bought outside the space product codes, through classified awards, or through OTAs, none of which this cut can see.

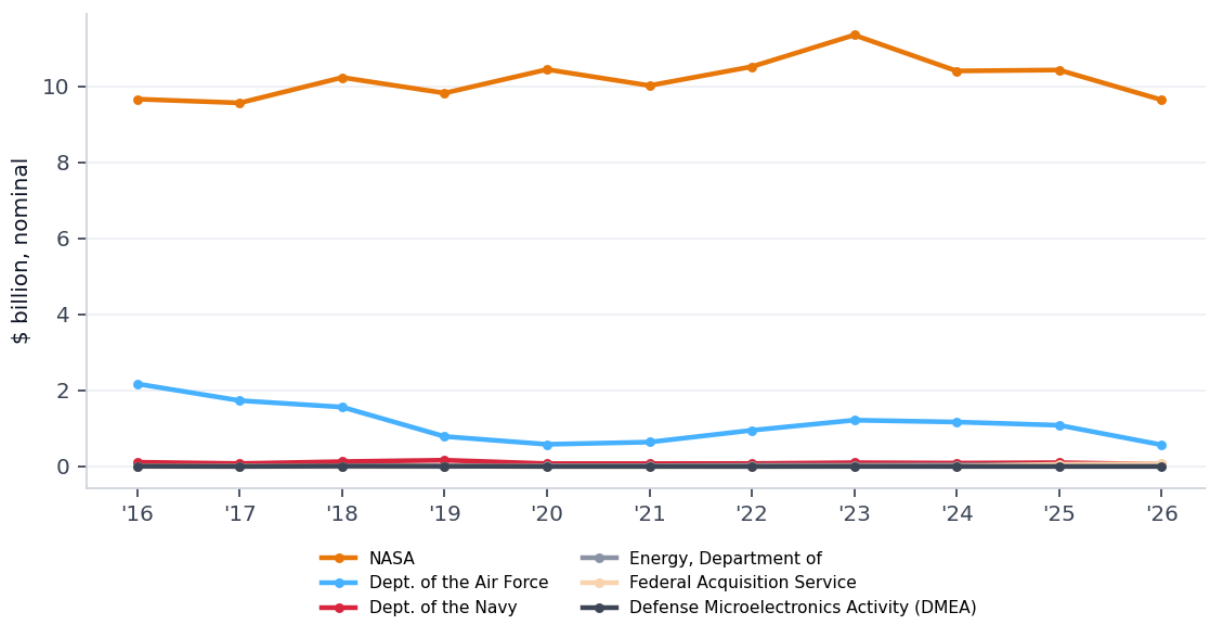


Figure 9. Space only net obligations by contracting agency, six largest agencies.

The buyer is the contracting office, not the funding agency. When one agency buys on behalf of another, the dollars sit with the office that signed.

7. Sellers

The full scope has 9,364 distinct vendor keys; the space only cut has 2,417. The space only count fell from 1,047 in FY2016 to 589 in FY2025.

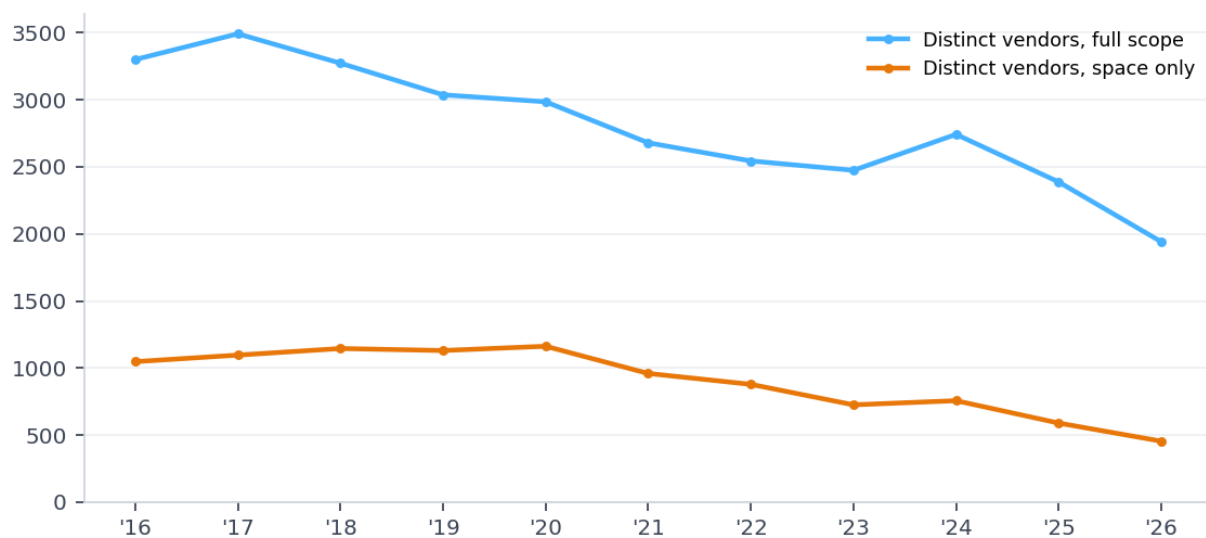


Figure 10. Distinct vendor keys by fiscal year.

Concentration among sellers is high in the full scope. The top vendor key, Lockheed Martin Corporation, took 30.8% of dollars. The top five took 57.8%. The seller HHI is 1,202.

In the space only cut the top vendor key is the operator of NASA's Jet Propulsion Laboratory, a federally funded research and development center, with 16.8%. The top five took 53.4% and the seller HHI is 702. Space only seller HHI was 1,125 in FY2016 and 528 in FY2024.

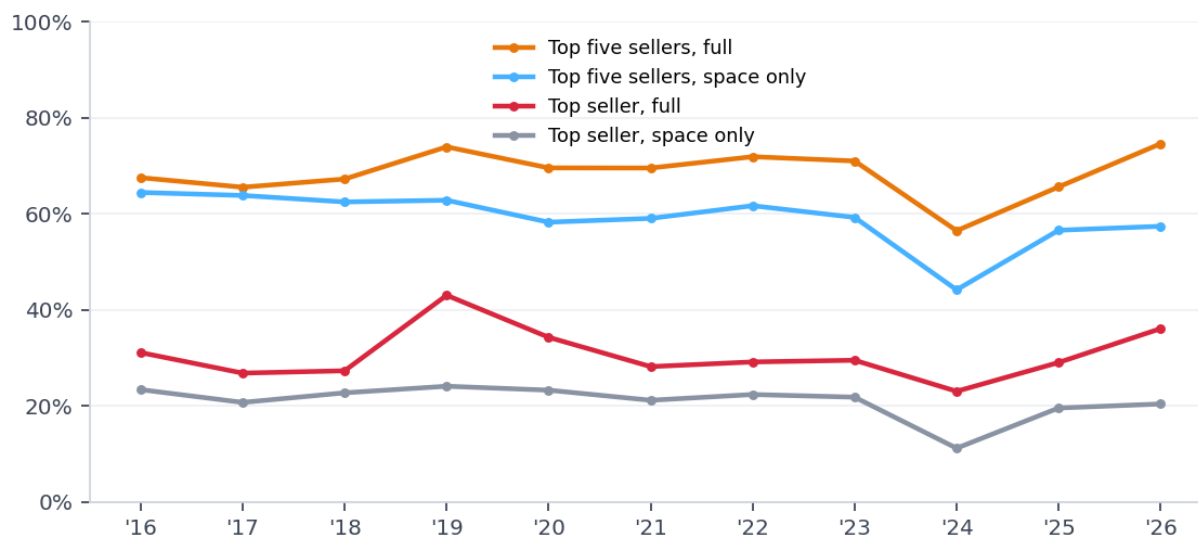


Figure 11. Top seller and top five seller shares of dollars.

Duplicate names are not merged. The same company can hold two vendor keys when its parent identifier changed or a subsidiary reports under another parent. In the full scope the top five keys include Raytheon Company twice. In the space only cut the research center operator appears twice. Merging would raise the measured concentration. These seller figures are therefore a floor on true concentration, not a ceiling.

Small business and set asides

Small business is common by count and rare by dollars. In the full scope, contracting officers judged the vendor small on 50.8% of new awards, but small firms took 5.0% of dollars. In the space only cut the figures are 26.3% and 7.3%.

Set asides tell a sharper story. In the space only cut, 68.0% of new awards reporting the field were set aside in FY2016 (n = 965), and 87.9% in FY2019. From FY2021 the share fell to 26.7%, and to 7.4% in FY2026 (n = 54). The number of new awards reporting the field fell with it. Much of the earlier volume was small research awards, and the fall coincides with the drop in recorded new awards after FY2020. Small firms' share of space only dollars did not fall: it was 5.7% in FY2016 and 10.9% in FY2026.

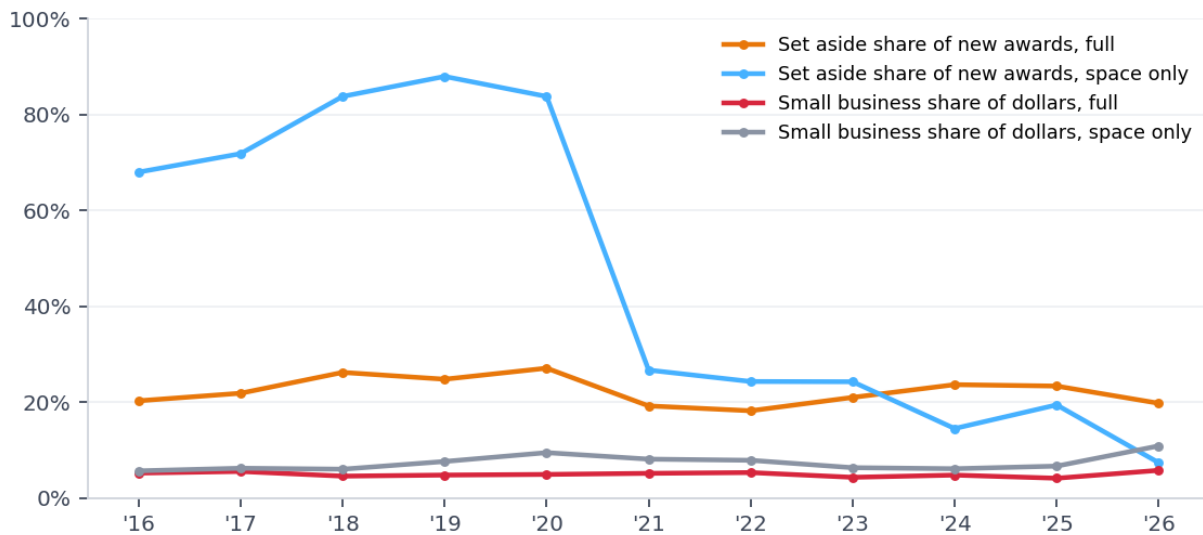


Figure 12. Set aside share of new awards and small business share of dollars.

Award size

The typical award is small and the typical dollar is in a big award. The median full scope new contract or order carried \$21,344 at award; the 90th percentile carried \$415,700 (n = 120,427). Yet 151 awards above \$100 million held 54.1% of new award dollars. In the space only cut the median was \$124,493 and the 90th percentile \$749,734; only 4 space only awards passed \$100 million at award, holding 12.4% of space only new award dollars.

The space only median rose from \$121,256 in FY2016 to \$403,250 in FY2026. Fewer, larger new awards is consistent with the fall in recorded award counts.

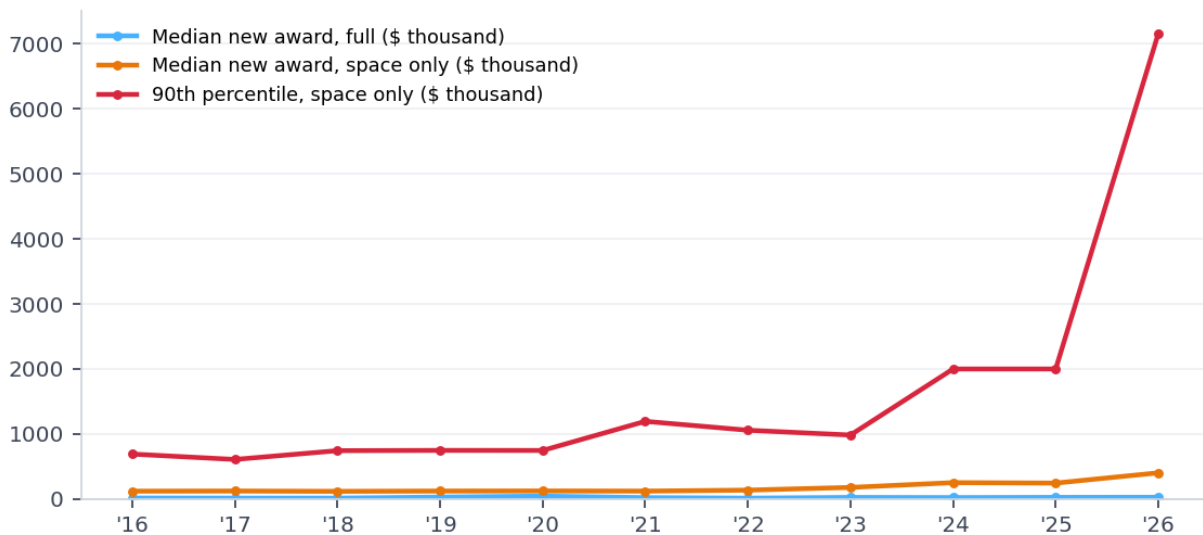


Figure 13. Median and 90th percentile obligation per new award.

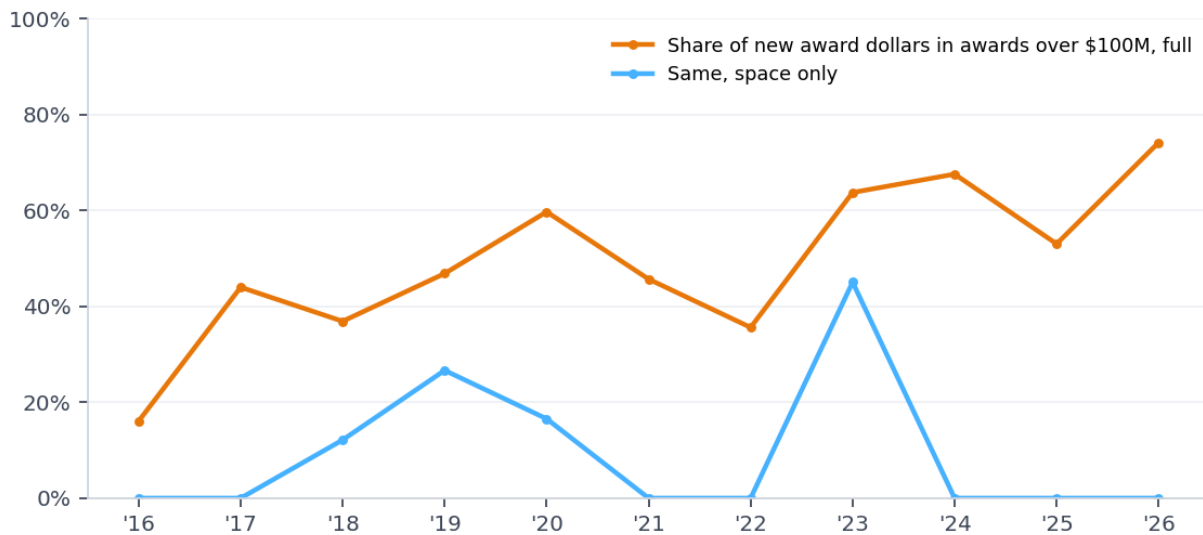


Figure 14. Share of new award dollars in awards above \$100 million.

Obligation at award is often a first increment. Large programs are funded through later modifications, so award size here understates the size of programs. It measures how money is first committed, not how big contracts become.

8. Entrants

A newer firm here is one whose first action in this dataset falls in the same fiscal year or the four before. Across FY2021 to FY2026, newer firms won 28.6% of full scope competed new awards and 24.7% of their dollars. In the space only cut the figures are 27.9% and 46.1%.

The share rose in the later years. In the full scope it was 21.5% in FY2021 and 39.1% in FY2024. In the space only cut it was 24.0% in FY2021 and 52.7% in FY2026. Pooled over FY2024 to FY2026, newer firms won 47.6% of space only competed new awards and 44.0% of their dollars.

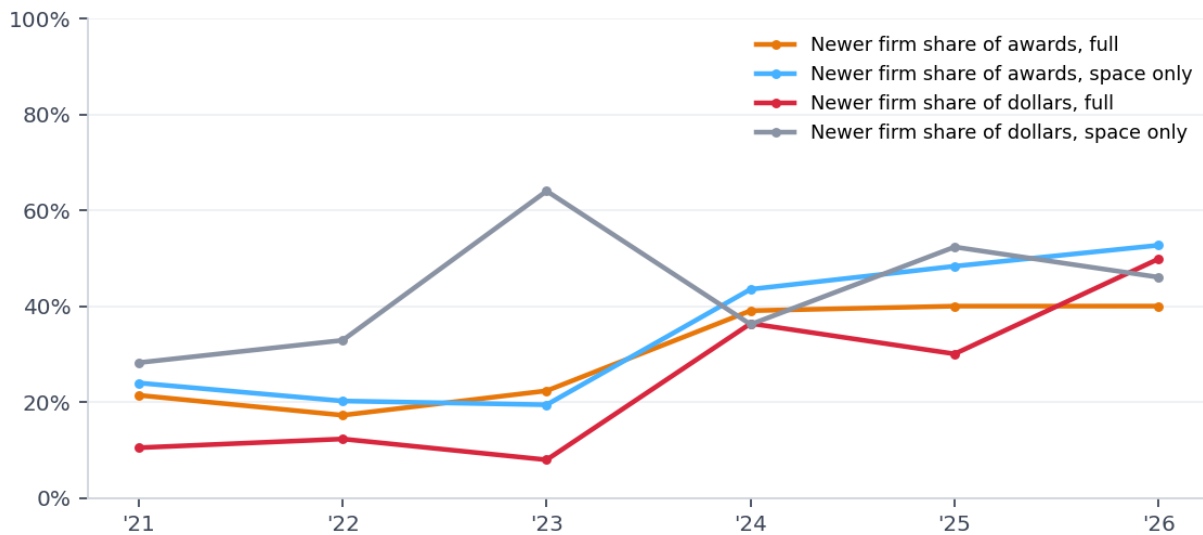


Figure 15. Newer firm share of competed new awards and of their dollars, FY2021 to FY2026.

This is an upper bound. The dataset starts in FY2016 and covers only these codes, so a firm with decades of federal work elsewhere can count as new here. Name only vendor keys can split one firm in two, which also raises the share. The later rise also rests on smaller award counts after FY2020. Read it as a sign that the space market is reaching firms it had not dealt with under these codes, not as a count of new companies.

9. Geography

Place of performance is where the work is mainly done. In the space only cut, CA hosts 36.7% of dollars, followed by CO at 10.6% and AL at 10.4%. The top ten states hold 82.8%. The state HHI is 2,082. Places outside the United States hold 0.2%, and 9.6% has no place recorded.

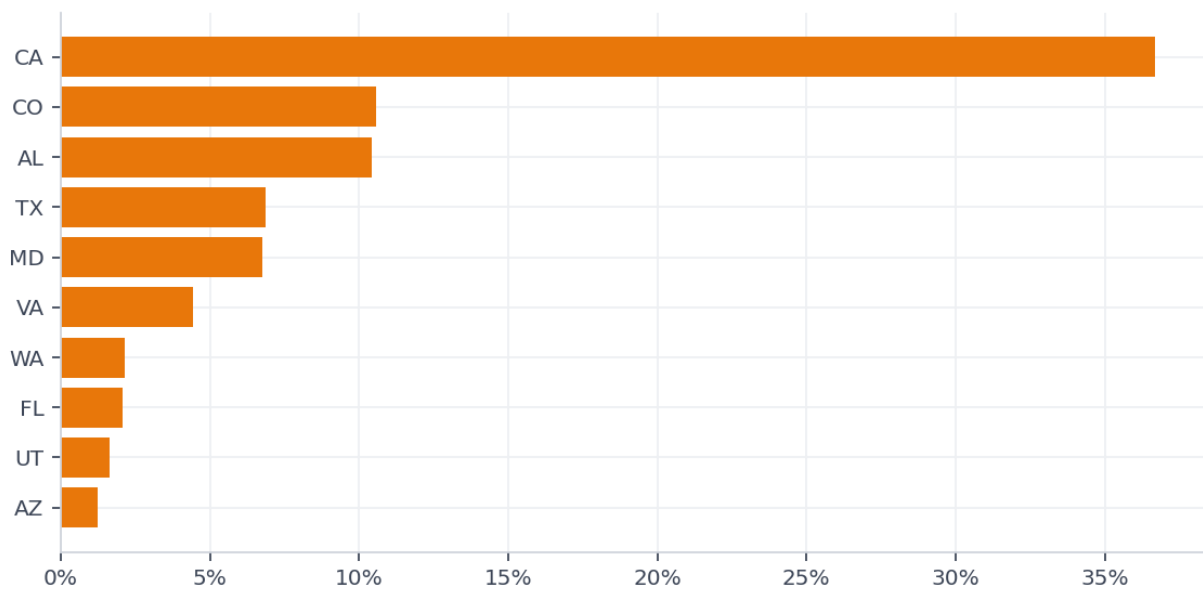


Figure 16. Space only dollars by place of performance, ten largest states.

The full scope map is different. TX leads with 20.0%, then CA with 15.4% and AZ with 15.3%. Missile production sites drive these shares. The full scope state HHI is 1,216.

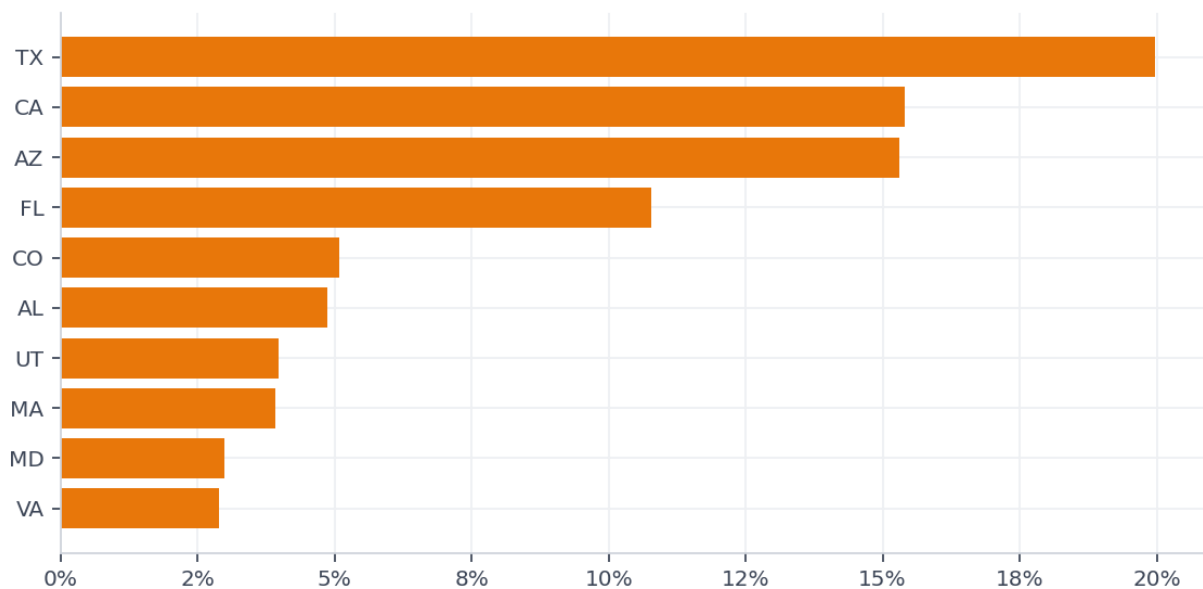


Figure 17. Full scope dollars by place of performance, ten largest states.

The space cluster has held its shape. CA was the top space only state in FY2016 with 40.8% and CA in FY2026 with 31.2%. A prime contractor with plants in several states is coded once, at its main site, so the true spread of work is wider than these shares.

10. Themes

The themes below follow the markets that frontier space investors and analysts track. Each theme is a rule printed before its numbers. An action is in a theme if its PSC is on the theme list or if its description field contains one of the theme phrases as whole words, after the field is upper cased and every character other than a letter or digit is turned into a space. Themes overlap: one action can sit in two.

The keyword method has limits that matter. The description is free text written by contracting staff. It is often short, sometimes a line item code, and sometimes a research abstract. A keyword finds actions that use the word, not actions that do the thing. It misses work described only by program names and catches research that mentions a term in passing. A modification whose own description lacks the keyword falls outside the theme even if its base award is inside. Theme dollars are therefore indicative. They are not market sizes.

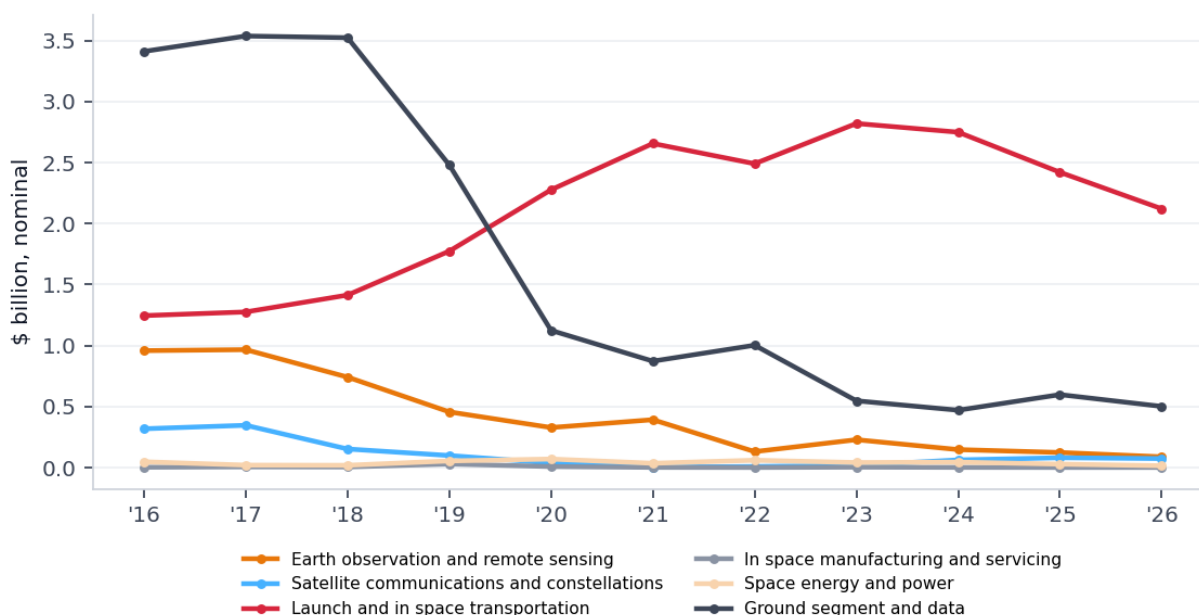


Figure 18. Space only net obligations by theme.

Earth observation and remote sensing

Rule. An action is in this theme if it carries no PSC code (none isolates this theme, so it rests on keywords alone), or if its description contains one of these phrases as whole words: EARTH OBSERVATION, EARTH OBSERVING, REMOTE SENSING, LANDSAT, IMAGERY, HYPERSPECTRAL, MULTISPECTRAL, SYNTHETIC APERTURE RADAR, JPSS, GOES R, GEOSTATIONARY OPERATIONAL ENVIRONMENTAL, WEATHER SATELLITE, SENTINEL 6.

In the full scope the theme holds \$6.30B over 11,415 actions and 1,400 new awards. In the space only cut it holds \$4.56B over 10,830 actions. Space only dollars in the theme were \$0.96B in FY2016 and \$0.09B in FY2026. In the full scope, 88.8% of new awards in the

theme were competed and 7.9% of competed awards with an offer count drew a single offer (n = 165). Newer firms won 19.5% of competed new awards in the theme from FY2021 to FY2026 in the full scope, and 12.9% in the space only cut. Of the full scope actions, 0 entered the theme through the PSC rule and the rest through keywords.

Satellite communications and constellations

Rule. An action is in this theme if it carries PSC DG11, 7G22, or if its description contains one of these phrases as whole words: SATCOM, SATELLITE COMMUNICATION, SATELLITE COMMUNICATIONS, SATELLITE TELECOMMUNICATIONS, SATELLITE SERVICES, CONSTELLATION, STARLINK, STARSHIELD, IRIDIUM, INMARSAT, TRANSPONDER, PROLIFERATED, MUOS, AEHF, WIDEBAND GLOBAL.

In the full scope the theme holds \$11.16B over 32,186 actions and 12,685 new awards. In the space only cut it holds \$1.20B over 1,323 actions. Space only dollars in the theme were \$0.32B in FY2016 and \$0.07B in FY2026. In the full scope, 82.1% of new awards in the theme were competed and 23.9% of competed awards with an offer count drew a single offer (n = 6,071). Newer firms won 39.9% of competed new awards in the theme from FY2021 to FY2026 in the full scope, and 38.5% in the space only cut. Of the full scope actions, 14,179 entered the theme through the PSC rule and the rest through keywords.

Launch and in space transportation

Rule. An action is in this theme if it carries PSC 1840, V126, or if its description contains one of these phrases as whole words: LAUNCH SERVICE, LAUNCH SERVICES, LAUNCH VEHICLE, LAUNCH VEHICLES, NSSL, EELV, CARGO RESUPPLY, COMMERCIAL RESUPPLY, CREW TRANSPORTATION, COMMERCIAL CREW, LUNAR LANDER, HUMAN LANDING SYSTEM, ORBITAL TRANSFER, SPACE TRANSPORTATION, SPACE LAUNCH SYSTEM.

In the full scope the theme holds \$35.50B over 5,531 actions and 308 new awards. In the space only cut it holds \$23.25B over 3,917 actions. Space only dollars in the theme were \$1.25B in FY2016 and \$2.12B in FY2026. In the full scope, 77.9% of new awards in the theme were competed and 2.5% of competed awards with an offer count drew a single offer (n = 161). Newer firms won 41.9% of competed new awards in the theme from FY2021 to FY2026 in the full scope, and 38.5% in the space only cut. Of the full scope actions, 1,031 entered the theme through the PSC rule and the rest through keywords.

In space manufacturing and servicing

Rule. An action is in this theme if it carries PSC 1850, or if its description contains one of these phrases as whole words: IN SPACE MANUFACTURING, IN SPACE ASSEMBLY, ON ORBIT SERVICING, ON ORBIT ASSEMBLY, SATELLITE SERVICING, OSAM, ROBOTIC REFUELING, MICROGRAVITY MANUFACTURING, RESTORE L,

ORBITAL DEBRIS REMOVAL.

In the full scope the theme holds \$0.23B over 364 actions and 67 new awards. In the space only cut it holds \$0.06B over 276 actions. Space only dollars in the theme were \$0.00B in FY2016 and \$0.00B in FY2026. In the full scope, 83.6% of new awards in the theme were competed and 4.9% of competed awards with an offer count drew a single offer (n = 41). Newer firms won 37.5% of competed new awards in the theme from FY2021 to FY2026 in the full scope, and 37.5% in the space only cut. Of the full scope actions, 1 entered the theme through the PSC rule and the rest through keywords.

Space energy and power

Rule. An action is in this theme if it carries no PSC code (none isolates this theme, so it rests on keywords alone), or if its description contains one of these phrases as whole words: SOLAR ARRAY, SOLAR ARRAYS, SPACE SOLAR, SPACE POWER, FISSION SURFACE POWER, RADIOISOTOPE, MMRTG, NUCLEAR THERMAL PROPULSION, POWER BEAMING, SOLAR ELECTRIC PROPULSION.

In the full scope the theme holds \$0.44B over 1,137 actions and 219 new awards. In the space only cut it holds \$0.44B over 1,130 actions. Space only dollars in the theme were \$0.05B in FY2016 and \$0.01B in FY2026. In the full scope, 88.1% of new awards in the theme were competed and 5.3% of competed awards with an offer count drew a single offer (n = 132). Newer firms won 33.3% of competed new awards in the theme from FY2021 to FY2026 in the full scope, and 36.4% in the space only cut. Of the full scope actions, 0 entered the theme through the PSC rule and the rest through keywords.

Ground segment and data

Rule. An action is in this theme if it carries PSC 1830, AR41, AR42, AR43, AR44, AR45, AR46, AR47, or if its description contains one of these phrases as whole words: GROUND STATION, GROUND STATIONS, GROUND SEGMENT, GROUND SYSTEM, GROUND SYSTEMS, TELEMETRY, TRACKING AND DATA, DEEP SPACE NETWORK, NEAR SPACE NETWORK, SATELLITE CONTROL NETWORK, SATELLITE OPERATIONS, MISSION OPERATIONS CENTER.

In the full scope the theme holds \$19.55B over 13,320 actions and 797 new awards. In the space only cut it holds \$18.07B over 12,121 actions. Space only dollars in the theme were \$3.41B in FY2016 and \$0.50B in FY2026. In the full scope, 27.4% of new awards in the theme were competed and 29.5% of competed awards with an offer count drew a single offer (n = 146). Newer firms won 35.7% of competed new awards in the theme from FY2021 to FY2026 in the full scope, and 0.0% in the space only cut. Of the full scope actions, 1,324 entered the theme through the PSC rule and the rest through keywords.

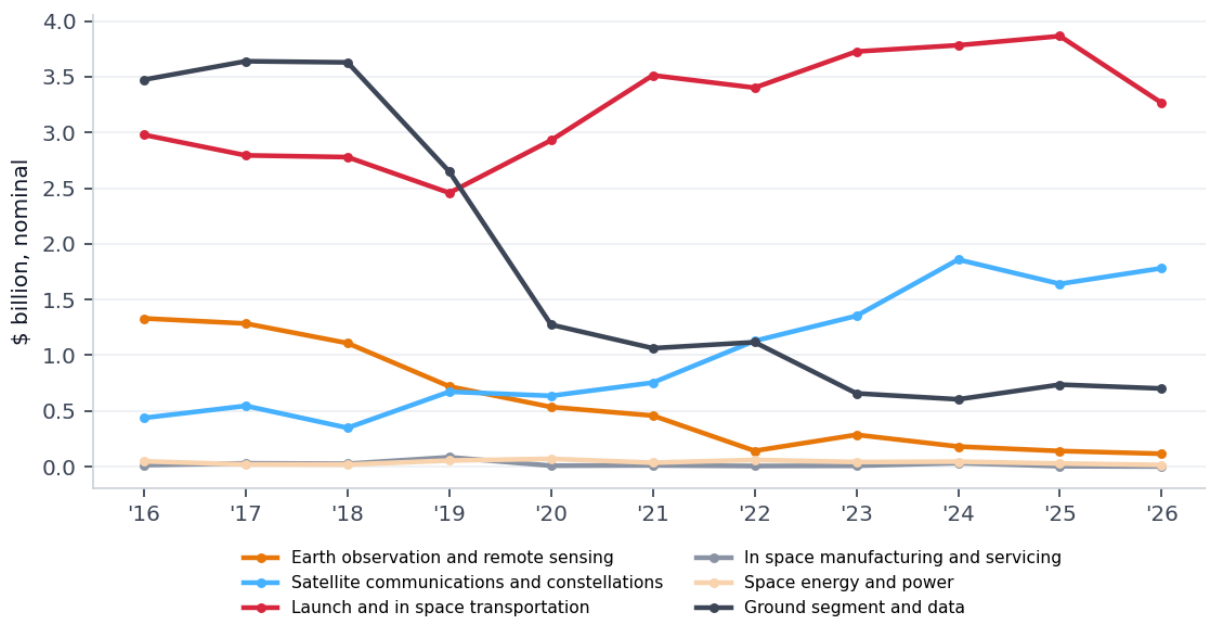


Figure 19. Full scope net obligations by theme.

Two patterns stand out. First, the themes most discussed as growth markets are small in the federal record. In space manufacturing and servicing and space energy and power together hold \$0.06B and \$0.44B of space only money over eleven years. Second, ground segment work is bought with little competition: in the space only cut, 21.5% of its new awards were competed, against 79.5% for space only work overall.

11. What the record cannot show

The FPDS record is broad, but it is not the whole of federal space buying. These limits apply to every figure here.

- **Classified awards are absent.** Much national security space spending is classified and never reaches FPDS.
- **Other transaction agreements are absent.** OTAs are increasingly used for space prototypes and launch, and are not reported to FPDS.
- **Grants and cooperative agreements are absent.** They are a different record.
- **FY2026 is incomplete.** It was pulled before the Department of Defense reporting lag of up to 90 days had passed.
- **Dollars are nominal.** No inflation adjustment is applied, because no price index file was fetched for this study.
- **Agency coded fields vary.** Competition, offer counts, set asides, business size, pricing and place of performance are all entered by contracting staff.

- **Vendor identity is imperfect.** Parent identifiers are as recorded today; acquisitions can merge firms, and missing identifiers fall back to names.
- **The full scope is not a space series.** Its industry codes include missiles and communications equipment.
- **Themes are keyword based.** They show where words appear, not what was delivered.
- **Obligations are not outlays.** An obligation is a commitment to pay; payment can come years later.

The record also cannot show demand that was never placed: work an agency wanted but did not fund, or bought from its own staff. It measures transactions, not needs.

12. How this complements the supply side accounts

Two families of official work describe the space economy from the supply side. The Bureau of Economic Analysis publishes a space economy satellite account for the United States. It builds the space economy out of the national accounts: it identifies space related goods and services across industries, and reports their gross output, value added, employment and compensation, with the government's own space activity as one component. The Organisation for Economic Co-operation and Development publishes a handbook on measuring the space economy. It frames the space economy as a value chain, from upstream manufacturing and launch through downstream services that depend on space infrastructure, and sets out how countries can compile comparable statistics from national accounts, surveys and administrative data.

No figure from either source is used here. Neither file was fetched for this study, and the report does not quote their estimates.

This study is built the other way. It starts from one large buyer and counts what that buyer committed to buy, transaction by transaction. That gives four things the supply side accounts do not. It gives market structure: buyer and seller concentration, competition and pricing type. It gives timeliness: the record is public within days to months, not years. It gives auditability: every figure traces to raw records anyone can fetch. And it gives a bridge: federal purchases are a component of government spending in the national accounts, so a contract based series can, with care, be set beside the government component of a satellite account.

It also lacks things the supply side accounts have. It sees only federal buying, only unclassified contracts and only the codes chosen. It says nothing about commercial customers, exports or household use of space services. The two views are complements. Where they agree, confidence rises. Where they differ, the difference is itself a finding worth explaining.

13. Reproduction

The study can be rebuilt from public data with four commands, run in order.

1. Fetch every page of the FPDS feed for each code family and fiscal year: `python3 -I bidtools/space_demand_fetch.py`
2. Compute every metric into results.json and RESULTS.md: `python3 -I bidtools/space_demand.py`
3. Recompute the headline figures with a second parser and check every page fingerprint: `python3 -I data/space-demand/check.py`
4. Draw the charts and render this report: `python3 bidtools/space_report.py`

The fetch log lists every page URL with its fingerprint, so a reader can confirm that a fresh pull returns the same pages for closed years. The results file, results.json, carries every figure in this report. Charts are drawn from that file and from nothing else.

Suggested citation: QuantixMind, Inc. (2026). Federal Space Demand, FY2016 to FY2026: a demand side measurement of the U.S. space economy from the contract record.

14. Appendix tables

A1. Full scope by fiscal year

FY	actions	new awards	obligated	competed	single offer	buyer HHI
2016	41,960	16,761	\$29.13B	71.3%	28.8%	2,407
2017	49,550	16,877	\$27.87B	74.3%	25.0%	2,533
2018	47,711	17,836	\$33.86B	70.8%	23.0%	2,325
2019	40,573	13,212	\$37.21B	78.8%	29.4%	2,144
2020	41,163	11,728	\$39.67B	74.6%	32.4%	2,130
2021	37,858	8,562	\$33.31B	69.7%	34.9%	2,243
2022	41,317	9,339	\$37.85B	76.0%	37.0%	2,073
2023	33,673	7,859	\$45.08B	70.8%	36.1%	2,373
2024	29,957	8,362	\$46.25B	70.6%	36.5%	2,165
2025	28,911	7,308	\$51.26B	68.1%	35.3%	2,170
2026	20,358	5,037	\$52.05B	69.2%	37.1%	2,233

A2. Space only by fiscal year

FY	actions	new awards	obligated	competed	single offer	buyer HHI
2016	15,925	2,706	\$11.94B	86.8%	5.4%	6,858
2017	16,468	2,751	\$11.38B	87.5%	8.1%	7,290
2018	18,425	3,115	\$11.92B	76.1%	8.3%	7,517
2019	17,437	2,799	\$10.78B	85.2%	7.1%	8,342
2020	17,414	3,116	\$11.11B	87.1%	7.2%	8,843
2021	15,371	778	\$10.74B	55.7%	16.0%	8,711
2022	13,948	614	\$11.57B	61.9%	38.8%	8,319

FY	actions	new awards	obligated	competed	single offer	buyer HHI
2023	10,531	600	\$12.69B	63.4%	26.3%	8,077
2024	8,427	334	\$11.70B	48.9%	25.2%	8,002
2025	8,185	297	\$11.69B	41.2%	33.8%	8,023
2026	5,412	262	\$10.37B	42.5%	36.5%	8,659

A3. Newer firm shares

FY	full awards	full dollars	space awards	space dollars
2021	21.5%	10.5%	24.0%	28.3%
2022	17.3%	12.3%	20.3%	32.9%
2023	22.4%	8.0%	19.5%	64.0%
2024	39.1%	36.4%	43.6%	36.2%
2025	40.0%	30.1%	48.4%	52.4%
2026	40.0%	49.9%	52.7%	46.1%

A4. Sellers, full scope

FY	vendors	top seller	top five	seller HHI
2016	3,300	31.1%	67.5%	1,435
2017	3,492	26.8%	65.5%	1,254
2018	3,273	27.3%	67.2%	1,358
2019	3,037	43.0%	73.9%	2,132
2020	2,985	34.3%	69.6%	1,558
2021	2,679	28.2%	69.5%	1,340
2022	2,544	29.2%	71.9%	1,477
2023	2,474	29.5%	71.0%	1,468
2024	2,742	23.1%	56.5%	985
2025	2,387	29.0%	65.6%	1,461
2026	1,941	36.1%	74.6%	1,873

A5. Set asides and small business, full scope

FY	set aside awards	set aside \$	small business awards	small business \$
2016	20.3%	8.8%	47.2%	5.2%
2017	21.9%	6.0%	48.2%	5.6%
2018	26.2%	8.3%	45.5%	4.6%
2019	24.8%	5.0%	50.4%	4.8%
2020	27.1%	3.6%	49.9%	5.0%
2021	19.2%	5.8%	58.4%	5.2%
2022	18.2%	7.8%	52.8%	5.3%
2023	21.0%	2.9%	53.9%	4.3%

FY	set aside awards	set aside \$	small business awards	small business \$
2024	23.7%	3.5%	52.1%	4.8%
2025	23.4%	7.9%	57.9%	4.2%
2026	19.8%	0.7%	58.8%	5.8%

A6. Award size, full scope

FY	new awards	median	90th pct	over \$100M	\$ over \$100M
2016	16,575	\$16,240	\$253,776	5	16.1%
2017	16,657	\$14,940	\$250,000	11	44.0%
2018	17,673	\$14,851	\$250,123	11	36.9%
2019	13,043	\$30,398	\$479,816	15	46.8%
2020	11,419	\$45,445	\$609,450	13	59.7%
2021	8,210	\$22,279	\$510,446	12	45.7%
2022	9,103	\$14,310	\$381,867	11	35.6%
2023	7,638	\$25,502	\$612,045	17	63.7%
2024	8,204	\$23,294	\$744,898	22	67.6%
2025	7,145	\$26,381	\$705,781	15	53.0%
2026	4,760	\$27,808	\$816,140	19	74.1%

A7. Place of performance, full scope

FY	top state	share	top ten	state HHI	not reported
2016	CA	25.1%	84.5%	1,384	6.7%
2017	CA	25.6%	84.2%	1,359	6.0%
2018	CA	20.8%	86.6%	1,321	3.8%
2019	TX	27.5%	87.6%	1,483	2.7%
2020	TX	25.2%	84.5%	1,278	3.3%
2021	AZ	15.6%	84.7%	1,082	3.4%
2022	TX	19.0%	87.7%	1,239	4.1%
2023	TX	21.2%	84.8%	1,222	4.3%
2024	AZ	16.8%	83.6%	1,142	4.9%
2025	AZ	20.1%	85.8%	1,337	4.2%
2026	TX	27.5%	90.3%	1,522	4.2%

state	share of dollars, all years
TX	20.0%
CA	15.4%
AZ	15.3%
FL	10.8%
CO	5.1%
AL	4.9%

state	share of dollars, all years
UT	4.0%
MA	3.9%
MD	3.0%
VA	2.9%

A8. Pricing groups, full scope

FY	fixed price	cost type	other
2016	52.5%	44.0%	3.5%
2017	53.1%	43.3%	3.6%
2018	59.1%	37.9%	3.0%
2019	63.8%	33.1%	3.1%
2020	64.4%	32.6%	2.9%
2021	60.4%	37.0%	2.7%
2022	57.1%	40.9%	2.0%
2023	63.4%	35.2%	1.4%
2024	64.8%	34.3%	0.9%
2025	68.7%	30.4%	0.8%
2026	71.8%	27.7%	0.5%

A9. Agency dollars, full scope

FY	NASA	Dept. of the Army	Dept. of the Air Force
2016	\$11.40B	\$5.16B	\$5.15B
2017	\$11.22B	\$5.77B	\$3.73B
2018	\$11.74B	\$8.81B	\$4.51B
2019	\$10.77B	\$10.04B	\$4.23B
2020	\$11.37B	\$10.85B	\$4.75B
2021	\$11.10B	\$7.27B	\$6.48B
2022	\$11.65B	\$7.43B	\$7.67B
2023	\$12.47B	\$13.74B	\$9.78B
2024	\$11.80B	\$11.42B	\$11.76B
2025	\$12.07B	\$15.20B	\$9.89B
2026	\$12.06B	\$16.09B	\$11.27B

FY	Dept. of the Navy	Missile Defense Agency (MDA)	Defense Information Systems Agency (DISA)	All other
2016	\$4.28B	\$1.81B	\$0.45B	\$0.88B
2017	\$4.80B	\$0.90B	\$0.47B	\$0.98B
2018	\$5.09B	\$2.17B	\$0.67B	\$0.87B
2019	\$7.02B	\$3.57B	\$0.58B	\$1.01B

FY	Dept. of the Navy	Missile Defense Agency (MDA)	Defense Information Systems Agency (DISA)	All other
2020	\$7.40B	\$3.21B	\$0.63B	\$1.48B
2021	\$5.36B	\$1.29B	\$0.72B	\$1.08B
2022	\$5.65B	\$3.87B	\$0.61B	\$0.98B
2023	\$6.40B	\$0.95B	\$0.62B	\$1.12B
2024	\$7.13B	\$1.78B	\$0.81B	\$1.54B
2025	\$9.49B	\$2.12B	\$0.77B	\$1.72B
2026	\$8.20B	\$2.52B	\$0.22B	\$1.69B

A10. Themes, full scope

Earth observation and remote sensing

FY	obligated	actions	new awards	completed	single offer	newer firm
2016	\$1.33B	1,720	324	92.0%	4.3%	n/a
2017	\$1.29B	1,899	366	92.1%	2.8%	n/a
2018	\$1.11B	2,108	336	87.2%	2.3%	n/a
2019	\$0.72B	1,671	200	84.5%	0.0%	n/a
2020	\$0.54B	1,439	111	94.6%	9.1%	n/a
2021	\$0.46B	1,091	13	84.6%	66.7%	27.3%
2022	\$0.14B	514	12	75.0%	33.3%	11.1%
2023	\$0.29B	364	15	80.0%	33.3%	16.7%
2024	\$0.18B	235	5	40.0%	100.0%	0.0%
2025	\$0.14B	228	10	30.0%	100.0%	0.0%
2026	\$0.12B	146	8	50.0%	66.7%	50.0%

Satellite communications and constellations

FY	obligated	actions	new awards	completed	single offer	newer firm
2016	\$0.44B	1,602	796	94.2%	4.6%	n/a
2017	\$0.55B	6,649	1,363	96.6%	3.2%	n/a
2018	\$0.35B	3,478	1,410	93.0%	10.8%	n/a
2019	\$0.67B	1,809	1,003	92.6%	27.8%	n/a
2020	\$0.64B	848	271	71.0%	25.6%	n/a
2021	\$0.75B	1,375	568	57.1%	52.5%	19.4%
2022	\$1.13B	3,549	1,798	88.2%	45.8%	9.0%
2023	\$1.35B	3,360	1,207	80.3%	54.0%	17.4%
2024	\$1.86B	3,955	2,064	78.8%	60.3%	55.5%
2025	\$1.64B	3,136	1,267	67.9%	53.5%	74.9%
2026	\$1.78B	2,425	938	58.8%	65.4%	79.4%

Launch and in space transportation

FY	obligated	actions	new awards	competed	single offer	newer firm
2016	\$2.98B	565	70	81.4%	2.3%	n/a
2017	\$2.79B	573	60	85.0%	0.0%	n/a
2018	\$2.78B	568	47	91.5%	4.3%	n/a
2019	\$2.46B	515	35	80.0%	0.0%	n/a
2020	\$2.93B	538	28	64.3%	0.0%	n/a
2021	\$3.51B	543	17	70.6%	10.0%	33.3%
2022	\$3.40B	514	4	0.0%	n/a	n/a
2023	\$3.73B	429	12	58.3%	16.7%	0.0%
2024	\$3.78B	391	7	57.1%	0.0%	25.0%
2025	\$3.87B	460	17	82.4%	0.0%	64.3%
2026	\$3.27B	435	11	54.5%	0.0%	66.7%

In space manufacturing and servicing

FY	obligated	actions	new awards	competed	single offer	newer firm
2016	\$0.01B	15	9	77.8%	0.0%	n/a
2017	\$0.03B	36	11	100.0%	0.0%	n/a
2018	\$0.03B	51	14	100.0%	8.3%	n/a
2019	\$0.08B	57	10	80.0%	0.0%	n/a
2020	\$0.01B	43	11	72.7%	14.3%	n/a
2021	\$0.01B	46	6	66.7%	0.0%	75.0%
2022	\$0.01B	35	4	75.0%	n/a	0.0%
2023	\$0.01B	28	1	100.0%	n/a	0.0%
2024	\$0.03B	24	1	0.0%	n/a	n/a
2025	\$0.00B	19	0	n/a	n/a	n/a
2026	\$0.00B	10	0	n/a	n/a	n/a

Space energy and power

FY	obligated	actions	new awards	competed	single offer	newer firm
2016	\$0.05B	136	53	98.1%	2.7%	n/a
2017	\$0.02B	133	45	97.8%	6.1%	n/a
2018	\$0.02B	167	45	88.9%	4.0%	n/a
2019	\$0.05B	147	26	80.8%	15.4%	n/a
2020	\$0.07B	140	27	88.9%	0.0%	n/a
2021	\$0.04B	117	7	57.1%	0.0%	25.0%
2022	\$0.06B	98	4	75.0%	0.0%	33.3%
2023	\$0.04B	57	3	33.3%	n/a	0.0%
2024	\$0.04B	70	6	66.7%	25.0%	50.0%
2025	\$0.03B	42	1	0.0%	n/a	n/a
2026	\$0.01B	30	2	0.0%	n/a	n/a

Ground segment and data

FY	obligated	actions	new awards	competed	single offer	newer firm
2016	\$3.47B	2,448	135	38.5%	27.0%	n/a
2017	\$3.64B	2,446	124	33.1%	34.6%	n/a
2018	\$3.63B	2,723	240	17.1%	29.2%	n/a
2019	\$2.65B	2,160	88	34.1%	38.5%	n/a
2020	\$1.27B	953	52	23.1%	25.0%	n/a
2021	\$1.06B	766	38	26.3%	40.0%	50.0%
2022	\$1.12B	584	29	21.4%	16.7%	16.7%
2023	\$0.66B	355	22	22.7%	60.0%	0.0%
2024	\$0.60B	286	26	19.2%	0.0%	80.0%
2025	\$0.74B	384	36	38.9%	14.3%	35.7%
2026	\$0.70B	215	7	28.6%	50.0%	0.0%

A4. Sellers, space only

FY	vendors	top seller	top five	seller HHI
2016	1,047	23.4%	64.4%	1,125
2017	1,096	20.7%	63.8%	1,062
2018	1,145	22.7%	62.5%	1,010
2019	1,130	24.1%	62.8%	1,108
2020	1,162	23.3%	58.2%	944
2021	959	21.2%	59.0%	929
2022	878	22.4%	61.7%	980
2023	725	21.8%	59.2%	936
2024	756	11.2%	44.2%	528
2025	589	19.6%	56.6%	858
2026	454	20.4%	57.4%	895

A5. Set asides and small business, space only

FY	set aside awards	set aside \$	small business awards	small business \$
2016	68.0%	46.4%	26.4%	5.7%
2017	71.8%	70.3%	27.3%	6.2%
2018	83.8%	73.4%	25.8%	6.0%
2019	87.9%	38.9%	28.2%	7.7%
2020	83.8%	29.6%	27.6%	9.5%
2021	26.7%	10.9%	21.6%	8.1%
2022	24.3%	35.5%	18.6%	7.9%
2023	24.3%	2.7%	19.0%	6.4%
2024	14.5%	12.7%	27.2%	6.1%
2025	19.4%	49.3%	28.6%	6.7%
2026	7.4%	9.1%	26.3%	10.9%

A6. Award size, space only

FY	new awards	median	90th pct	over \$100M	\$ over \$100M
2016	2,684	\$121,256	\$691,705	0	0.0%
2017	2,727	\$123,446	\$609,032	0	0.0%
2018	3,101	\$118,641	\$744,134	1	12.1%
2019	2,778	\$123,152	\$748,306	1	26.6%
2020	3,096	\$124,590	\$747,419	1	16.5%
2021	739	\$122,356	\$1,195,000	0	0.0%
2022	595	\$137,331	\$1,058,452	0	0.0%
2023	588	\$178,721	\$984,299	1	45.0%
2024	311	\$252,254	\$2,000,000	0	0.0%
2025	286	\$245,525	\$2,000,000	0	0.0%
2026	254	\$403,250	\$7,156,098	0	0.0%

A7. Place of performance, space only

FY	top state	share	top ten	state HHI	not reported
2016	CA	40.8%	89.0%	2,422	4.7%
2017	CA	43.8%	88.6%	2,579	4.8%
2018	CA	40.8%	88.8%	2,241	4.1%
2019	CA	33.6%	83.8%	1,739	6.1%
2020	CA	32.8%	83.5%	1,713	6.5%
2021	CA	33.8%	84.2%	1,816	7.5%
2022	CA	38.2%	84.5%	2,227	9.8%
2023	CA	39.4%	81.3%	2,421	13.0%
2024	CA	34.5%	78.8%	2,168	16.8%
2025	CA	33.1%	80.5%	2,055	16.0%
2026	CA	31.2%	80.7%	2,039	15.8%

state	share of dollars, all years
CA	36.7%
CO	10.6%
AL	10.4%
TX	6.9%
MD	6.7%
VA	4.4%
WA	2.1%
FL	2.1%
UT	1.6%
AZ	1.2%

A8. Pricing groups, space only

FY	fixed price	cost type	other
2016	9.2%	82.8%	8.0%
2017	9.2%	82.3%	8.5%
2018	8.3%	83.5%	8.2%
2019	7.7%	81.9%	10.4%
2020	13.3%	76.6%	10.1%
2021	17.0%	75.1%	7.9%
2022	16.4%	77.4%	6.2%
2023	19.4%	76.1%	4.5%
2024	20.3%	76.3%	3.4%
2025	16.5%	80.1%	3.4%
2026	18.6%	79.4%	2.0%

A9. Agency dollars, space only

FY	NASA	Dept. of the Air Force	Dept. of the Navy
2016	\$9.66B	\$2.17B	\$0.11B
2017	\$9.56B	\$1.73B	\$0.08B
2018	\$10.23B	\$1.56B	\$0.13B
2019	\$9.82B	\$0.79B	\$0.16B
2020	\$10.44B	\$0.58B	\$0.07B
2021	\$10.02B	\$0.64B	\$0.07B
2022	\$10.51B	\$0.95B	\$0.08B
2023	\$11.34B	\$1.22B	\$0.10B
2024	\$10.40B	\$1.17B	\$0.09B
2025	\$10.43B	\$1.08B	\$0.10B
2026	\$9.64B	\$0.57B	\$0.06B

FY	Energy, Department of	Federal Acquisition Service	Defense Microelectronics Activity (DMEA)	All other
2016	\$0.00B	\$0.00B	\$0.01B	\$-0.02B
2017	\$0.00B	\$0.00B	\$0.00B	\$0.00B
2018	\$0.00B	\$0.00B	\$0.01B	\$-0.01B
2019	\$0.00B	\$0.00B	\$0.01B	\$0.00B
2020	\$0.01B	\$0.00B	\$0.00B	\$-0.00B
2021	\$0.02B	\$-0.00B	\$0.00B	\$-0.00B
2022	\$0.03B	\$0.00B	\$0.00B	\$-0.00B
2023	\$0.03B	\$0.00B	\$0.00B	\$-0.00B
2024	\$0.04B	\$0.00B	\$0.00B	\$0.00B
2025	\$0.04B	\$0.06B	\$0.00B	\$-0.01B

FY	Energy, Department of	Federal Acquisition Service	Defense Microelectronics Activity (DMEA)	All other
2026	\$0.04B	\$0.07B	\$0.00B	\$-0.01B

A10. Themes, space only

Earth observation and remote sensing

FY	obligated	actions	new awards	competed	single offer	newer firm
2016	\$0.96B	1,615	314	92.4%	0.0%	n/a
2017	\$0.97B	1,803	358	93.6%	0.0%	n/a
2018	\$0.74B	2,004	333	87.4%	2.4%	n/a
2019	\$0.46B	1,606	198	85.4%	0.0%	n/a
2020	\$0.33B	1,392	108	96.3%	0.0%	n/a
2021	\$0.39B	1,047	10	90.0%	0.0%	22.2%
2022	\$0.13B	472	8	87.5%	100.0%	0.0%
2023	\$0.23B	330	11	81.8%	n/a	11.1%
2024	\$0.15B	219	4	50.0%	100.0%	0.0%
2025	\$0.12B	212	6	33.3%	n/a	0.0%
2026	\$0.09B	130	4	50.0%	100.0%	50.0%

Satellite communications and constellations

FY	obligated	actions	new awards	competed	single offer	newer firm
2016	\$0.32B	192	42	90.5%	0.0%	n/a
2017	\$0.35B	224	38	100.0%	0.0%	n/a
2018	\$0.15B	229	35	85.7%	9.1%	n/a
2019	\$0.10B	207	28	85.7%	0.0%	n/a
2020	\$0.04B	127	7	71.4%	0.0%	n/a
2021	\$0.00B	86	1	0.0%	n/a	n/a
2022	\$0.01B	49	8	75.0%	20.0%	16.7%
2023	\$0.02B	54	7	71.4%	33.3%	40.0%
2024	\$0.06B	45	1	100.0%	100.0%	100.0%
2025	\$0.08B	68	1	100.0%	n/a	100.0%
2026	\$0.07B	42	2	0.0%	n/a	n/a

Launch and in space transportation

FY	obligated	actions	new awards	competed	single offer	newer firm
2016	\$1.25B	388	56	78.6%	0.0%	n/a
2017	\$1.28B	401	50	88.0%	0.0%	n/a
2018	\$1.41B	357	42	90.5%	4.5%	n/a
2019	\$1.77B	348	33	78.8%	0.0%	n/a
2020	\$2.28B	376	28	64.3%	0.0%	n/a

FY	obligated	actions	new awards	competed	single offer	newer firm
2021	\$2.66B	397	13	61.5%	14.3%	37.5%
2022	\$2.49B	373	4	0.0%	n/a	n/a
2023	\$2.82B	303	8	37.5%	0.0%	33.3%
2024	\$2.75B	289	5	40.0%	0.0%	50.0%
2025	\$2.42B	352	3	0.0%	n/a	n/a
2026	\$2.12B	333	5	0.0%	n/a	n/a

In space manufacturing and servicing

FY	obligated	actions	new awards	competed	single offer	newer firm
2016	\$0.00B	13	8	87.5%	0.0%	n/a
2017	\$0.01B	28	10	100.0%	0.0%	n/a
2018	\$0.00B	40	14	100.0%	8.3%	n/a
2019	\$0.03B	47	10	80.0%	0.0%	n/a
2020	\$0.01B	38	11	72.7%	14.3%	n/a
2021	\$0.00B	37	6	66.7%	0.0%	75.0%
2022	\$0.00B	30	4	75.0%	n/a	0.0%
2023	\$0.00B	22	1	100.0%	n/a	0.0%
2024	\$0.00B	5	0	n/a	n/a	n/a
2025	\$0.00B	8	0	n/a	n/a	n/a
2026	\$0.00B	8	0	n/a	n/a	n/a

Space energy and power

FY	obligated	actions	new awards	competed	single offer	newer firm
2016	\$0.05B	136	53	98.1%	2.7%	n/a
2017	\$0.02B	133	45	97.8%	6.1%	n/a
2018	\$0.02B	167	45	88.9%	4.0%	n/a
2019	\$0.05B	142	23	82.6%	0.0%	n/a
2020	\$0.07B	139	27	88.9%	0.0%	n/a
2021	\$0.04B	117	7	57.1%	0.0%	25.0%
2022	\$0.06B	97	3	66.7%	0.0%	50.0%
2023	\$0.04B	57	3	33.3%	n/a	0.0%
2024	\$0.04B	70	6	66.7%	25.0%	50.0%
2025	\$0.03B	42	1	0.0%	n/a	n/a
2026	\$0.01B	30	2	0.0%	n/a	n/a

Ground segment and data

FY	obligated	actions	new awards	competed	single offer	newer firm
2016	\$3.41B	2,357	107	30.8%	5.6%	n/a
2017	\$3.54B	2,363	99	26.3%	9.1%	n/a
2018	\$3.52B	2,637	212	11.3%	33.3%	n/a

FY	obligated	actions	new awards	competed	single offer	newer firm
2019	\$2.48B	2,071	66	28.8%	0.0%	n/a
2020	\$1.12B	826	27	29.6%	n/a	n/a
2021	\$0.87B	615	3	33.3%	0.0%	0.0%
2022	\$1.00B	475	4	0.0%	n/a	n/a
2023	\$0.55B	240	3	33.3%	0.0%	0.0%
2024	\$0.47B	181	0	n/a	n/a	n/a
2025	\$0.60B	214	0	n/a	n/a	n/a
2026	\$0.50B	142	0	n/a	n/a	n/a

A11. Top five vendor keys, all years

view	vendor key (as recorded)	share of dollars
full scope	Lockheed Martin Corporation	30.8%
full scope	Raytheon Company	8.0%
full scope	Northrop Grumman Systems Corporation	6.7%
full scope	Boeing Company, The	6.2%
full scope	Raytheon Company	6.1%
space only	NASA laboratory operator (FFRDC)	16.8%
space only	The Boeing Company	13.2%
space only	Lockheed Martin Corporation	11.0%
space only	Northrop Grumman Systems Corporation	7.9%
space only	NASA laboratory operator (FFRDC)	4.6%

A12. Source

FPDS public ATOM feed,

<https://www.fpds.gov/ezsearch/FEEDS/ATOM?FEEDNAME=PUBLIC>, one query per code family and fiscal year. 41,887 pages, fetched 2026-10-13T20:07:11Z to 2026-10-13T21:02:44Z. Fetch log SHA256

482c82273d505c39417c3d9fe9f1c9b3e75ab0c38e488f71b04ff41856b5c7ab. No other file was fetched.