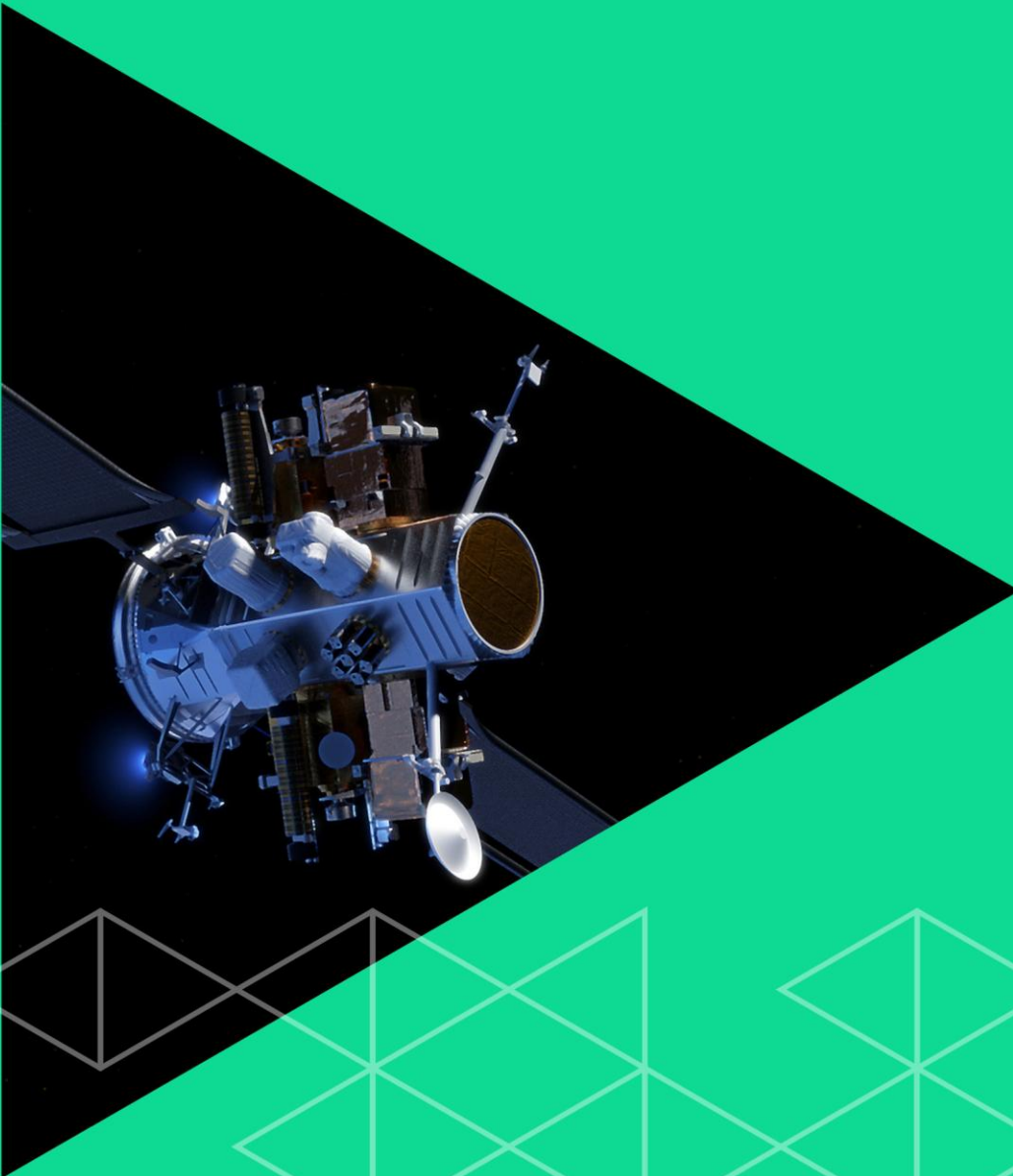

The Puget Sound Region Space Economy

Competitive Position, Industry Assets,
Workforce, and Growth Opportunities

By Victoria DePalma, Ph.D., of Greater Seattle Partners

Executive Brief



Key Findings

- Scale is a real advantage. Greater Seattle has the second largest broad aerospace workforce in the benchmark set and exceptional concentration in aircraft and space-related manufacturing.
- Aerospace + technology is the region's clearest differentiator. Boeing's ongoing production scale and deep aerospace capabilities combine with Amazon, Microsoft, and broader tech sector strengths in cloud, AI, software, cybersecurity, automation, and data infrastructure.
- Regional strengths span satellite manufacturing and connectivity, propulsion, advanced spacecraft and orbital mobility, orbital computing, software and data, and advanced manufacturing/testing. 68% of all active satellites in Earth orbit were manufactured in Washington state.
- Commercial space entrepreneurship is highly specialized. Space-focused firms represent 64% of identified aerospace startups founded since 2016 and 93.5% of the cohort's recorded funding.
- Recent investment is becoming physical capacity. New and expanding space companies are adding engineering and manufacturing operations in Kent, Woodinville, Bothell, Redmond, Seattle, and other regional locations.
- Maintaining the region's competitive position will require continued investment. Workforce throughput, industrial capacity, supplier readiness, business costs, incentive competitiveness, and federal market connectivity should be the main focuses.

Executive Summary

The Puget Sound Region has one of the nation's largest and most differentiated aerospace and commercial space clusters. Its competitive position is rooted in the convergence of a very large aerospace manufacturing base, high volume satellite activity, propulsion and spacecraft development, and a technology ecosystem with globally significant cloud, software, artificial intelligence, cybersecurity, and automation capabilities. The region is best understood as a manufacturing and technology hub rather than a launch-centered market.

The region's principal advantage is not a single company or industry segment, but the convergence of two large regional systems that increasingly reinforce one another. Boeing's ongoing regional presence, together with decades of commercial aircraft production, has built deep aerospace engineering, manufacturing, supplier, quality, electronics, and production expertise. Amazon, Microsoft, and the broader technology ecosystem add globally significant capabilities in cloud computing, artificial intelligence, software, cybersecurity, automation, and data infrastructure. Commercial space increasingly requires both: the production disciplines needed to build reliable hardware at scale and the digital capabilities that make spacecraft more autonomous, connected, and compute-intensive.

Greater Seattle enters the next phase of commercial space growth from a position of strength, but peer regions are expanding workforce pipelines, industrial capacity, startup ecosystems, incentives, and federal market relationships. Maintaining the region's position will rest on whether it can scale the capabilities that distinguish it while addressing constraints that affect expansion decisions.

Greater Seattle Competitive Snapshot

Direct Regional Space Economic Output	\$8.1B	Preliminary Space Northwest estimate of the regional space economy's direct economic footprint
Total space-supported employment	34,200	Direct, indirect and induced employment by the space sector; preliminary Space Northwest estimate.
Washington's share of active satellites in Earth orbit	68%	More than two-thirds of all active satellites in Earth orbit were manufactured in Washington State
Guided Missile & Space Vehicle Manufacturing	5,456 jobs	More space-specific manufacturing measure
Guided Missile & Space Vehicle Manufacturing LQ	4.84	Nearly 5x national concentration; #4 among benchmark MSAs
Broad aerospace workforce	115,130 jobs	#2 among benchmark MSAs; deep labor and supplier base relevant to space firms
Aircraft Manufacturing LQ	18.20	Illustrates exceptional depth of the underlying aerospace platform
Space startups since 2016	16	#4 among benchmark MSAs; 64% of Greater Seattle's identified aerospace startups
Recorded space startup funding	\$3.48B	Third largest total among benchmark MSAs
Core regional proposition	Aerospace + technology	Manufacturing, satellites, cloud/software, AI
Identified 2026 federal award value	\$143.9M	Conservative floor for locally based firms; excludes national awards without a regional share

Source: Lightcast Industry Snapshot Reports, Q3 2026 dataset; Crunchbase Startup Report, September 2026; Space Northwest 2026 Washington Space Economic Impact Report, preliminary findings; 2026 federal award sources listed in the full report.

1

Competitive Position and Regional Differentiation

The Puget Sound region's space economy has evolved from a regional aerospace base rooted in commercial aircraft production into a broader commercial space and technology ecosystem. Major anchors now span launch vehicles and propulsion, satellite manufacturing and broadband, spacecraft, ground systems, cloud computing, software, orbital computing, advanced manufacturing, and specialized services. The central competitive question is no longer whether the region participates in the space economy, but where it has defensible advantage and what conditions will determine whether that advantage expands.

Amazon Leo and SpaceX/Starlink reinforce regional strength in satellite production and connectivity. Blue Origin and Stoke Space anchor propulsion and launch-system engineering. Portal Space Systems and Starfish Space are building capabilities in maneuverable spacecraft, servicing, rendezvous and proximity operations, and responsive orbital missions. Starcloud and Sophia Space illustrate an emerging orbital computing segment that combines spacecraft engineering with cloud architecture,

AI, autonomous systems, and data infrastructure. The regional manufacturing and supplier base provides enabling capabilities across all of these activities.

Greater Seattle also competes differently from other leading U.S. space hubs. Los Angeles is the broadest manufacturing and commercial space competitor, Denver combines advanced commercial and national security space activity, Houston is centered on human spaceflight and NASA, Orlando is built around launch operations and infrastructure, and Washington, DC is a center of federal procurement, intelligence, policy, and government contracting. Greater Seattle’s strongest proposition is the intersection of high-value aerospace manufacturing with commercial satellites, privately developed spacecraft, software, cloud, AI, and a mature technical supply chain.

What Differentiates Greater Seattle	
Competitive Advantage	Why It Matters
Aerospace Manufacturing Depth	Greater Seattle has one of the nation’s deepest commercial aerospace ecosystems, providing production know-how, quality systems, technical labor, and supplier capabilities relevant to commercial space manufacturing.
Concentrated Satellite Production	Amazon Leo and SpaceX/Starlink reinforce regional depth in satellite production, RF systems, electronics, automation, operations, and specialized talent.
Cloud, Software, and AI Capability	Greater Seattle combines a major aerospace base with significant capabilities in cloud computing, software, AI, cybersecurity, and digital engineering, increasingly important to modern spacecraft and mission systems.
Diversified Emerging Space Portfolio	Companies including Stoke Space, Starfish Space, Portal Space Systems, Starcloud, Hubble Network, and Kapta Space broaden the regional ecosystem across orbital mobility, servicing, computing, sensing, communications, and other emerging applications.
Mature Supplier and Technical Services Ecosystem	Decades of aerospace activity have created regional depth in materials, electronics, machining, engineering, testing, design, and other specialized services that can support space companies as they scale.

These advantages are mutually reinforcing. Aerospace depth supplies production know-how and technical labor; satellite activity creates specialized demand and operating experience; technology capabilities support more software-defined and autonomous systems; emerging companies broaden the industry portfolio; and the supplier ecosystem provides a platform for scaling production.

2 Workforce and Talent

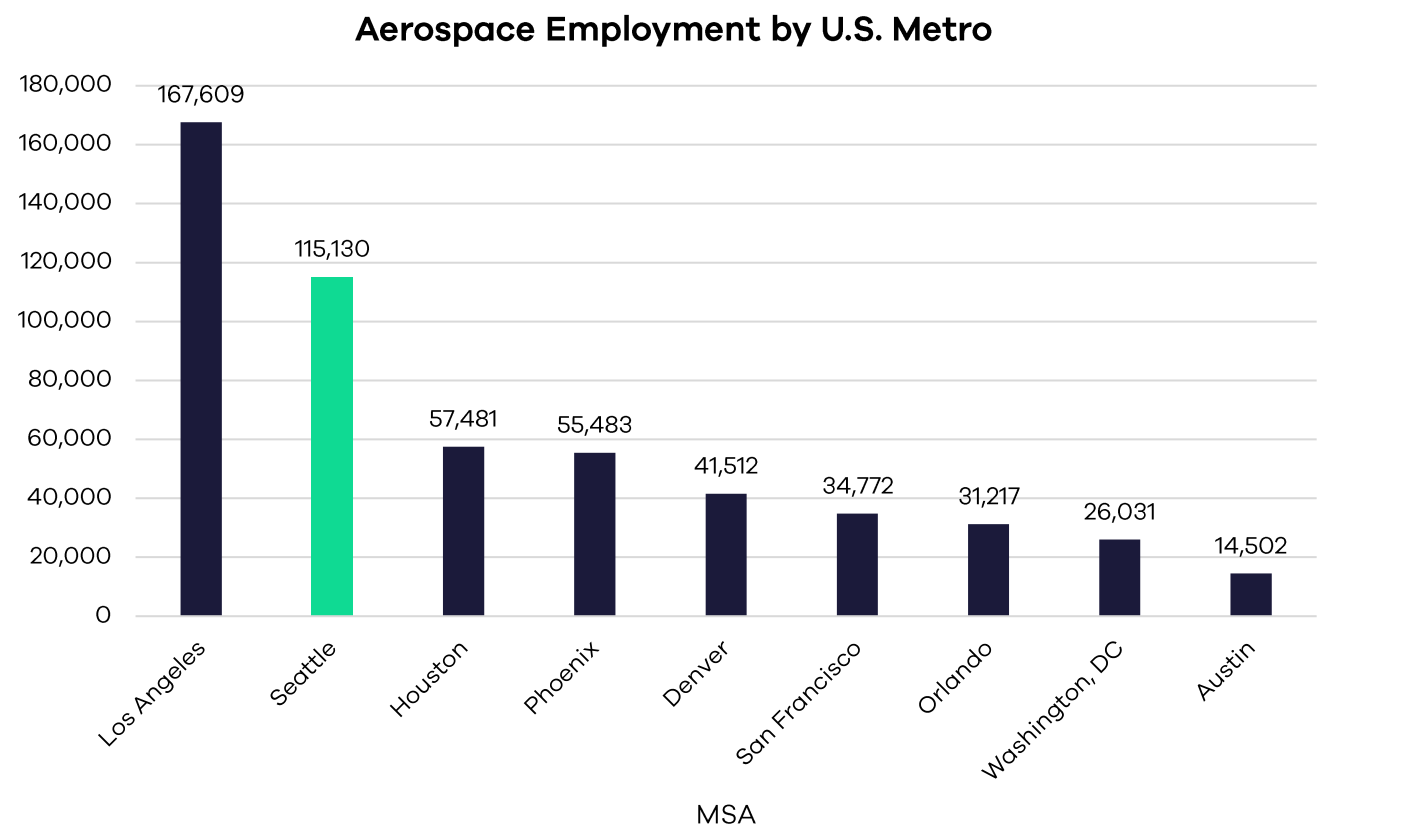
Greater Seattle has one of the largest and most specialized aerospace economies among benchmark regions. The region supports 115,130 jobs, second only to Los Angeles among the nine benchmark MSAs. In Guided Missile and Space Vehicle Manufacturing (NAICS 336414), Greater Seattle has 5,456 jobs, placing third in employment, while its location quotient of 4.84 ranks fourth in industry concentration. The region is even more dominant in Aircraft Manufacturing, ranking first among benchmark MSAs in both employment and location quotient. It also ranks third in both measures for Guided Missile and Space Vehicle Propulsion Unit and Propulsion Unit Parts Manufacturing.

The Seattle MSA has the highest earnings per aerospace job in the benchmark set at \$166,167. Broad aerospace employment grew 6% from 2020 to 2025, and Lightcast projects 3% growth from 2025 to 2030. Those broad measures include mature aerospace industries, so the report treats startup formation, private investment, company expansion, and new production capacity as more direct indicators of commercial space momentum.

Benchmark Workforce Comparison				
MSA	Jobs	Past Growth	Projected Growth	Earnings/job
Los Angeles	167,609	1%	2%	\$149,820
Seattle	115,130	6%	3%	\$166,167
Houston	57,481	23%	6%	\$130,637
Denver	41,512	27%	12%	\$153,088
San Francisco	34,772	12%	0%	\$146,906
Orlando	31,217	26%	9%	\$137,270
Washington, DC	26,031	24%	6%	\$135,453
Austin	14,502	39%	19%	\$113,042
Phoenix	55,483	12%	5%	\$123,813

Note: Earnings per job are nominal, reflect differences in industry and occupational mix, and are not cost-of-living adjusted; cross-metro differences should not be interpreted as direct like-for-like labor-cost comparisons. Source: Lightcast Industry Snapshot Reports, Q3 2026 dataset. All reports use the same 36-industry aerospace definition and MSA geography.

Greater Seattle’s workforce pipeline spans high school STEM and career and technical education, community and technical colleges, university engineering and research, registered apprenticeships, and employer-specific training. Particularly relevant pathways include the Lake Washington Institute of Technology and Amazon Leo satellite technician program, Core Plus Aerospace and Boeing’s pre-employment pathways, Everett Community College/AMTEC, AJAC apprenticeships, Edmonds College/WATR, SpaceX internships and graduate engineer opportunities, and JCATI university-industry R&D partnerships.



3

Startups, Private Capital, and Federal Demand

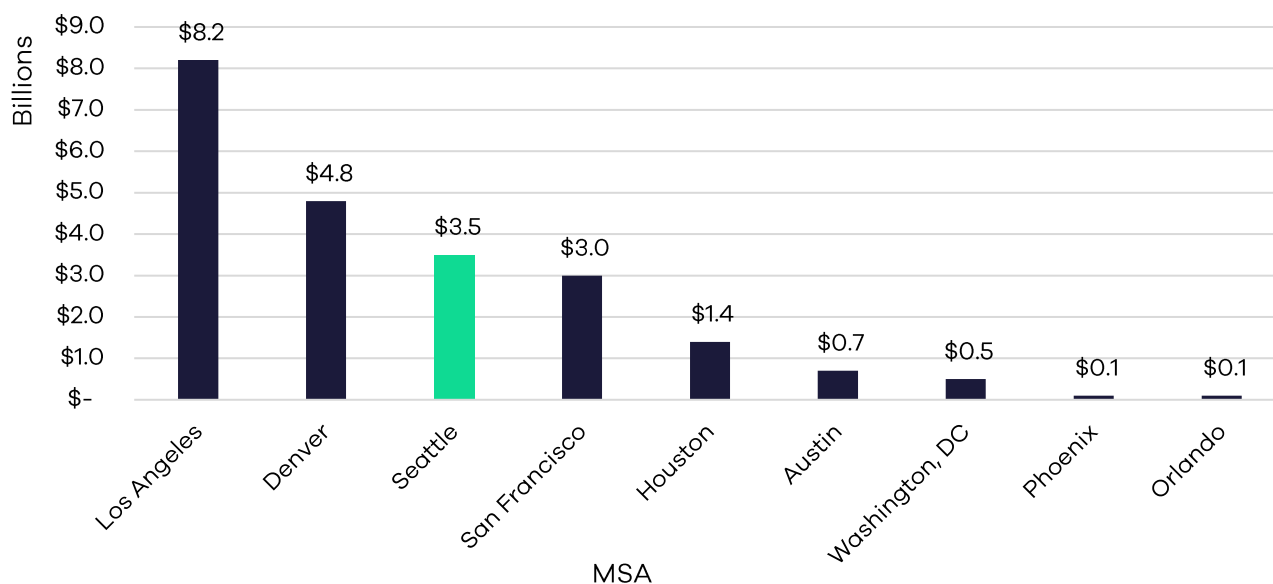
Startup activity provides a forward-looking measure of the region’s space specialization. The report identifies 25 Greater Seattle aerospace startups founded between 2016 and 2026, of which 16 are primarily space-focused. Space represents 64% of the region’s aerospace startups and approximately 93.5% of recorded funding. Those space startups account for approximately \$3.48 billion in recorded funding, the third largest total among the benchmark MSAs after Los Angeles and Denver.

The funding base is distributed across multiple parts of the commercial space value chain rather than a single niche. Stoke Space has raised approximately \$2.3 billion, Starcloud approximately \$450 million, Hubble Network approximately \$290.5 million, Starfish Space approximately \$174.6 million, Portal Space Systems approximately \$70.5 million, and other regional companies have attracted capital for spacecraft, propulsion, connectivity, sensing, orbital servicing, and computing. This diversity is important because it combines large growth-stage companies with continued startup formation.

Benchmark Startup Activity Since 2016

MSA	Total Aerospace Startups	Space Startups	Space Share	Total Aerospace Funding	Space Startup Funding	Space Share of Funding
Seattle	25	16	64.0%	\$3.72B	\$3.48B	93.5%
Houston	11	7	63.6%	\$1.63B	\$1.42B	87.3%
Denver	33	19	57.6%	\$5.13B	\$4.81B	93.7%
Los Angeles	104	40	38.5%	\$29.13B	\$8.15B	28.0%
Orlando	11	4	36.4%	\$492.9M	\$56.5M	11.5%
Washington, DC	34	11	32.4%	\$2.48B	\$460.7M	18.5%
San Francisco	147	41	27.9%	\$9.12B	\$3.02B	33.1%
Austin	18	2	11.1%	\$1.93B	\$696.3M	36.0%
Phoenix	5	2	40.0%	\$152.5M	\$135.1M	88.6%

Space Startup Funding Across Benchmark MSAs



Source: Crunchbase Startup Report, September 2026, with selected 2026 company and investor announcements used as cross-checks. Funding figures represent disclosed or database-recorded amounts rather than audited cumulative company totals.

Federal contracts are becoming an increasingly important complement to private capital. Publicly announced 2026 awards identify at least \$143.9 million in federal contract value awarded directly to Greater Seattle-based space companies. The identified baseline includes \$107.0 million in Space Development Agency and U.S. Space Force awards to Starfish Space, a \$30.0 million U.S. Space Force STRATFI contract to Gravitics, and a \$6.9 million NASA SBIR Phase III contract to Interlune. The report treats this as a conservative floor rather than a comprehensive measure of regional federal spending.

Blue Origin’s September 2026 selection by NASA to develop the Mars Telecommunications Network further demonstrates the scale of federal demand touching regional anchor companies. The contract has a maximum potential value of approximately \$700 million, but the full amount is not included in the Greater Seattle baseline because work may occur across Blue Origin’s national footprint. This distinction is important throughout the report: national company awards are not assumed to represent local economic activity unless the Greater Seattle share can be established.

Identified 2026 Federal Awards to Greater Seattle-Based Firms		
Regional company	Federal customer / program	Identified federal value
Starfish Space	Space Development Agency / U.S. Space Force	\$52.5M
Starfish Space	U.S. Space Force / APFIT	\$54.5M
Gravitics	U.S. Space Force / SpaceWERX STRATFI	\$30.0M
Interlune	NASA SBIR Phase III	\$6.9M
Identified 2026 regional baseline		\$143.9M

Sources: Starfish Space (2026b, 2026c); U.S. Securities and Exchange Commission filing for Gravitics (2026); NASA (2026a). Values are announced/current contract values or ceilings and should not be interpreted as obligations or expenditures. See Appendix B.

The competitive gap is not an absence of federal demand. Rather, Greater Seattle has comparatively limited proximity to federal acquisition institutions, program offices, and customer networks concentrated in markets such as Washington, DC, Denver, Houston, and Orlando. Strengthening federal market connectivity is a strategic opportunity precisely because regional companies have already demonstrated an ability to win NASA, Space Force, and other federal work.

4

Growth Opportunity and Competitive Pressures

The World Economic Forum and McKinsey & Company project the global space economy to grow from \$630 billion in 2023 to approximately \$1.8 trillion by 2035, while Novaspaces estimates a more conservative path from \$626.4 billion in 2025 to \$1.01 trillion by 2034. The full report uses those ranges to illustrate the order of magnitude of potential growth, not to forecast Greater Seattle’s future output.

Using Greater Seattle's \$8.1 billion 2026 economic impact baseline, the report illustrates 2035 activity of approximately \$16.0 billion under a 5% annual growth assumption, \$20.9 billion at 7%, and \$27.1 billion at 9%. The difference between the 5% comparator and the 7%–9% growth paths is approximately \$4.9 billion to \$11.1 billion in annual regional economic activity by 2035. This is a directional measure of the economic value at stake, not a forecast.

5

Business Attraction, Physical Expansion, and Emerging Markets

Recent company decisions show that Greater Seattle's competitive proposition is translating into physical investment. Cowboy Space, a California-based company developing vertically integrated rockets and orbital AI data centers, established a Seattle-area engineering center in 2026 and later leased a 291,035-square-foot industrial facility in Kent. K2 Space selected the region for a new engineering operation focused on flight software, autonomy, and low-level satellite systems. Starcloud is establishing production lines for orbital data center spacecraft at a 100,000-square-foot manufacturing facility in Woodinville. Portal Space Systems is expanding production capacity in Bothell, and Zeno Power is growing its Seattle workforce and evaluating additional headquarters space.

These expansions matter because they show where Greater Seattle may have the strongest fit for future attraction and retention. The region is already strong in satellite manufacturing and connectivity and has an established aerospace supplier base. The clearest emerging opportunities identified in the report are orbital mobility and servicing, responsive spacecraft, orbital computing and AI infrastructure, software-defined and autonomous space systems, and supplier conversion from traditional aerospace into commercial space.

Orbital computing is a particularly strong example of aerospace-technology convergence. Starcloud relocated from Southern California to Redmond after identifying the region's concentration of satellite mass-production expertise around Amazon Leo and Starlink. Its growth, together with Sophia Space and Cowboy Space activity, suggests that orbital compute could become a differentiated regional specialization rather than simply another application within the broader space economy.

The report also identifies constraints that could affect company expansion: specialized workforce capacity, operating costs, taxes, and incentive competition, access to suitable industrial facilities, power, testing capacity, and suppliers, comparatively limited federal institutional proximity, dependence on out-of-region launch infrastructure, and more moderate projected percentage employment growth than some smaller peer markets. These constraints do not erase the region's advantages, but they shape how effectively those advantages can translate into future investment.



Image: Stoke Space HQ Kent, Washington

6 Strategic Priorities

The report organizes its strategic priorities around three goals: scaling the regional ecosystem, strengthening Greater Seattle's external market position, and building a more precise evidence base for the space economy.

Pillar 1: Scale the Regional Space Ecosystem

Expand technician, manufacturing, electronics, quality, test, and engineering pathways; help qualified aerospace and advanced-manufacturing suppliers enter commercial space; protect industrial land, test capacity, power, logistics access, and other scaling infrastructure; and benchmark Washington's tax, financing, workforce, and sector-specific tools against peer states, with attention to whether existing aerospace programs adequately serve emerging commercial space firms.

Pillar 2: Strengthen Greater Seattle's Market Position

Position the region around aerospace and technology convergence rather than a generic "space hub" message. Strengthen connections with NASA, the U.S. Space Force, the Department of Defense, and other federal customers, and support the emerging orbital-infrastructure cluster spanning servicing, maneuverable spacecraft, propulsion, in-space logistics, sensing, and computing.

Pillar 3: Build the Evidence Base

Measure core space activity separately from broad aerospace through a repeatable framework for companies, employment, facilities, investment, federal contracts, and growth. Maintain an annual regional dashboard and use the forthcoming BERK study as the next economic impact baseline, with clear distinctions among contract ceilings, obligations, place of performance, and national awards with unknown regional shares.

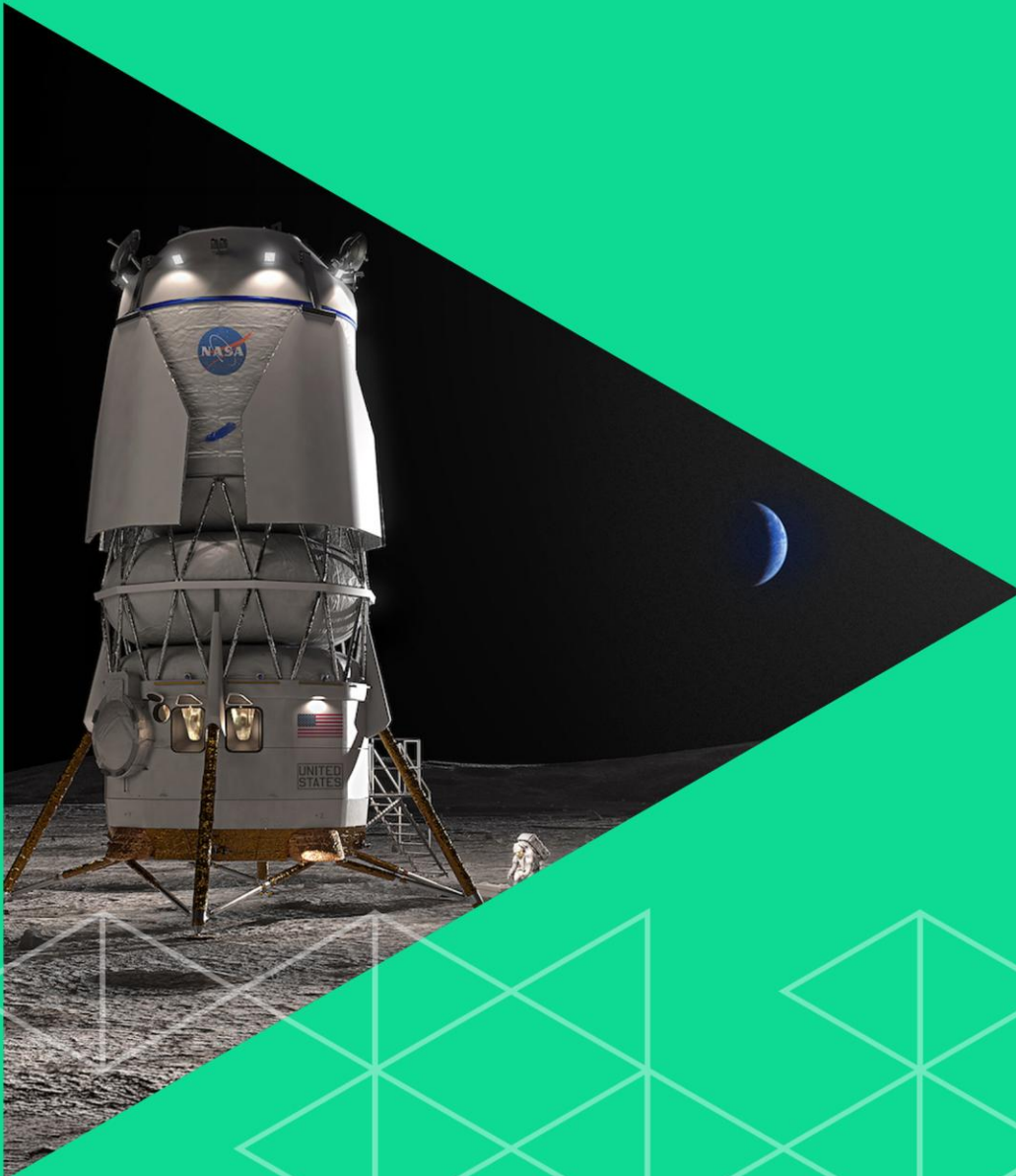
Conclusion

Greater Seattle does not need to become another Houston, Orlando, or Los Angeles to remain nationally significant in space.

Its strongest position is where aerospace manufacturing, commercial satellites, advanced spacecraft, cloud computing, software, AI, and a mature technical supply chain intersect. The challenge is to convert that advantage into sustained scale by expanding workforce throughput, industrial capacity, supplier readiness, federal market connectivity, and capital formation while maintaining a competitive business environment. Greater Seattle is a major aerospace hub whose manufacturing, technology, and talent base is supporting the emergence of a differentiated commercial space production and technology cluster.

Data Cutoff: Unless otherwise noted, data and company information included in this executive summary reflect information available through September 24, 2026.

Space Report





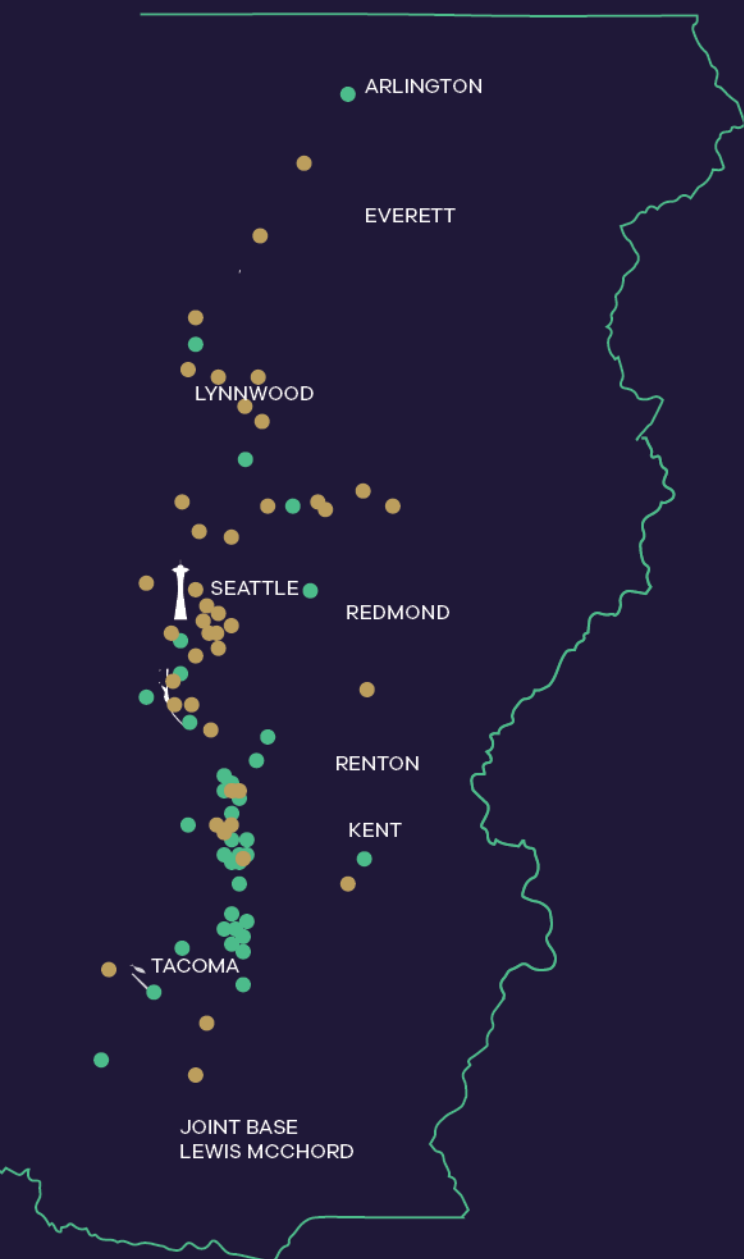
LEADING SPACE COMPANIES In GREATER SEATTLE

Rocketdyne
Amazon Leo - Primary
Engineering/
R&D Headquarters
Amazon Leo - Satellite
Manufacturing Facility
ARKA
Avaliant
AWS Workforce

LEADING SUPPLY CHAIN COMPANIES In GREATER SEATTLE

A&G Machine
Accurus Aero
Astronics AES
Aero Controls Inc
AeroGo Inc
AeroPlastics
Astronics
Buyken Metal Products
Cascade Gasket &
Manufacturing -
Collinear Group
Danner Corp
Dylan Aerospace
Exotic Metals
Fatigue Technologies
Flow International Corp
Front Panel Express
Gosiger
Hexagon
Hobart Machined
Products Inc -
Hytek Finishes
J&K Connectors
Janicki Industries
Laser Cutting Northwest
LMI Aerospace
M42 Space Engineering
Meritable Solutions LLC
Metal Shorts
Metaltest
Meyer Engineered Materials
Multi-Axis Technologies
Neumeier Engineering
OMAX
Orion Industries
Out of the Box Manufacturing
Pacific Metallurgical
Parker Aerospace
Rainier Rubber
RBK Manufacturing Inc
Renton Coil Spring
RS&H
Russtech Engineering
Sakco Precision Inc
Sea West Products
Second Order Effects
Shape Technologies Group
Skills
Spearman Corp
Specialty Metals Corporation
Teague
Thyssenkrupp Aerospace
Trelleborg FKA
w5engineering
Xanfab

Image: Blue Origin, New Glenn



BlackSky
Blue Origin
Boeing Space & Security
Constellation Space
Cowboy Space
Crane Aerospace &
Electronics
Eclipse Space
Firefly Aerospace
GHKN Engineering
Gravitics
GravityLab
Hubble Network
HyBird Space Systems
Integrate Space
Interlune
Juno Propulsion
JX Crystals
K2 Space
Kapta Space
Karman Space & Defense
Kymeta
LiftPort
Microsoft Azure Space
New Frontier Aerospace
Offplanet Research
Orbital Robotics
Orbite
Pacific Aerospace Launch
& Spaceport
Planet Enterprises
Portal Space Systems
PowerLight Technologies
Precursor
Pulse Space
Radian Aerospace
RBC Signals
Reach Space Technologies
Relativity Space
Rocket Propulsion Systems
Sienna Technologies
Sophia Space
Space Flight
Space Valves
SpaceLaunch
SpaceRig
SpaceX Starlink
StarCloud
Starfish Space
Stoke Space
The Radiation Team
The Space Age
TLG Aerospace
Wave Motion Launch
WiBotic
Xplore
Zeno Power

This report assesses the Puget Sound region’s competitive position in the U.S. space economy, with emphasis on the region's commercial space capabilities, aerospace industrial base, workforce, innovation ecosystem, infrastructure, and position relative to peer space hubs. It combines quantitative benchmarking, company and startup analysis, secondary research, and stakeholder interviews to identify the capabilities that differentiate the Puget Sound region and the opportunities and constraints that could shape future growth.

Contents

Executive Summary _____ 15

1 Introduction and Research Questions _____ 17

2 Methodology and Definitions _____ 17

3 Greater Seattle's Space Economy _____ 21

4 Greater Seattle's Space Value Chain and Capabilities _____ 24

5 Workforce and Talent _____ 27

6 Startups, Capital & Federal Funding _____ 33

7 Infrastructure and Supply Chain _____ 38

8 Competitive Benchmarking _____ 39

9 Growth Opportunities and Competitive Risks _____ 46

10 Business Attraction and Physical Expansion _____ 51

11 Industry Perspectives _____ 52

12 Strategic Priorities _____ 57

Conclusion _____ 60

Appendices _____ 61

Funding Disclosure
This report was produced by Greater Seattle Partners with financial support from Amazon. Greater Seattle Partners conducted the research, analysis, and preparation of the report

Executive Summary

The Puget Sound region is one of the nation's largest and most differentiated aerospace and commercial space clusters. Its competitive position rests on the convergence of a very large aerospace manufacturing base, high volume satellite activity, propulsion and spacecraft development, and a technology ecosystem with globally significant cloud, software, artificial intelligence, cybersecurity, and automation capabilities.

1. The Puget Sound region's large aerospace base provides a platform for space growth.

The Seattle Metropolitan Statistical Area (MSA) supports 115,130 jobs across the report's broad 36-industry aerospace definition, making it the second largest aerospace labor market in the benchmark group after Los Angeles MSA. Within Guided Missile and Space Vehicle Manufacturing, a more space-specific category, Greater Seattle supports 5,456 jobs, ranking #3 among benchmark MSAs in employment, and has a location quotient of 4.84, ranking #4 in concentration.

2. The region's strongest differentiator is aerospace-technology convergence.

The combination of aerospace experience and technology talent is a defining regional advantage. Boeing's ongoing production scale and deep aerospace capabilities combine with software, cloud, AI, and digital capabilities associated with Amazon, Microsoft, and the broader technology economy. This combination is increasingly valuable as spacecraft and satellite systems become more software-defined, autonomous, connected, and computationally intensive.

3. The commercial space cluster is broader than launch.

The Puget Sound region is especially competitive in satellite production and connectivity, propulsion, advanced spacecraft, orbital mobility and servicing, ground systems, space computing, and the manufacturing and software capabilities that support those activities. The region is therefore best understood as a manufacturing and technology hub rather than a launch-centered market. A space hub does not need local orbital launch infrastructure if logistics can efficiently move hardware to launch sites.

4. The region's space ecosystem is diversifying while building on a world-class aerospace foundation.

Boeing is a foundational anchor of Greater Seattle's aerospace economy and continues to develop the advanced engineering, manufacturing, and technical workforce that supports the region's future. In addition to this, the region's space ecosystem continues to diversify with Blue Origin, Amazon Leo, SpaceX/Starlink, Stoke Space, Starfish Space, Portal Space Systems, BlackSky, Starcloud, Hubble Network, and others expanding Greater Seattle's capabilities across commercial satellites, propulsion, orbital infrastructure, computing, sensing, spacecraft mobility, and in-space servicing. Established aerospace leaders and emerging space companies alike are building the workforce, technical expertise, and industrial capacity that position the region for continued leadership in the next generation of aerospace and space.

5. The Puget Sound region competes differently from other leading U.S. space hubs.

The Puget Sound region follows a distinctly commercial and technology-oriented model. Houston is centered on human spaceflight and NASA; the Space Coast on launch; Washington, DC area on federal procurement and intelligence; Denver on national security space; and Los Angeles on breadth and scale. Greater Seattle's strongest case is high-value manufacturing, commercial satellites, privately developed spacecraft, software and cloud, AI, and a mature aerospace supply chain, positioning the region where space hardware and technology increasingly converge.

6. Sustaining the region's competitive position will require continued investment.

Competing space hubs are expanding workforce pipelines, industrial capacity, startup ecosystems, incentives, and federal market relationships. Greater Seattle does not need to replicate Houston, Denver, Los Angeles, or the Space Coast, but it does need to continue scaling the capabilities that distinguish it. Workforce throughput, industrial capacity, supplier readiness, business costs, and federal connectivity will determine whether today's advantages translate into the next generation of space sector investment.

Greater Seattle Competitive Snapshot

Direct Regional Space Economic Output	\$8.1B	Preliminary Space Northwest estimate of the regional space economy's direct economic footprint
Total space-supported employment	34,200	Direct, indirect and induced employment by the space sector; preliminary Space Northwest estimate.
Washington's share of active satellites in Earth orbit	68%	More than two-thirds of all active satellites in Earth orbit were manufactured in Washington State
Guided Missile & Space Vehicle Manufacturing	5,456 jobs	More space-specific manufacturing measure
Guided Missile & Space Vehicle Manufacturing LQ	4.84	Nearly 5x national concentration; #4 among benchmark MSAs
Broad aerospace workforce	115,130 jobs	#2 among benchmark MSAs; deep labor and supplier base relevant to space firms
Aircraft Manufacturing LQ	18.20	Illustrates exceptional depth of the underlying aerospace platform
Space startups since 2016	16	#4 among benchmark MSAs; 64% of Greater Seattle's identified aerospace startups
Recorded space startup funding	\$3.48B	Third-largest total among benchmark MSAs
Core regional proposition	Aerospace + technology	Manufacturing, satellites, cloud/software, AI
Identified 2026 federal award value	\$143.9M	Conservative floor for locally based firms; excludes national awards without a regional share

Sources: Lightcast Industry Snapshot Reports, Q3 2026 dataset, using MSA geography, the report's 36-industry aerospace definition, and selected industry location quotients; Crunchbase Startup Report, September 2026; Space Northwest 2026 Washington Space Economic Impact Report preliminary findings; 2026 federal award sources listed in Appendix B.

Introduction and Research Questions

Greater Seattle's space economy has evolved from a regional aerospace base rooted in commercial aircraft production into a broader commercial space and technology ecosystem. Major anchors now span launch vehicles and propulsion, satellite manufacturing and broadband, spacecraft, ground systems, cloud computing, software, and advanced manufacturing. The central question is therefore not whether Greater Seattle participates in the space economy, but where it has defensible competitive advantage and what conditions will determine whether that advantage expands.

Primary research question

How competitive is Greater Seattle as a U.S. commercial space industry cluster, what capabilities differentiate it from competing regions, and what factors will determine its ability to capture future space sector investment, innovation, and employment?

Supporting questions

- What is the scale and specialization of the region's aerospace industrial base?
- Which parts of the commercial space value chain are most strongly represented in Greater Seattle?
- How does the region compare with other major U.S. space hubs?
- What does the workforce evidence suggest about talent depth, demand, and constraints?
- What do startup and company activity suggest about emerging areas of specialization?
- What do regional stakeholders identify as the most important advantages and barriers?
- Which strategic priorities follow most directly from the evidence?

Methodology and Definitions

The space economy does not map cleanly to a single industry code or dataset. This study therefore uses multiple analytical lenses rather than treating broad aerospace activity as equivalent to direct space activity. The approach combines labor market benchmarking, company and startup analysis, secondary research, and interviews. Findings are strongest where these sources converge.

Data Cutoff

Unless otherwise noted, data and company information included in this report reflect information available through September 24, 2026. Data extracted from proprietary and public sources, including Lightcast, Crunchbase, FDI Markets, and other datasets, were collected or verified through this date.

Geographic scope

The primary unit of analysis is Greater Seattle. For the purposes of this report, "Puget Sound Region," "Greater Seattle," and "Seattle MSA" are all synonymous and refer to the Seattle-Tacoma-Bellevue MSA. Lightcast metro benchmarking uses Metropolitan Statistical Area (MSA) geographies so markets are compared on a consistent basis.

The U.S. Office of Management and Budget (OMB) delineates MSAs for federal statistical purposes. An MSA consists of one or more counties or county equivalent areas associated with an urban core of at least 50,000 people, plus adjacent counties with a high degree of social and economic integration measured primarily through commuting ties (Office of Management and Budget, 2023; U.S. Census Bureau, 2026). For this report, an MSA refers to the full county-based metropolitan geography, not only the cities named in the MSA title. All Lightcast comparisons use the corresponding MSA rather than city limits, Combined Statistical Areas (CSAs), or statewide geographies. Shorter labels such as "Greater Seattle" and "Los Angeles" refer to these MSA geographies in quantitative benchmark comparisons. Statewide Washington evidence is used only where metro-level information is unavailable and is identified accordingly.

Benchmark MSA Geographies	
Benchmark MSA	Counties / county equivalents included
Seattle-Tacoma-Bellevue, WA	King, Pierce, and Snohomish counties
Los Angeles-Long Beach-Anaheim, CA	Los Angeles and Orange counties
Phoenix-Mesa-Chandler, AZ	Maricopa and Pinal counties
Austin-Round Rock-San Marcos, TX	Bastrop, Caldwell, Hays, Travis, and Williamson counties
Denver-Aurora-Centennial, CO	Adams, Arapahoe, Broomfield, Clear Creek, Denver, Douglas, Elbert, Gilpin, Jefferson, and Park counties/county equivalents
San Francisco-Oakland-Fremont, CA	Alameda, Contra Costa, Marin, San Francisco, and San Mateo counties
Washington-Arlington-Alexandria, DC-VA-MD-WV	District of Columbia; MD: Charles, Frederick, Montgomery, and Prince George's counties; VA: Arlington, Clarke, Culpeper, Fairfax, Fauquier, Loudoun, Prince William, Rappahannock, Spotsylvania, Stafford, and Warren counties, plus the independent cities of Alexandria, Fairfax, Falls Church, Fredericksburg, Manassas, and Manassas Park; WV: Jefferson County
Orlando-Kissimmee-Sanford, FL	Lake, Orange, Osceola, and Seminole counties
Houston-Pasadena-The Woodlands, TX	Austin, Brazoria, Chambers, Fort Bend, Galveston, Harris, Liberty, Montgomery, San Jacinto, and Waller counties

Source: Office of Management and Budget, OMB Bulletin No. 23-01 (2023); U.S. Census Bureau, Metropolitan and Micropolitan Statistical Area Glossary (2026). MSA delineations shown are the OMB definitions effective July 2023.

Labor market benchmarking

The comparative labor analysis uses Lightcast Industry Snapshot Reports, Q3 2026, with a consistent 36-industry aerospace definition and MSA geography across markets. Measures include total jobs, past and projected employment growth, earnings per job, talent supply, hiring competition, and location quotient for selected industries. Location quotient is used to identify industries in which a region has an unusually high employment concentration relative to the national economy.

Workforce and industry data were analyzed using Lightcast, a labor market analytics platform that integrates government datasets with job postings and other employment information. Lightcast was used to evaluate employment, occupational trends, industry growth, earnings, talent supply, and hiring activity across metropolitan areas. Its standardized methodology allows for consistent comparisons across regions while providing more current labor market insight than many traditional government datasets alone.

Earnings per job are nominal, reflect differences in industry and occupational mix, and are not cost-of-living adjusted; cross-metro differences should not be interpreted as direct like-for-like labor cost comparisons.

How to Read the Employment Numbers	
Core space economy	Broad aerospace industrial base
Space Northwest 2026 Washington Space Economic Impact Report, preliminary findings: 34,200 total direct, indirect, and induced jobs associated with core space activity in 2026.	Lightcast 2026 benchmark: 115,130 jobs across the report's 36-industry aerospace definition. This is used to measure the labor and supplier base relevant to space firms, not direct space employment.

Federal award benchmarking

Federal award comparisons primarily use USAspending.gov award records and focus on obligated amounts rather than announced contract ceilings. Where a benchmark comparison is shown, awards are screened for a clear connection to space activity through the awarding agency, award description, Product and Service Code (PSC), NAICS classification, or named space program, and the reported place of performance is used where available. Because federal space work spans many procurement codes and some national contracts are performed across multiple locations, the peer-market table in Section 8 is illustrative rather than an exhaustive metro total. It should be read as evidence of the scale and type of federal activity present in each market, not as a ranking of total federal space spending. Because obligation totals can change as agencies modify awards, current federal contract reporting is also used to cross check recent modifications; the amounts shown in the benchmark table are point-in-time values verified for this report.

Startup and company analysis

The report includes a post-2016 startup comparison and a broader regional company inventory. For cross-metro startup benchmarking, companies are assigned to the metro of their headquarters to

maintain a consistent geographic rule. Startup funding is used as an indicator of disclosed capital formation rather than a complete measure of company resources.

Startup activity was analyzed using Crunchbase, a commercial database that tracks private companies, funding rounds, investors, acquisitions, and other venture activity. Crunchbase provides a consistent basis for comparing startup formation and disclosed funding across metropolitan areas, but private company data can be incomplete or lag company announcements. Funding figures should therefore be interpreted as disclosed or recorded amounts rather than audited cumulative totals.

Primary research

The report includes interviews with Portal Space Systems, Actuate Ventures, Starcloud, BlackSky, Metal Shorts, Sophia Space, and Teague. These interviews represent perspectives from spacecraft development, investment, startups, suppliers, and design/engineering services. Interview evidence is treated as qualitative evidence of stakeholder experience and is not presented as a statistically representative survey.

Limitations

- No single NAICS definition captures the commercial space economy; broader aerospace measures are used as an industrial base indicator, not as a direct estimate of space employment.
- Private company employment, revenue, and funding information can be incomplete or unavailable.
- Startup classification requires judgment, particularly for companies that serve both aerospace and space markets.
- Headquarters location and operating footprint are not always the same.
- Metro and statewide statistics are not interchangeable and are distinguished where used.
- Employment growth projections are estimates rather than guaranteed outcomes.



- Interview findings provide informed stakeholder perspectives but should not be interpreted as population-level measures.
- Regional federal award baseline figures are based on publicly announced contract values or ceilings and are not a complete measure of federal obligations, expenditures, or regional economic impact. The regional baseline excludes classified awards, subcontracting that cannot be attributed publicly, and national company awards for which the Greater Seattle share or place of performance cannot be established. The peer market federal comparison in Section 8 is separate and uses obligated amounts reported by [USAspending.gov](https://www.usaspending.gov).

3

Greater Seattle's Space Economy

Greater Seattle enters the current phase of commercial space growth from an unusually large industrial base. The region combines established aerospace manufacturing, commercial satellite production and operations, propulsion and launch engineering, spacecraft development, communications, ground infrastructure, and software-enabled services. This breadth gives Greater Seattle exposure to multiple stages of the space value chain rather than a single industry niche. The most recent completed comprehensive economic impact estimate is Space Northwest's 2026 forthcoming report, which models 2026 core space activity. It estimated approximately \$8.1 billion in direct economic activity, \$12.4 billion in total economic output, 34,200 direct, indirect and induced jobs, and \$3.9 billion in labor income (Space Northwest, 2026).

\$8.1B

Direct economic activity

34,200

Total jobs

\$3.9B

Labor income

\$79.7M

State tax revenue

Source: Space Northwest, 2026 Washington Space Economic Impact Report, preliminary findings

Anchor companies and emerging firms

Major anchors include Blue Origin, Amazon Leo (formerly Project Kuiper), SpaceX/Starlink, and Boeing. These firms are complemented by companies such as Stoke Space, Starfish Space, Portal Space Systems, BlackSky, Kymeta, RBC Signals, Xplore, and a newer startup cohort that includes Starcloud, Hubble Network, Kapta Space, and others. Together, these companies broaden the regional industry beyond traditional aerospace manufacturing and into satellite communications, orbital computing, spacecraft mobility, sensing, and space services.



Aerospace heritage remains a structural advantage

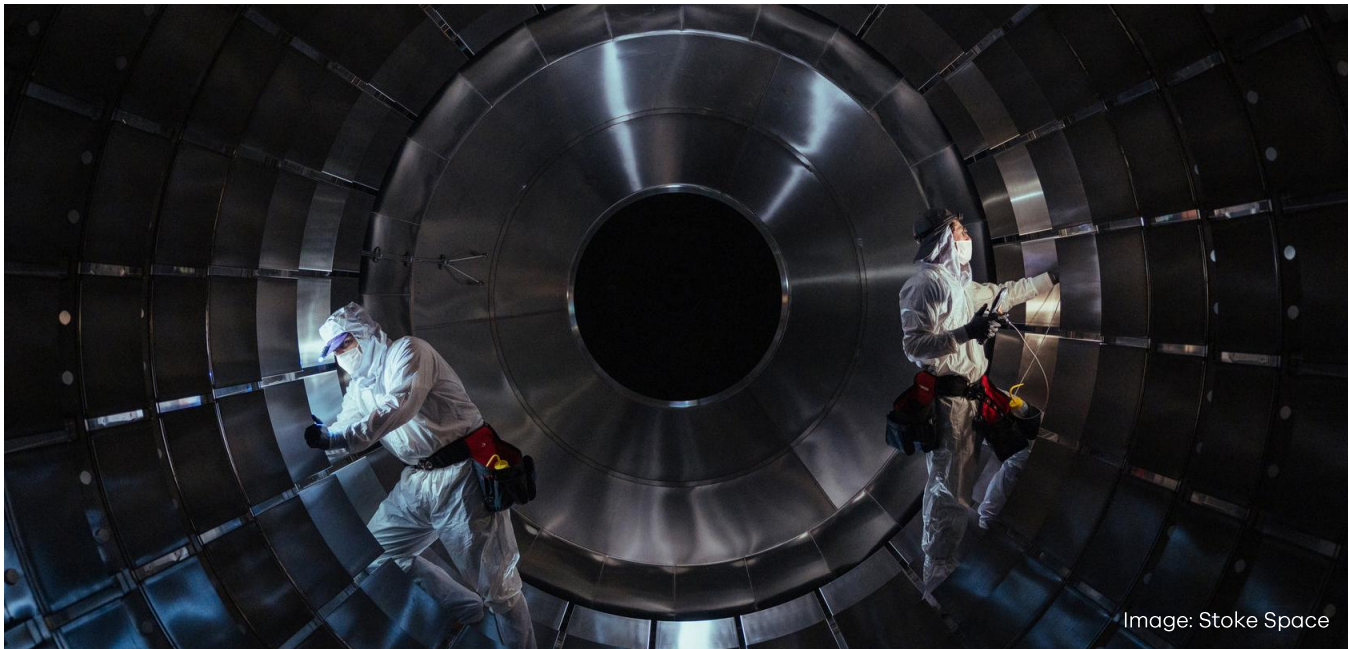
Boeing and the region's long commercial aircraft history created a manufacturing culture, supplier base, and pool of aerospace-experienced workers that newer space companies can draw upon. That depth is visible in precision manufacturing, composites, electronics, tooling, avionics, quality systems, testing, and engineering services. This accumulated capability is difficult for emerging space markets to reproduce quickly.

Technology convergence changes the competitive proposition

What increasingly distinguishes Greater Seattle is the adjacency of aerospace and technology. The region's cloud, AI, software, cybersecurity, automation, and data capabilities, anchored by Amazon, Microsoft, and others, are directly relevant to modern spacecraft and satellite systems. This matters because competitive advantage in space is shifting toward software defined systems, autonomy, resilient communications, digital engineering, and increasingly compute intensive missions.

That advantage is rooted in two large regional systems that increasingly reinforce one another. Boeing and decades of commercial aircraft production built deep aerospace engineering, manufacturing, supplier, quality, electronics, and production expertise. Amazon, Microsoft, and the broader technology ecosystem built globally significant capabilities in cloud computing, artificial intelligence, software, cybersecurity, automation, and data infrastructure. Commercial space increasingly requires both: production disciplines capable of building reliable hardware at scale and digital capabilities that make spacecraft more autonomous, connected, and compute-intensive.

Starcloud provides a tangible example of that convergence influencing company location. The company began in El Segundo before relocating to Redmond after identifying the region's concentration of satellite mass production expertise around Amazon Leo and Starlink (Greater Seattle Partners interview, 2026). Its subsequent expansion into orbital data center manufacturing shows how Greater Seattle's aerospace production base and technology ecosystem can combine to attract investment in emerging space markets.



Anchor Companies and Ecosystem Momentum

Greater Seattle's satellite economy is gaining scale through two of the world's largest commercial satellite constellations. SpaceX continues to manufacture Starlink satellites at its Redmond facility, which produced an average of approximately 70 satellites per week from December 2025 through April 2026, according to company disclosures. Amazon Leo is simultaneously expanding satellite production in Kirkland as it builds out its own low-Earth orbit broadband constellation. Together, these operations reinforce Greater Seattle's position as a major center for high-volume satellite manufacturing and engineering.

Amazon reported in its second quarter 2026 results that four additional launches had brought the Leo constellation to nearly 400 satellites in orbit, enough to support the beginning of initial satellite internet service during 2026 (Amazon.com, Inc., 2026a). Amazon also announced a planned acquisition of Globalstar that would add satellite infrastructure, spectrum assets, and future direct-to-device capabilities to Amazon Leo. The companies expect the acquisition to close in 2027, subject to regulatory and other closing conditions (Amazon.com, Inc., 2026b).

The regional entrepreneurship infrastructure is also becoming more formalized. Space Northwest, in partnership with the Commercial Space Federation and with local support from the City of Kent, launched a commercial space accelerator in 2026. The 12-week program is designed to support up to ten early-stage companies with investment readiness, commercialization, government and commercial market strategy, customer development, and integration into the space supply chain (Space Northwest, 2026). The initiative adds a company-scaling mechanism to a regional ecosystem historically strongest in engineering, manufacturing, and established company activity.

Greater Seattle is attracting externally headquartered space companies because of its engineering and aerospace workforce; substantial private investment is flowing into launch, spacecraft, satellite servicing, connectivity, and orbital computing, and federal contracts are becoming an increasingly important complement to venture capital. Notably, recent investment is translating into physical regional capacity that includes manufacturing, engineering, and production facilities in Kent, Woodinville, Bothell, Redmond, Kirkland, and other locations across Greater Seattle. The pattern reinforces Greater Seattle's competitive position at the intersection of aerospace manufacturing, commercial space, software, AI, and advanced technology.



Image: Amazon Leo



Image: Blue Origin

Greater Seattle's Space Value Chain and Capabilities

Greater Seattle's space economy functions as an interconnected value chain spanning satellite systems, propulsion, spacecraft, communications, software and data infrastructure, and advanced manufacturing. These capabilities allow the region to support multiple stages of commercial space activity, from design and component production to spacecraft operations and data processing.

1

Advanced Manufacturing & Testing

- Precision machining and tooling
- Electronics, composites and quality systems
- Engineering services and testing

Representative companies:
Broader regional aerospace supply chain

2

Propulsion & Launch Systems

- Launch-vehicle engineering
- Engines and propulsion technologies
- Launch development talent

Representative companies:
Blue Origin, Stoke Space, Rocketdyne

3

Satellite Manufacturing & Connectivity

- Satellite design and production
- Communications systems and terminals
- Mission services

Representative companies:
Amazon Leo, SpaceX/Starlink, BlackSky, Kymeta, Hubble Network, Xplore

4

Advanced Spacecraft & Orbital Mobility

- In-space mobility and maneuvering
- Rendezvous and proximity operations
- Servicing and responsive missions

Representative companies:
Portal Space Systems, Starfish Space

5

Space Computing Software & Data

- Cloud and AI-enabled mission support
- Autonomy, digital engineering, and data processing
- Mission operations software

Representative companies:
Starcloud and the broader regional cloud, AI, and software ecosystem

Satellite Manufacturing and Connectivity

Satellite manufacturing and communications represent one of the region's most established strengths. Amazon Leo and SpaceX/Starlink provide significant commercial satellite activity, while firms such as BlackSky, Kymeta, Hubble Network, and Xplore contribute capabilities in small satellites, communications systems, terminals, and mission services.

Propulsion and Launch Systems

Greater Seattle has a strong concentration of propulsion and launch engineering expertise. Blue Origin and Stoke Space anchor launch-system development, while Rocketdyne contributes satellite and spacecraft propulsion capabilities through its Redmond operations. These companies draw on a broader base of aerospace engineering, manufacturing, and technical talent. Although orbital launches occur outside the region, substantial engineering and development supporting launch systems and in-space propulsion takes place locally.

Advanced Spacecraft and Orbital Operations

An emerging cluster of companies is focused on spacecraft mobility and in-space operations. Portal Space Systems and Starfish Space are developing technologies related to maneuverable spacecraft, rendezvous and proximity operations, servicing, and responsive orbital missions, positioning the region within a growing segment of the commercial space economy.

Orbital Computing, Software, and Data

Orbital computing is emerging as one of the clearest examples of Greater Seattle's aerospace-technology convergence. The concept combines spacecraft and satellite engineering with highperformance computing, artificial intelligence, cloud architecture, autonomous systems, and data infrastructure, capabilities that are unusually concentrated in the region. Starcloud anchors this emerging niche, while Sophia Space and other companies add activity around orbital compute and AI infrastructure. Rather than representing an entirely new industry disconnected from Greater Seattle's existing economy, orbital computing builds directly on capabilities the region already has at scale.

Advanced Manufacturing and Testing

The region's aerospace and advanced manufacturing base provides enabling capabilities across the space value chain. Precision machining, electronics, composites, tooling, engineering services, quality systems, and testing infrastructure support spacecraft and satellite production and create opportunities for commercial space companies to scale within the region.

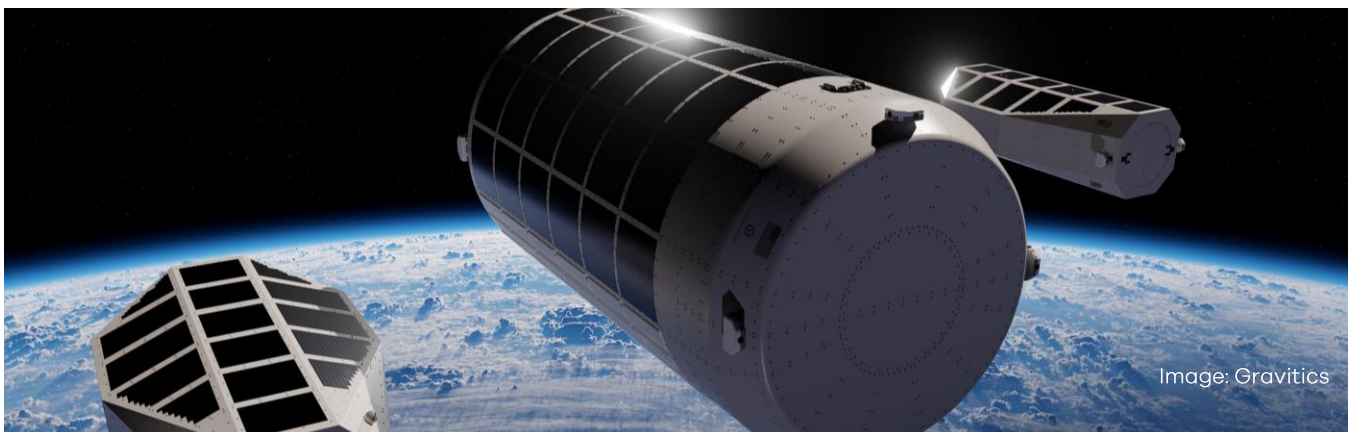


Image: Gravitics

GREATER SEATTLE'S SPACE INDUSTRY AT A GLANCE

Greater Seattle's advantage comes from the convergence of aerospace manufacturing, commercial space, satellites, cloud computing, AI, software, and advanced technology.

\$8.1B DIRECT ECONOMIC OUTPUT	4.84 LQ GUIDED MISSILE & SPACE VEHICLE MANUFACTURING	68% OF SATELLITES IN EARTH ORBIT MADE IN WA
16 SPACE STARTUPS SINCE 2016	\$3.31B RECORDED SPACE STARTUP FUNDING	\$143.9M IDENTIFIED 2026 FEDERAL SPACE AWARDS

THE COMPETITIVE ADVANTAGE

Greater Seattle : #2 in jobs, #1 in earnings per job, and #7 in projected percentage growth among the nine benchmark metros.

AEROSPACE Manufacturing • engineering • suppliers • quality systems • satellite production	+	TECHNOLOGY Cloud • AI • software • cybersecurity • data infrastructure
---	---	---

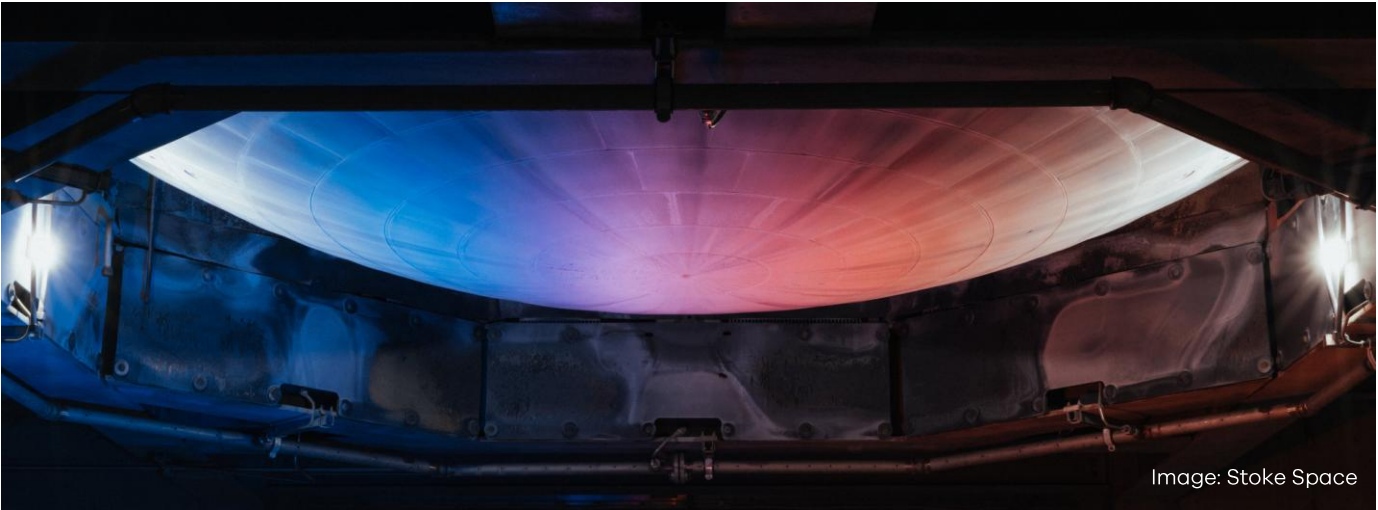


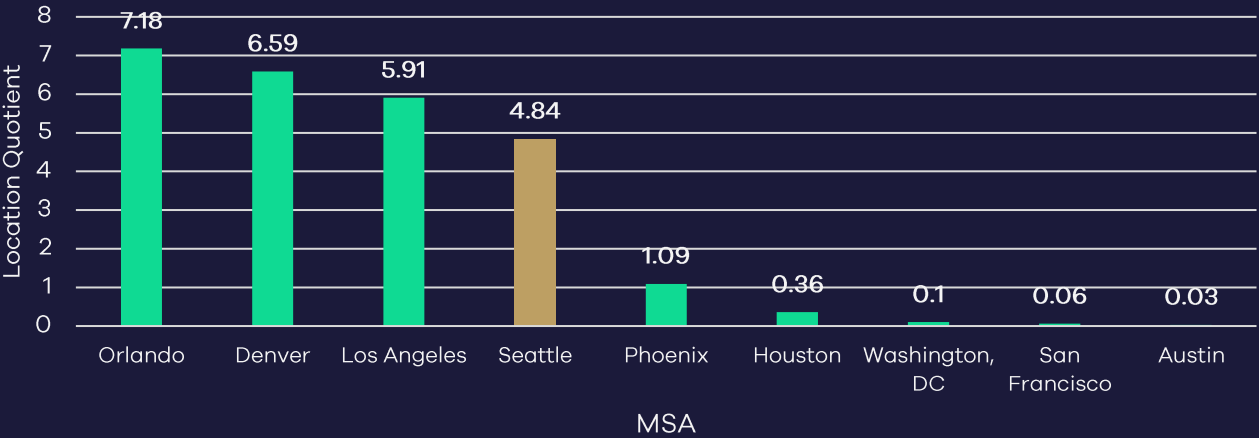
Image: Stoke Space

WHAT GREATER SEATTLE DOES IN SPACE

Advanced Manufacturing & Testing	Propulsion & Launch Systems	Satellite Manufacturing & Connectivity	Advanced Spacecraft & Orbital Mobility	Orbital Computing, Software & Data
--	-----------------------------------	--	---	---

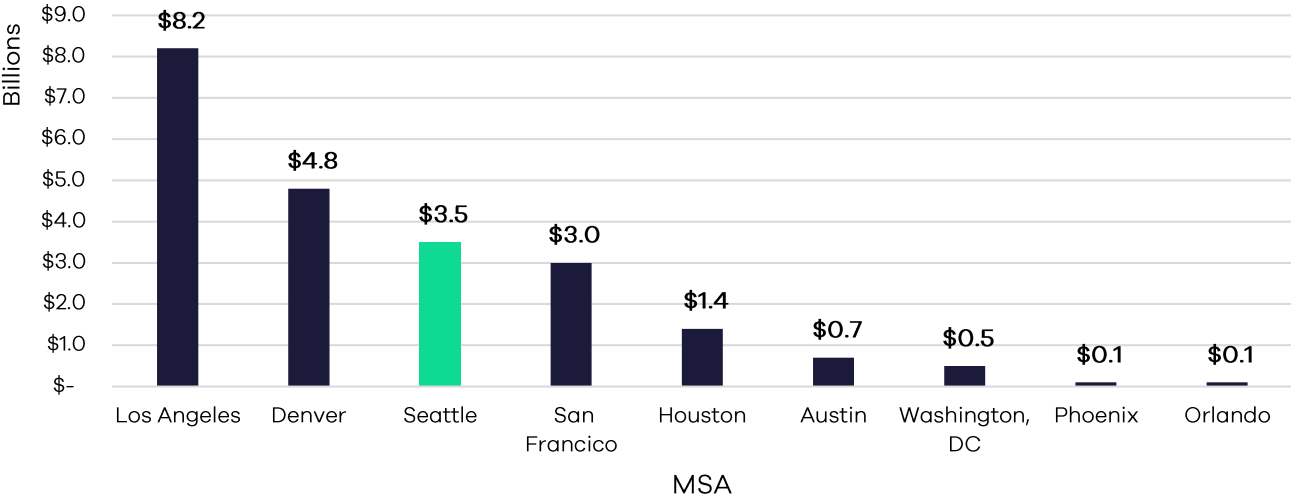


Guided Missile and Space Vehicle Manufacturing Concentration



Greater Seattle has nearly 5 times the national concentration of employment in guided missile and space vehicle manufacturing, ranking 4th among benchmark metros.

Space Startup Funding Across Benchmark MSAs



In Greater Seattle has over \$3 billion in startup funding and ranked 3rd among benchmark metros.
 Data current as of September 24, 2026, unless otherwise noted.

STRATEGIC PRIORITIES

A growing global space economy.

\$630B

Global space economy, 2023

→

~9% annual growth

\$1.8T

Global space economy, projected by 2035

SCALE THE ECOSYSTEM

Workforce • suppliers • industrial capacity • business environment

STRENGTHEN MARKET POSITION

Aerospace + technology • federal connectivity • orbital infrastructure

BUILD THE EVIDENCE BASE

Space-specific measurement • annual dashboard • federal investment tracking

Source: World Economic Forum & McKinsey & Company, 2024

5 Workforce and Talent

Greater Seattle has one of the largest and most specialized aerospace economies among the benchmark regions. The region has 115,130 aerospace industry jobs, second only to Los Angeles in the benchmark set. It also shows unusually high specialization across aircraft and space-related manufacturing categories and the highest earnings per job among benchmark metros. Together, these indicators point to a large, high value workforce and industrial base, while the earnings figure reflects a high compensation industry and occupational mix. More specifically, among the nine primary benchmark metros, Greater Seattle ranks #1 in both 2026 employment and location quotient for Aircraft Manufacturing (NAICS 336411); #3 in employment and #4 in location quotient for Guided Missile and Space Vehicle Manufacturing (NAICS 336414); and #3 in both employment and location quotient for Guided Missile and Space Vehicle Propulsion Unit and Propulsion Unit Parts Manufacturing (NAICS 336415).

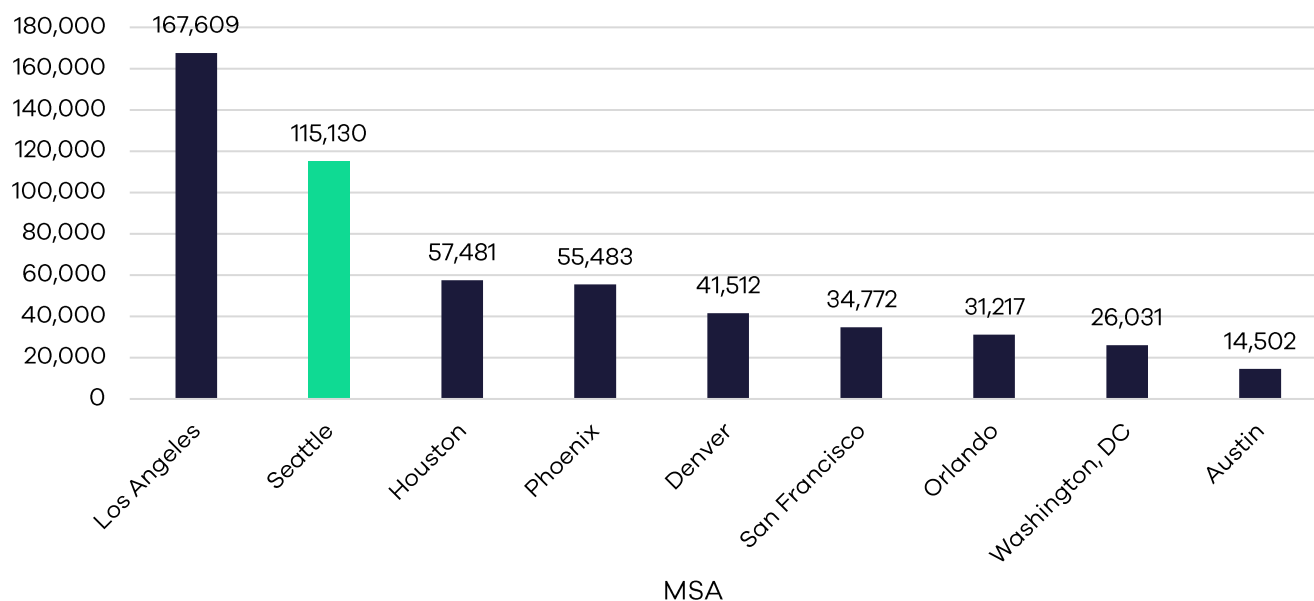
Benchmark Workforce Comparison

Greater Seattle ranking: #2 in jobs, #1 in earnings per job, and #7 in projected percentage growth among the nine benchmark metros.

Benchmark Workforce Comparison				
MSA	Jobs	Past Growth	Projected growth	Earnings/Job
Los Angeles	167,609	1%	2%	\$149,820
Seattle	115,130	6%	3%	\$166,167
Houston	57,481	23%	6%	\$130,637
Denver	41,512	27%	12%	\$153,088
San Francisco	34,772	12%	0%	\$146,906
Orlando	31,217	26%	9%	\$137,270
Washington, DC	26,031	24%	6%	\$135,453
Austin	14,502	39%	19%	\$113,042
Phoenix	55,483	12%	5%	\$123,813

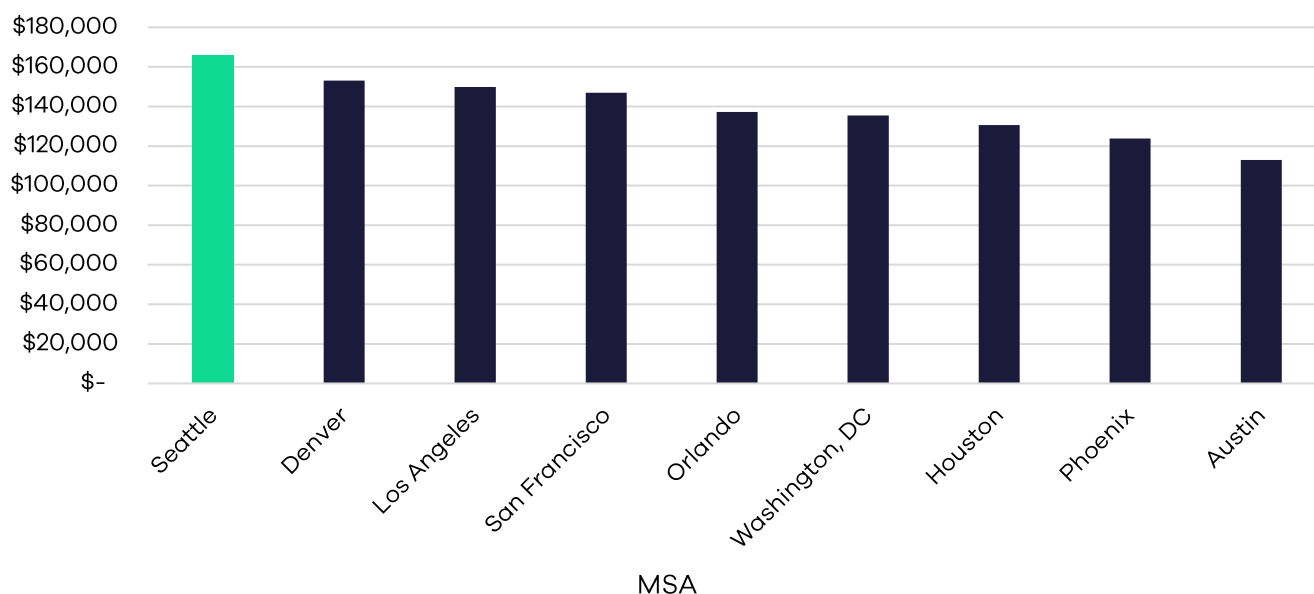
Note: Earnings per job are nominal, reflect differences in industry and occupational mix, and are not cost-of-living adjusted; cross-metro differences should not be interpreted as direct like-for-like labor-cost comparisons. Source: Lightcast Industry Snapshot Reports, Q3 2026 dataset. All reports use the same 36-industry aerospace definition and MSA geography.

Aerospace Employment by U.S. Metro



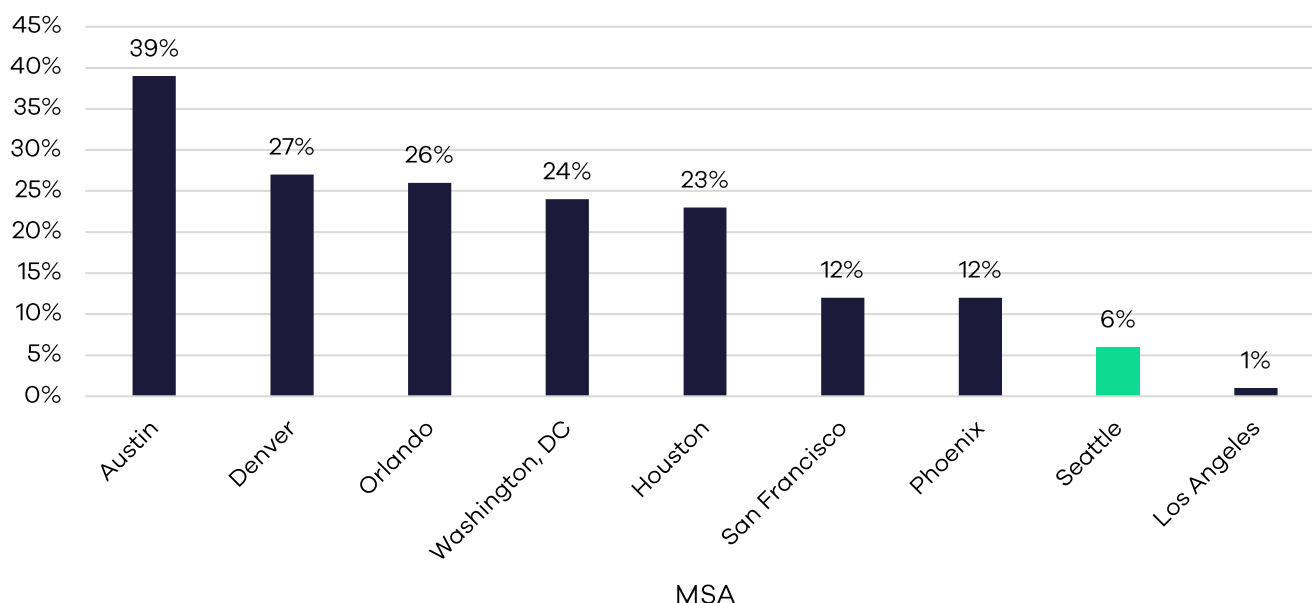
Greater Seattle is the second largest aerospace labor market in the benchmark set, providing unusually deep scale for a commercial space cluster. Its workforce is 69% the size of Los Angeles, but roughly double Houston and nearly three times Denver.

Earnings per Job by U.S. Metro



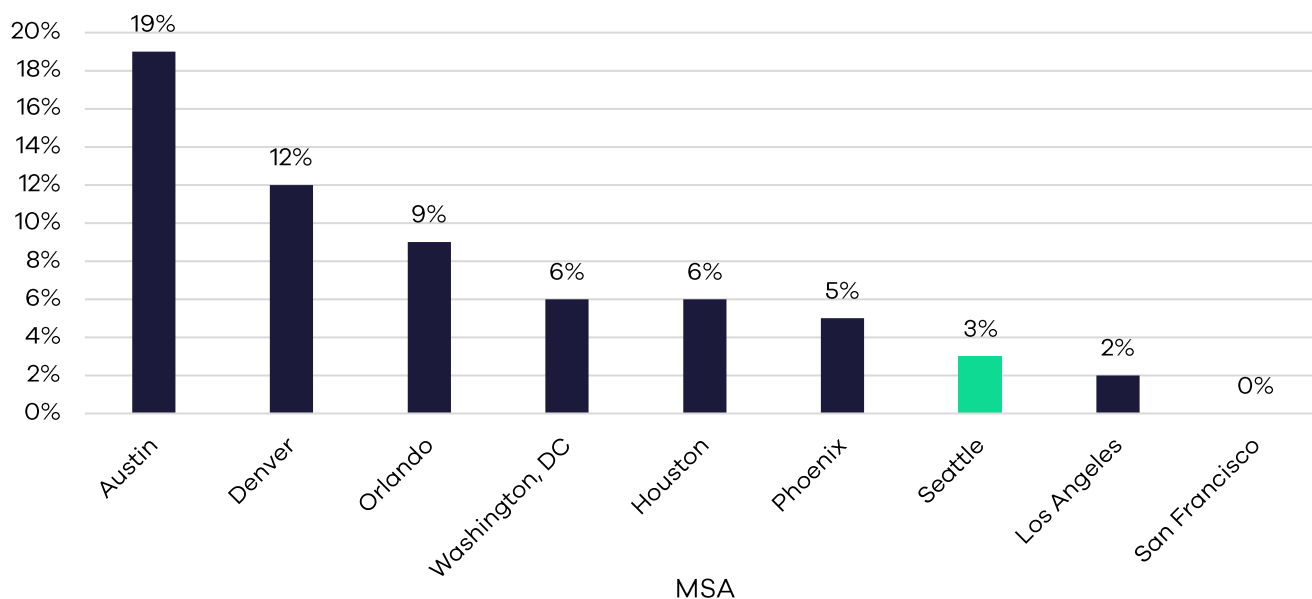
Greater Seattle has the highest earnings per job in the benchmark set. Earnings per aerospace job reach \$166,167, roughly \$13,000 above Denver and \$16,000 above Los Angeles. This supports a high value, high compensation workforce narrative, but the metric should not be read as a direct like-for-like measure of employer labor costs.

2020-2025 Aerospace Employment Growth



Greater Seattle's broad aerospace employment base grew 6% from 2020 to 2025. This measure includes mature industries such as aircraft manufacturing and should not be interpreted as a growth rate for the commercial space segment alone. Space sector momentum is more visible in startup formation, private investment, company expansion, and new production capacity discussed elsewhere in this report.

Projected Aerospace Job Growth (2025-2030)



Lightcast projects 3% growth across Greater Seattle's broad aerospace industrial base from 2025 to 2030. Because this measure includes mature aircraft and aerospace industries, it is not a forecast of commercial space growth. Recent space sector activity points to a more dynamic picture, including major capital raises, new facilities, company expansions, and continued startup formation.

Education and Technical Pathways

Greater Seattle has a multi-stage aerospace and space talent pipeline spanning high school STEM and career and technical education, community and technical colleges, university engineering and research, registered apprenticeships, and employer-specific training. The strongest regional advantage is the connection between these educational assets and major aerospace and space employers that help shape curricula, provide hands-on experience, and create direct pathways into manufacturing, engineering, and technician roles.

Institution / Program	Relevant Capabilities	Space Sector Relevance
University of Washington	Aeronautics & Astronautics; Husky Satellite Lab; multidisciplinary spacecraft projects	Advanced engineering, spacecraft R&D, systems integration, hands-on satellite experience
Washington NASA Space Grant Consortium	STEM education, scholarships, research opportunities, and NASA workforce development	Supports the long-term technical and scientific talent pipeline across Washington
Washington Aerospace Scholars (Museum of Flight + UW)	Statewide program for high school juniors combining a University of Washington online course on aerospace and space exploration with a summer residency and mission-design experience; students can earn five UW credits	Creates an early, explicitly space-focused STEM pathway and connects students with NASA scientists, aerospace professionals, university students, and industry mentors
Lake Washington Institute of Technology + Amazon Leo	Specialized six-month satellite technician pathway covering aerospace assembly, electronics manufacturing, fiber optics, avionics wiring, and related production skills; available to the public and eligible Amazon employees through Career Choice	Direct preparation for satellite manufacturing roles tied to Amazon Leo's Kirkland production operations and the region's growing spacecraft-production workforce
Everett Community College / AMTEC	Composites, precision machining, mechatronics, CAD/technical design, avionics, and aviation maintenance	Technician and manufacturing pathways in the Snohomish County aerospace corridor
AJAC	Registered apprenticeships in machining, CNC, industrial maintenance, production, automation, and related manufacturing occupations	Employer driven upskilling and apprenticeship pathways across King, Pierce, and Snohomish counties

Institution / Program	Relevant Capabilities	Space-Sector Relevance
Core Plus Aerospace + Boeing	Two-year advanced manufacturing curriculum used at 55 high schools and skills centers; Boeing and OSPI support teacher training and Boeing hosts a summer Student Development Program	Builds an early manufacturing pipeline; more than 1,500 Core Plus Aerospace graduates have been hired at Boeing since 2015
Boeing Pre-Employment Training Program (BPET)	Accelerated hiring pathway for graduates of pre-certified high school, skills center, and college manufacturing programs; qualifying applicants for select entry-level roles can bypass the traditional interview step	Converts classroom manufacturing training into a direct employment pathway; more than 250 people were hired at Boeing through BPET in 2025
Boeing Skilled Trades Academy + Clover Park Technical College	Free six-week hands-on assembly and electrical training for veterans, transitioning service members, military spouses, and dependent children; includes industry-recognized credentials and BPET certification	Expands the South Puget Sound skilled manufacturing pipeline and provides direct hire pathways into Boeing and other regional manufacturers
Edmonds College / WATR + Boeing	12-week certificates in manufacturing core, assembly, composites, quality assurance, and tooling; Boeing partnership includes curriculum input, hands-on training, equipment support, and career pathways	Rapid preparation for aerospace manufacturing roles at Paine Field and a direct bridge between community college training and regional employers
SpaceX Intern / Graduate Engineer Program	Paid internship and graduate engineer opportunities offered in spring, summer, and fall; Redmond and Woodinville are listed among participating SpaceX locations	Provides an early career engineering pathway into a major regional satellite employer and exposes students to hands-on aerospace development and production environments
Joint Center for Aerospace Technology Innovation (JCATI)	State funded university-industry R&D partnerships focused on TRL 4-7 technology challenges; 199 projects with 93 aerospace companies	Links companies with Washington public-university engineering expertise while giving students hands-on experience on industry-defined problems

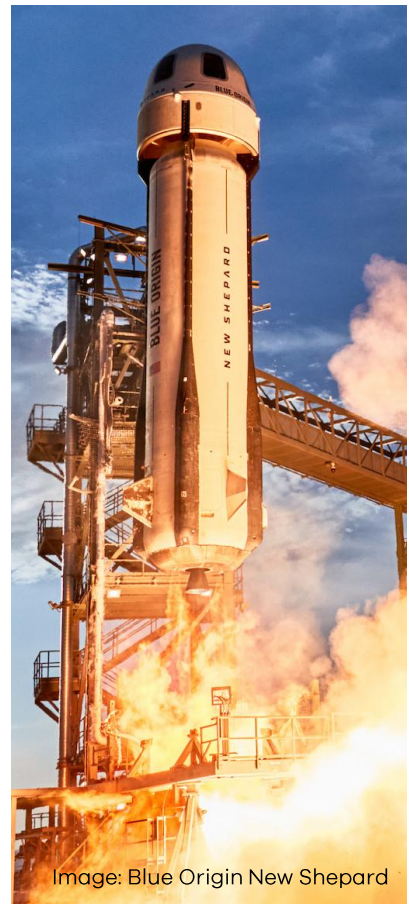
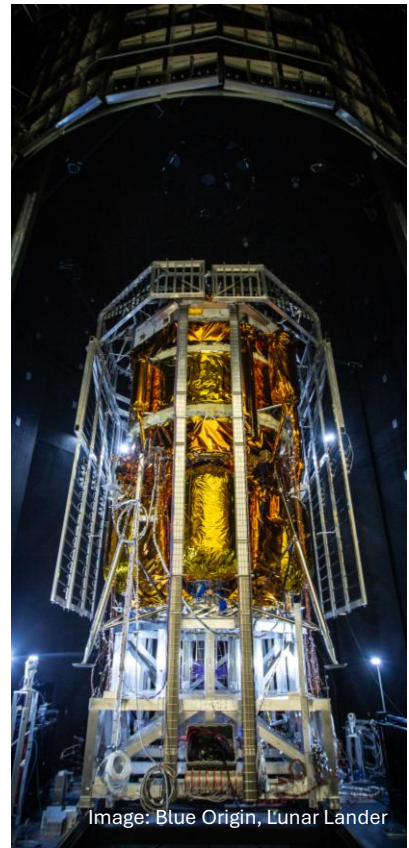
Sources: University of Washington; Washington NASA Space Grant Consortium; The Museum of Flight; Lake Washington Institute of Technology; Amazon; Everett Community College; AJAC; Core Plus Aerospace; Boeing; Edmonds College WATR Center; SpaceX; Joint Center for Aerospace Technology Innovation (JCATI). See Appendix B for source details

Employer participation is a particularly important part of the regional pipeline. Boeing supports workforce development at multiple stages: it works with the Office of Superintendent of Public Instruction on Core Plus Aerospace teacher training, hosts the program's summer Student Development Program, and created the Boeing Pre-Employment Training Program to accelerate hiring from pre-certified manufacturing programs. More than 1,500 Core Plus Aerospace graduates have been hired at Boeing since 2015, and more than 250 people were hired through BPET in 2025. Boeing also maintains a long-running partnership with Edmonds College focused on hands-on training, curriculum design, equipment support, and pathways into aerospace manufacturing careers (Core Plus Aerospace, 2025; Boeing, 2026a).

JCATI provides another bridge between Washington's public universities and the aerospace and space industry. The state-funded program pairs aerospace companies with engineering faculty to address Technology Readiness Level (TRL) 4-7 challenges, with project funding primarily supporting engineering students working on industry-defined problems. JCATI supported research spans areas directly relevant to the space sector, including space systems, propulsion and power systems, aerospace materials and composites, advanced manufacturing, AI and software, communications, controls and automation, and aerospace cybersecurity. Since 2012, JCATI has provided more than \$18 million in funding for 199 projects involving 93 aerospace companies, including regional space employers such as Blue Origin, Kymeta, Starfish Space, and Juno Propulsion. The model supports both technology transfer and workforce development by giving students applied R&D experience and direct exposure to industry employers (JCATI, 2026).

A 2026 national review by the Progressive Policy Institute highlighted Washington as particularly strong in aerospace workforce development, citing its K-12 programming, community college training, apprenticeships, and university-industry partnerships. The review also singled out JCATI's model of funding student work on industry-defined mid-stage technology problems as a distinctive way to connect workforce development with commercialization (Progressive Policy Institute, 2026; JCATI, 2026).

Space employers are also creating more direct pathways. Amazon Leo partnered with Lake Washington Institute of Technology in Kirkland to develop a specialized six-month satellite technician certification covering aerospace assembly, electronics manufacturing, fiber optics, avionics wiring, and



related production skills. The program is open to the public and to eligible Amazon hourly employees through Career Choice, creating a direct bridge into satellite manufacturing as Amazon scales its Kirkland production operation (Amazon, 2026). SpaceX separately lists Redmond and Woodinville among locations participating in its year-round internship and graduate engineer program, providing another employer-based entry point into the regional space workforce (SpaceX, 2026).

Greater Seattle’s education and training ecosystem is a meaningful competitive asset because it spans the full talent pipeline, from early STEM exposure and technical education to university research, apprenticeships, and employer-specific training. Just as important, many of these programs are directly connected to regional aerospace and space employers, helping align training with real workforce demand. The emergence of more space-specific pathways, including satellite technician training and industry-university R&D through JCATI, shows that the regional pipeline is becoming more specialized. The key challenge will be scale: as space companies expand, the region will need to increase the number of technicians, engineers, manufacturing workers, and other specialized talent moving through these pathways quickly enough to keep pace with employer growth.

6

Startups, Capital & Federal Funding

Startup activity adds a forward-looking lens to the region's established aerospace base. The analysis of aerospace startups founded between 2016 and 2026 identifies 25 Greater Seattle aerospace companies, of which 16 are primarily space-focused. Space therefore represents 64% of the region's aerospace startup cohort, while aviation, drones, and other aerospace segments represent 36%.

Classification of Aerospace Startups	Number of Startups	Share of Aerospace Startups	Share of aerospace Venture Capital Funding
Space-focused	16	64%	93.5%
Aviation / drones / other aerospace	9	36%	6.5%
Total	25	100%	100%

Large funding rounds for companies such as Stoke Space, Starcloud, Gravitics, and Portal Space Systems coexist with a broader pipeline of younger companies, suggesting the region has both established growth-stage ventures and continued startup formation. The funding landscape also reflects the breadth of Greater Seattle's space economy. Investment is distributed across multiple segments of the commercial space value chain rather than a single technology niche, including launch, spacecraft, propulsion, satellites, communications, remote sensing, orbital servicing, and space-based computing. This diversity may strengthen the region's resilience as commercial space markets continue to evolve.

The space startups below account for approximately \$3.48 billion in recorded funding, highlighting the scale of private capital supporting the region's emerging commercial space sector. Funding totals should be read as disclosed or database-recorded capital rather than audited company totals.

Company	Founded	Last Funding Round	Last Funding Date	Last Funding Amount	Total Funding	Company Focus
New Frontier Aerospace	2020	Grant	Jan. 17, 2025	\$3.0M	\$9.1M	Develops advanced rocket propulsion for orbital transfer spacecraft and hypersonic vehicles.
Orbite	2019	Series A	Dec. 5, 2024	\$4.0M	\$6.7M	Space training company focused on commercial space travel and hospitality.
Portal Space Systems	2021	Series A	Apr. 9, 2026	\$50.0M	\$70.5M	Developing spacecraft propulsion and mobility technologies for rapid space maneuverability
Radian	2016	Seed	Jan. 19, 2022	\$27.5M	\$27.7M	Developing a fully reusable orbital aerospace vehicle.
Rocket Propulsion Systems	2019	Grant	Jul. 1, 2025	\$3.0M	\$5.2M	Designs orbital transfer vehicles and suborbital rockets.
Starcloud	2024	Series A	Aug. 21, 2026	\$250.0M	\$450.0M	Develops space-based data center infrastructure.
Starfish Space	2019	Series B	Apr. 7, 2026	\$111.7M	\$174.6M	Develops autonomous spacecraft for in-orbit satellite servicing.
Stoke Space	2019	Series E	Sep. 8, 2026	\$1.0B	\$2.30B	Develops fully reusable Nova rockets for orbital space mobility.
Xplore	2017	Venture - Series Unknown	Feb. 24, 2022	\$16.2M	\$25.2M	Develops satellites and space-based imagery, hyperspectral data, and on-orbit computing.

Source: Crunchbase Startup Report, September 2026, with selected 2026 company and investor announcements used as cross-checks. Funding methodologies differ across sources; contract awards, public-private cost shares, and undisclosed financing are not uniformly captured. For example, Gravitics has a separate up-to-\$60 million STRATFI effort that combines government and private funds and is not treated here as a conventional venture round.

Benchmark startup activity since 2016

MSA	Total Aerospace Startups	Space Startups	Space Share	Total Aerospace Funding	Space Startup Funding	Space Share of Funding
Seattle	25	16	64.0%	\$3.72B	\$3.48B	93.5%
Houston	11	7	63.6%	\$1.63B	\$1.42B	87.3%
Denver	33	19	57.6%	\$5.13B	\$4.81B	93.7%
Denver	104	40	38.5%	\$29.13B	\$8.15B	28.0%
San Francisco	11	4	36.4%	\$492.9M	\$56.5M	11.5%
Orlando	34	11	32.4%	\$2.48B	\$460.7M	18.5%
Washington, DC	147	41	27.9%	\$9.12B	\$3.02B	33.1%
Austin	18	2	11.1%	\$1.93B	\$696.3M	36.0%
Phoenix	5	2	40.0%	\$152.5M	\$135.1M	88.6%

Greater Seattle's aerospace startup ecosystem is unusually concentrated in commercial space. Of the 25 aerospace startups founded since 2016 identified in the dataset, 16, or 64%, are space-focused. These companies account for approximately \$3.48 billion in recorded funding, or about 93.5% of all funding in the region's aerospace startup cohort. Following major 2026 financings, Greater Seattle has the third largest recorded space startup funding total among the benchmark metros. Greater Denver, Greater Seattle's closest overall competitor for advanced space activity, has attracted approximately \$4.81 billion in recorded space startup funding compared with Greater Seattle's \$3.48 billion, and the dataset identifies 19 Greater Denver space startups compared with 16 in Greater Seattle. The comparison shows both the strength of Greater Seattle's space specialization and the competitive pressure to continue attracting capital, companies, and expansion.

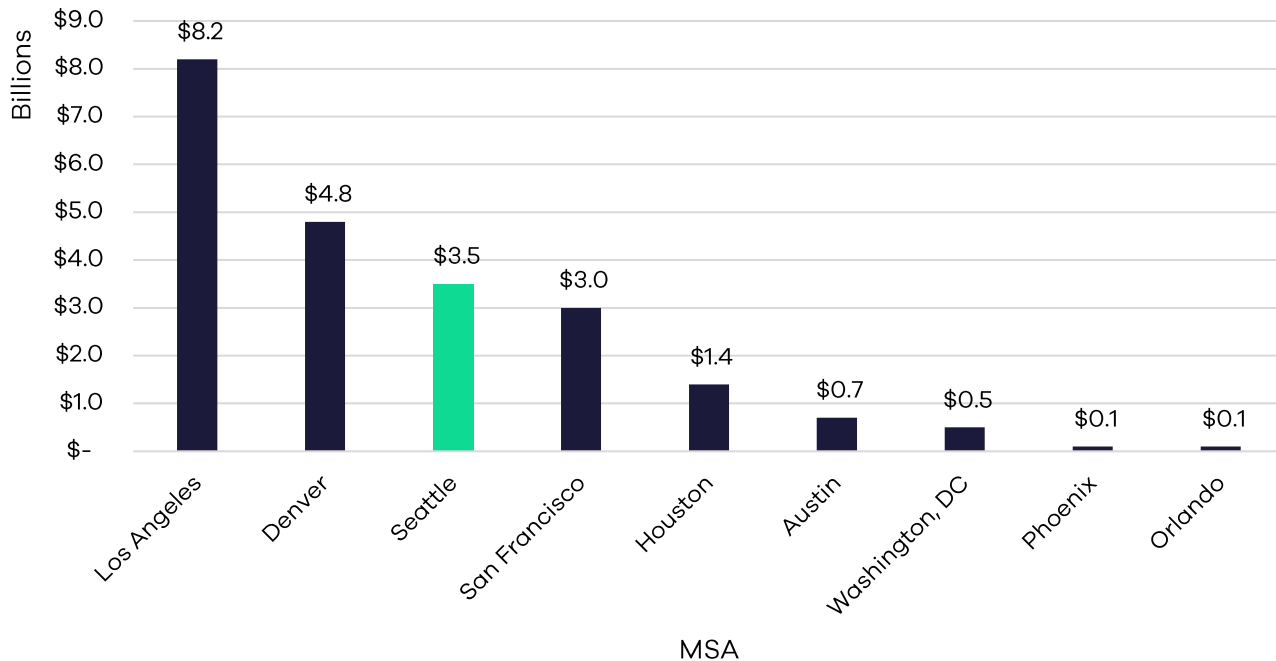


Image: Stoke Space S2



Image: Stoke Space Cape Canaveral Launch Site

Space Startup Funding Across Benchmark MSAs



There is also an important distinction between scale and specialization. LA and San Francisco produce many more aerospace startups overall, but their startup ecosystems are much more diversified across defense, aviation, drones, manufacturing, eVTOL and other technologies. Seattle and Denver stand out as places where aerospace entrepreneurship itself is disproportionately becoming space entrepreneurship.

Venture Capital and Private Investment

The largest space-sector financing announced in Greater Seattle in 2026 came on September 8, when Kent-based Stoke Space announced a \$1 billion Series E financing, bringing total capital raised to \$2.3 billion. The financing will support the company's first orbital launch, expansion of production and launch capacity, and development of the larger Nova Block 2 launch vehicle (Stoke Space, 2026). The scale of the round positions Stoke among the region's most heavily capitalized private space companies and reinforces Greater Seattle's role in the commercial launch and propulsion market.

Greater Seattle's spacecraft-servicing sector has also attracted significant capital. Starfish Space announced more than \$100 million in Series B funding in April 2026 to expand its satellite-servicing business. The financing followed growing commercial and government demand for the company's autonomous Otter servicing vehicle (Starfish Space, 2026a).

Marysville-based Gravitics raised a \$17 million seed round in September 2026, bringing its recorded total funding to \$37 million (Crunchbase, 2026). Gravitics develops space infrastructure and is also expanding its national-security space activity through its Orbital Carrier program.

Seattle-based satellite connectivity company Hubble Network recorded a \$200 million Series C financing on September 23, 2026, bringing total recorded funding to approximately \$290.5 million. The financing followed a \$30 million investment from Seraphim Space Investment Trust in August. Hubble is developing a satellite-powered Bluetooth network designed to connect standard Bluetooth-enabled

devices directly to satellites without conventional terrestrial network infrastructure (Crunchbase, 2026; Seraphim Space Investment Trust, 2026).

Seattle-based Integrate, which develops secure project-management software for defense and classified programs, raised a \$17 million Series A in February 2026. The company plans to use the financing to expand its platform and government market strategy, building on work with the U.S. Space Force (Integrate, 2026). Integrate illustrates a different component of Greater Seattle’s space economy: software infrastructure that supports increasingly complex commercial and national-security space programs.

Orbital computing has emerged as another active investment category. Sophia Space, a California-based space computing company with Seattle operations, announced a \$10 million seed financing in February and an additional \$7 million financing in June, bringing total reported funding to \$22 million (Sophia Space, 2026a, 2026b). Combined with the growth of Starcloud and the arrival of Cowboy Space, this activity suggests that space-based computing and AI infrastructure are becoming an increasingly visible area of specialization connected to Greater Seattle’s broader cloud and technology economy.

Federal Contracts and Strategic Public Funding

Publicly announced 2026 awards identify at least \$143.9 million in federal contract value awarded directly to Greater Seattle-based space companies. This includes \$107.0 million in U.S. Space Force and Space Development Agency awards to Starfish Space, a \$30.0 million U.S. Space Force STRATFI contract to Gravitics, and a \$6.9 million NASA SBIR Phase III contract to Interlune. The figure is a conservative identified award baseline rather than a comprehensive measure of all federal spending in the regional space economy (Starfish Space, 2026b, 2026c; U.S. Securities and Exchange Commission, 2026; NASA, 2026a).

Regional company	Federal customer / program	Identified federal value
Starfish Space	Space Development Agency / U.S. Space Force	\$52.5M
Starfish Space	U.S. Space Force / APFIT	\$54.5M
Gravitics	U.S. Space Force / SpaceWERX STRATFI	\$30.0M
Interlune	NASA SBIR Phase III	\$6.9M
Identified 2026 regional baseline		\$143.9M

Sources: Starfish Space (2026b, 2026c); U.S. Securities and Exchange Commission filing for Gravitics (2026); NASA (2026a). Values are announced/current contract values or ceilings and should not be interpreted as obligations or expenditures. See Appendix B.

Starfish Space accounts for \$107.0 million of the identified 2026 baseline. In January, the Space Development Agency awarded the company a \$52.5 million contract for end-of-life satellite disposal services. In February, Starfish received a separate \$54.5 million U.S. Space Force contract for a dedicated Otter satellite servicing vehicle (Starfish Space, 2026b, 2026c).

Seattle-area Gravitics also expanded its national security space activity in 2026. In March, the company entered into a \$30.0 million firm-fixed-price STRATFI contract with the U.S. Space Force for its Orbital Carrier program. The broader STRATFI effort represents up to \$60 million when Gravitics' required \$30 million commercial match is included (U.S. Securities and Exchange Commission, 2026; Gravitics, 2026). The federal contract supports design, development, integration, and flight demonstration of the Orbital Carrier and related systems, positioning the company within an emerging market for responsive orbital logistics and pre-positioned spacecraft infrastructure.

Seattle-based Interlune received a \$6.9 million NASA SBIR Phase III contract in May 2026 to develop technologies for measuring volatile gases in lunar soil and demonstrating resource extraction capabilities. The effort includes technologies relevant to extracting helium-3 and hydrogen and expands Greater Seattle's presence into the emerging lunar resource economy (NASA, 2026a).

Kent-headquartered Blue Origin received one of the year's largest federal space awards when NASA selected the company in September 2026 to develop the agency's Mars Telecommunications Network. The firm-fixed-price contract has a maximum potential value of approximately \$700 million and calls for a high-performance telecommunications spacecraft to support Mars missions (NASA, 2026b). Because work on the program may occur across Blue Origin's national footprint, the full contract value is not included in the Greater Seattle baseline and should not be interpreted as direct regional economic activity.

Federal demand also predates the 2026 awards. In 2024, Starfish Space received a \$37.5 million Space Force STRATFI contract and a \$15 million NASA SBIR Phase III contract. Together, those awards bring the identified federal award total since 2024 to at least \$196.4 million. This remains a conservative floor rather than a comprehensive accounting (Starfish Space, 2024; NASA, 2024).

7

Infrastructure and Supply Chain

Greater Seattle's space infrastructure is centered on manufacturing, engineering, integration, testing, computing, and logistics. Activity is distributed across established aerospace and technology corridors throughout the region, giving companies access to specialized labor, aerospace suppliers, airports, highways, maritime freight, and the broader technology ecosystem.

Manufacturing and Industrial Capacity

The region's long aerospace history has created capabilities in precision machining, electronics, composites, tooling, engineering services, quality systems, testing, and advanced manufacturing that are directly relevant to commercial space. Increasingly, these capabilities are supporting satellite production, spacecraft development, propulsion, and other space related manufacturing.

Recent company expansions also demonstrate demand for physical production capacity across the region. Space companies are establishing and expanding engineering and manufacturing operations in communities including Kent, Bothell, Woodinville, Redmond, and the broader Eastside. As companies move from prototype development toward higher volume production, access to suitable

industrial space, power, specialized facilities, and nearby suppliers will become increasingly important.

Aerospace Supply Chain as a Space Asset

Greater Seattle's established aerospace supply chain provides commercial space companies with access to firms experienced in demanding production standards, traceability, reliability, and complex aerospace manufacturing. However, aerospace capability does not automatically translate into space sector readiness. Some suppliers may need to adapt equipment, certifications, production processes, or customer relationships to serve faster moving commercial space programs. Helping qualified regional suppliers make that transition represents both a supply chain opportunity and a way to retain more space sector spending within the region.

Logistics and Launch Dependency

Greater Seattle does not have a major orbital launch complex, meaning spacecraft and other hardware generally must be transported to launch sites outside the region. This creates an additional logistics requirement relative to launch-centered markets, but it does not prevent the region from competing in satellites, spacecraft, propulsion engineering, software, computing, and advanced manufacturing. For Greater Seattle, the more relevant infrastructure question is whether companies can design, manufacture, test, integrate, and efficiently transport space hardware at scale.

Industrial Scaling Priorities

- Availability and cost of industrial space near major aerospace and logistics corridors
- Access to specialized test, cleanroom, and integration capacity
- Power and data infrastructure for compute-intensive or advanced manufacturing uses
- Permitting and regulatory complexity
- Ability of regional suppliers to scale with commercial space production

8 Competitive Benchmarking

Space hubs specialize in different functions. A meaningful comparison therefore requires more than ranking total employment. The benchmark set is best interpreted as a series of distinct competitive models.

Benchmark MSA Profiles			
MSA	Significance	Primary Space Industry Specializations	Representative Companies & Institutions
Seattle-Tacoma-Bellevue, WA (Benchmark Region)	Large, diversified commercial space and aerospace ecosystem	Satellite broadband, cloud computing, AI, advanced manufacturing, commercial spacecraft, aerospace engineering	Amazon Leo, Blue Origin, SpaceX/Starlink, Stoke Space, Portal Space Systems, Starfish Space, Boeing, Microsoft, AWS, Firefly/Spaceflight operations

Benchmark MSA Profiles			
MSA	Significance	Primary Space Industry Specializations	Representative Companies & Institutions
Denver–Aurora–Centennial, CO	Seattle's closest overall competitor for commercial and defense space	Satellite manufacturing, Earth observation, national security space, spacecraft systems, aerospace software	Lockheed Martin Space, BAE Systems (formerly Ball Aerospace), Sierra Space, Maxar, York Space Systems, Blue Canyon Technologies
Los Angeles–Long Beach–Anaheim, CA	Largest U.S. aerospace and commercial space cluster	Launch vehicles, spacecraft manufacturing, propulsion, defense space systems	SpaceX, Rocket Lab, Relativity Space, Vast, Millennium Space Systems, Boeing, Northrop Grumman
Houston–Pasadena–The Woodlands, TX	Global center for human spaceflight	Human spaceflight, commercial space stations, astronaut training, lunar missions	NASA Johnson Space Center, Axiom Space, Intuitive Machines, Collins Aerospace
Washington, DC–Arlington–Alexandria (Northern Virginia)	Center of federal space procurement and policy	Government contracting, intelligence, satellite operations, cybersecurity, policy	NASA Headquarters, U.S. Space Force acquisition offices, SAIC, Leidos, CACI, General Dynamics, Boeing Government Services
Orlando–Kissimmee–Sanford, FL / Florida Space Coast	America's primary launch hub	Launch operations, launch infrastructure, launch vehicle manufacturing, testing	NASA Kennedy Space Center, SpaceX, Blue Origin, United Launch Alliance (ULA), Boeing, Lockheed Martin
Austin–Round Rock–San Marcos, TX	Rapidly growing commercial space startup ecosystem	Space software, advanced manufacturing, venture-backed startups, aerospace electronics	Firefly Aerospace, CesiumAstro, ICON, numerous venture-backed startups
San Francisco–Oakland–Fremont, CA (Bay Area)	Leading venture capital and NewSpace innovation hub	Space startups, AI, satellite services, deep tech investment, orbital software	Planet Labs, Astranis, Loft Orbital, Momentus, numerous venture-backed startups
Phoenix–Mesa–Chandler, AZ	Major aerospace manufacturing and semiconductor hub	Advanced manufacturing, propulsion, avionics, defense electronics, semiconductor-enabled space hardware	Honeywell Aerospace, Boeing, Raytheon, Northrop Grumman, Intel, TSMC

Note: Orlando is the benchmark MSA; Cape Canaveral/Kennedy Space Center are in adjacent Brevard County (Palm Bay–Melbourne–Titusville MSA). Source: Greater Seattle Partners analysis of company materials, federal and regional sources, and the 2026 Lightcast benchmark framework. Representative organizations are illustrative, not exhaustive.

Competitive model	Representative regions	Primary focus
Commercial space manufacturing	Seattle, Los Angeles, Denver, Phoenix	Satellites, spacecraft, launch vehicles, advanced manufacturing
Launch and mission operations	Orlando / Florida Space Coast	Launch infrastructure, propulsion, mission testing
National security space	Washington, DC, Denver	Defense, intelligence, Space Force, secure satellite systems
Human spaceflight and exploration	Houston	NASA, astronaut training, lunar missions, commercial stations
Software, deep tech, and venture ecosystems	Seattle, Austin, San Francisco	AI, cloud computing, autonomy, mission software, startups

Peer region implications

Los Angeles

The broadest manufacturing and commercial space competitor, with unmatched scale across launch vehicles, spacecraft, propulsion, and defense. Seattle competes less on total breadth and more on the combination of aerospace with cloud/software and commercial satellite activity.

Denver

Denver is Greater Seattle's closest overall competitor for advanced commercial and national security space activity. It combines a deep aerospace workforce, spacecraft manufacturing, national security demand, aerospace software, and a mature supplier ecosystem.

Houston

A global human-spaceflight center anchored by NASA and commercial stations. Its model is institutionally different from Seattle's commercial manufacturing-and-technology proposition.

Washington, DC

Dominant in federal procurement, intelligence, policy, cybersecurity, and government contracting rather than manufacturing. This highlights Seattle's relative weakness in federal institutional presence.

Orlando / Florida Space Coast

A launch-operations model built around launch infrastructure, NASA Kennedy Space Center, and range operations. Seattle cannot replicate this geography and should not compete on the same basis.

San Francisco and Austin

Important comparison markets for venture capital, deep tech, AI, software, and startups. Seattle's differentiator is that it combines many of those technology assets with a much deeper established aerospace base.

Aerospace & Space Manufacturing Rankings Across Benchmark MSAs

Among the nine benchmark MSAs, the Seattle MSA ranks #1 in both 2026 employment and location quotient for Aircraft Manufacturing (NAICS 336411), #3 in employment and #4 in location quotient for Guided Missile and Space Vehicle Manufacturing (NAICS 336414), and #3 in both employment and location quotient for Guided Missile and Space Vehicle Propulsion Unit and Propulsion Unit Parts Manufacturing (NAICS 336415).

NAICS 336411 Aircraft Manufacturing		
MSA	LQ	2026 Jobs
Seattle	18.2	63,997
Los Angeles	2.291	24,258
Phoenix	1.245	4,978
Austin	0.589	1,308
Denver	0.372	1,006
San Francisco	0.214	856
Washington, DC	0.097	521
Orlando	0.07	166
Houston	0.026	148

NAICS 336414 Guided Missile and Space Vehicle Manufacturing		
MSA	LQ	2026 Jobs
Orlando	7.18	5,441
Denver	6.59	5,716
Los Angeles	5.91	20,053
Seattle	4.84	5,456
Phoenix	1.09	1,392
Houston	0.36	651
Washington, DC	0.1	177
San Francisco	0.06	74
Austin	0.03	22

NAICS 336415 Guided Missile and Space Vehicle Propulsion Unit and Propulsion Unit Parts Manufacturing

MSA	LQ	2026 Jobs
Orlando	7.8	1,487
Denver	1.59	348
Seattle	1.43	5,456
Los Angeles	1.2	1,392
Phoenix	0.3	651
Washington, DC	0.14	177
San Francisco	0.003	74
Austin	0	22
Houston	0	

Source: Lightcast Industry Table, Q3 2026 dataset, MSA geography. Rankings compare the nine primary benchmark metros used in this report.

Federal Space and Defense Awards Across Benchmark Markets

USAspending records show that federal space and defense activity is substantial across several benchmark markets, but the structure of that activity differs. The examples below use obligated dollars on selected awards with a clear space or space-adjacent federal mission and a reported connection to the benchmark market. They are intentionally not summed as comprehensive metro totals: a single national award can span multiple locations, and there is no single federal procurement code that captures the entire space economy.

MSA	Selected USAspending award / project	Federal customer	Obligated amount
Seattle	Blue Origin Washington - landing-lidar technology maturation (80NSSC24K1200)	NASA	\$1.0M
Denver	Lockheed Martin - Lucy spacecraft and mission operations (NNG17FD73C)	NASA	\$350.8M
Los Angeles	SpaceX - CMSI #1 space transportation / launch (FA881124FB011)	U.S. Air Force / DoD	\$60.0M
Houston	Intuitive Machines - CLPS RF mass-gauge integration and cryogenic data delivery (80JSC020F0285)	NASA	\$4.0M
Washington, DC	CACI - NASA Consolidated Application and Platform Services, performed in Chantilly (80TECH24CA002)	NASA	\$270.6M

MSA	Selected USAspending award / project	Federal customer	Obligated amount
Orlando	Boeing - Commercial Crew Transportation Capability, place of performance Orlando (NNK15MA50T)	NASA	\$360.6M
San Francisco	Lanternis Space - spacecraft bus / RESTORE-OSAM-1 work, Palo Alto (NNG17FB00C)	NASA	\$139.1M
Austin	Firefly Aerospace - Commercial Lunar Payload Services, CP-21 (80JSC025F7026)	NASA	\$108.2M
Phoenix	Iridium Satellite LLC - Gateway Location Server under SITH (FA254125FB021)	U.S. Air Force / DoD	\$1.6M

Sources: USAspending.gov award records and current federal contract reporting, re-verified September 24, 2026. Amounts are total obligated amounts shown for the selected award, not annualized metro totals. Award examples were selected for clear space relevance and benchmark-market connection. Obligated values are point-in-time and may change as awards are modified. A comprehensive annual comparison would require a repeatable USAspending bulk extract using consistent place-of-performance, PSC/NAICS, agency, and date filters.

Greater Seattle is winning meaningful federal work, but peer markets such as Denver, Washington, DC, Orlando, and Houston are embedded in larger or more institutionally proximate federal space networks. The strategic opportunity is therefore to expand Greater Seattle's share of federal space activity while improving the region's ability to measure that share consistently over time.

This institutional gap has also been identified in national space policy analysis. The Progressive Policy Institute described Washington as one of the few major U.S. space states without a major federal space facility, reinforcing the distinction between the region's demonstrated ability to win federal work and its comparatively limited proximity to federal space institutions (Progressive Policy Institute, 2026).



Image: Blue Origin, New Glenn

Greater Seattle competitive position

Dimension	Interpretation and Assessment
Workforce scale	#2 of benchmark metros; only Los Angeles has a larger aerospace workforce
Specialization	Aerospace employment far exceeds size-adjusted national expectation
Earnings per job	Highest in benchmark group; reflects high value, high compensation industry and occupational mix
Broad aerospace growth	Broad 36-industry base; space momentum is better reflected in startup investment and expansion activity
Strategic fit	High-value manufacturing, engineering, commercial space, software and cloud
Startup specialization	64% of Greater Seattle aerospace startups in the dataset are space-focused. Ranked 3rd in benchmark set for space startup funding
Launch access	No local orbital launch site; hardware depends on out-of-region launch infrastructure
Federal market connectivity	At least \$143.9M in identified 2026 federal award value; gap is institutional proximity and connectivity, not absence of federal demand
Technician pipeline	Scaling needs to be a priority. Strong education and apprenticeship assets exist, but throughput must keep pace with employer growth
Business costs / incentives	Business costs and incentives can be a competitive challenge. Stakeholder interviewees identified costs, taxes, and incentive competition as factors in expansion decisions

Source: Greater Seattle Partners synthesis of Lightcast Q3 2026 benchmark data, startup analysis, regional research, and 2026 stakeholder interviews. Assessments are comparative and qualitative unless a specific rank is shown.

What Differentiates Greater Seattle

The evidence supports five interlocking competitive advantages. None is unique in isolation; the regional advantage comes from their co-location and interaction within a single regional ecosystem.

Competitive Advantage	Why it Matters
Aerospace Manufacturing Depth	Greater Seattle has one of the nation's deepest commercial aerospace ecosystems, providing production know-how, quality systems, technical labor, and supplier capabilities relevant to commercial space manufacturing.

Competitive Advantage	Why it Matters
Concentrated Satellite Production	Amazon Leo and SpaceX/Starlink activity reinforce regional depth in satellite production, RF systems, electronics, automation, operations, and specialized talent.
Cloud, Software, and AI Capability	Greater Seattle combines a major aerospace base with significant capabilities in cloud computing, software, AI, cybersecurity, and digital engineering, increasingly important to modern spacecraft and mission systems.
Diversified Emerging-Space Portfolio	Companies including Stoke Space, Starfish Space, Portal Space Systems, Starcloud, Hubble Network, and Kapta Space broaden the regional ecosystem across orbital mobility, servicing, computing, sensing, communications, and other emerging applications.
Mature Supplier and Technical-Services Ecosystem	Decades of aerospace activity have created regional depth in materials, electronics, machining, engineering, testing, design, and other specialized services that can support space companies as they scale.

9

Growth Opportunities and Competitive Risks

Greater Seattle has substantial opportunities to capture additional commercial space growth, but realizing them will require deliberate action. The strongest opportunities build on capabilities already concentrated in the region while extending them into faster-growing segments such as orbital mobility, servicing, space computing, autonomous systems, and commercial satellite infrastructure. The areas below reflect alignment between existing regional assets and emerging industry demand rather than forecasts of guaranteed growth.

Sizing the Stakes and the Prize

Greater Seattle is competing within a global space economy expected to expand substantially over the next decade. The World Economic Forum and McKinsey & Company project the global space economy to grow from \$630 billion in 2023 to approximately \$1.8 trillion by 2035, an average annual growth rate of about 9%. Their more directly space-industry-focused "backbone" segment, including satellites, launchers, ground equipment, and direct space services, is projected to grow about 7% annually, compared with roughly 5% for global nominal GDP (World Economic Forum & McKinsey & Company, 2024). Using a different measurement framework, Space Foundation estimated the global space economy at \$613 billion in 2024, up 7.8% year over year, and projects that it could exceed \$1 trillion as early as 2032 (Space Foundation, 2025).

Recent estimates also show a more conservative but still substantial growth path. Novaspace estimated the global space economy at \$626.4 billion in 2025 and projects it to reach \$1.01 trillion by 2034, a 5.5% compound annual growth rate (Novaspace, 2026). These market estimates should not be read as a single time series because the organizations use different definitions and methodologies. For national context, the U.S. Bureau of Economic Analysis estimates that the U.S. space economy generated \$240.9 billion in gross output and \$142.5 billion in GDP in 2023 while supporting 373,000 private-sector jobs (U.S. Bureau of Economic Analysis, 2025). The BEA national accounts and the

Space Northwest/BERK regional impact estimate also use different methodologies, so the national figures are presented as context rather than as a basis for calculating Greater Seattle's market share.

To translate that external growth context into a regional scale marker, the table below compounds Greater Seattle's \$8.1 billion 2026 economic impact baseline through 2035 under three nominal growth assumptions. The 5%, 7%, and 9% paths roughly bracket current external market outlooks, from Novaspace's 5.5% annual growth projection through 2034 to the World Economic Forum and McKinsey's 7% space-backbone and 9% broader-market trajectories. This is deliberately illustrative: the Space Northwest/BERK regional impact measure and the global market forecasts are not identical metrics, and this exercise is not a forecast of Greater Seattle's future output. It is intended to show the order of magnitude of the opportunity.

Illustrative scenario	Annual growth assumption	2035 activity from \$8.1B baseline
Broader-economy comparator	5%	\$16.0B
Space-backbone growth	7%	\$20.9B
Overall space-economy growth	9%	\$27.1B

Sources: Novaspace (2026); World Economic Forum & McKinsey & Company (2024) growth assumptions; Greater Seattle Partners calculation using the Space Northwest/BERK 2026 economic impact baseline. Illustrative only; not a forecast.

On this illustrative basis, the difference between the 5% broader-economy comparator and the 7%-9% space growth paths is approximately \$4.9 billion to \$11.1 billion in annual regional economic activity by 2035. This should not be interpreted as a forecasted loss if Greater Seattle grows more slowly. Rather, it provides a directional measure of the economic value at stake if the region does not capture its share of a faster-growing global space market.

Scale Established Strengths

- Satellite Manufacturing and Connectivity**
Large scale activity associated with Amazon Leo and SpaceX/Starlink reinforces Greater Seattle's depth in satellite production, electronics, RF systems, automation, and specialized workforce capabilities. The broader opportunity is to extend these benefits through the regional supplier base and workforce ecosystem.
- Supplier Conversion and Production Scaling**
Washington's established aerospace and advanced-manufacturing supply chain provides a potential pathway for more firms to participate in commercial space. Helping qualified suppliers adapt to space sector requirements could diversify customer bases while expanding regional production capacity.

Capture Emerging Space Markets

- Orbital Mobility, Servicing, and Responsive Spacecraft**
Companies including Starfish Space and Portal Space Systems point to an emerging regional

capability in rendezvous and proximity operations, servicing, maneuverable spacecraft, and responsive missions. These technologies have potential applications across both commercial and national security markets.

• **Orbital Computing and AI Infrastructure**

Orbital computing represents an emerging market in which Greater Seattle may have an unusually strong strategic fit. The sector requires both spacecraft production expertise and capabilities in cloud computing, AI, software, networking, data center infrastructure, and autonomous systems. Greater Seattle already possesses both sides of that equation.

Starcloud provides the clearest regional proof point. After relocating from El Segundo to Redmond in search of satellite mass production talent, the company has grown into a well-capitalized orbital-computing company and is establishing production lines at a 100,000-square-foot Woodinville manufacturing facility (Greater Seattle Partners interview, 2026; Boyle, 2026c). Sophia Space and Cowboy Space add further activity at the intersection of space systems, computing, and AI.

Leverage Technology Sector Advantages

• **Software-Defined and Autonomous Space Systems**

As spacecraft and distributed mission architectures become increasingly software-intensive and autonomous, Greater Seattle may be positioned to combine aerospace expertise with regional strengths in software engineering, cloud infrastructure, cybersecurity, machine learning, and digital engineering.

Selected State Tools Relevant to Space Sector Competitiveness

The benchmarking study spans seven state jurisdictions. The comparison below focuses on state-level tools that can influence large investment, expansion, commercialization, and workforce decisions. It is illustrative rather than exhaustive. The key distinction is not simply whether a state offers incentives, but whether its tools are flexible, sector-specific, and usable by commercial space companies as they scale.

State / MSA market(s)	Selected tools	Space sector relevance / comparison
Washington (Seattle)	Strategic Reserve Fund; aerospace tax credits/exemptions; WEDFA conduit financing.	Targeted project support and capital financing are available, but several aerospace tax preferences remain defined around commercial airplanes, components, tooling, and related product development. No dedicated commercial space grant institution was identified.
Colorado (Denver)	Job Growth Incentive Tax Credit; Strategic Fund; Advanced Industries Accelerator.	Combines performance-based relocation/expansion incentives with Advanced Industries grants that explicitly include aerospace, giving the state both deal-closing and commercialization tools.

State / MSA market(s)	Selected tools	Space sector relevance / comparison
California (Los Angeles, San Francisco)	California Competes Tax Credit; manufacturing/R&D equipment sales tax relief; advanced manufacturing support.	Uses broad competitive tax credits and equipment tax relief rather than a space-specific program, but the tools can support large advance - manufacturing expansions.
Texas (Houston, Austin)	Texas Enterprise Fund; JETI; Texas Space Commission and SEARF.	Combines deal-closing cash grants and major-project property-tax relief with a dedicated space institution and grant fund. The Texas Space Commission reported \$150 million awarded across 24 SEARF projects as of February 2026.
Florida (Orlando)	Space Florida financing and tax efficiencies; Spaceport Improvement Program.	Uses sector-specific financing and state-funded infrastructure rather than relocation checks. These tools can lower capital costs and expand shared space infrastructure.
Virginia (Washington, DC)	Commonwealth's Development Opportunity Fund; Virginia Jobs Investment Program; Defense Production Zones.	Pairs a discretionary deal-closing fund with customized workforce support and defense-oriented local incentives, complementing Northern Virginia's federal market proximity.
Arizona (Phoenix)	Refundable R&D and Qualified Facility credits; training support; FTZ/Military Reuse Zone benefits.	Packages facility, R&D, workforce, and property-tax tools specifically for aerospace and defense, creating operating cost advantages for eligible projects.

The comparison suggests that Washington's issue is not the absence of economic development tools, but the fit and visibility of those tools for commercial space. Washington has a discretionary Strategic Reserve Fund, WEDFA financing, and aerospace tax preferences, yet several major aerospace tax provisions remain defined around commercial airplanes, components, tooling, and related product development. Peer states use different models: Texas has a dedicated Space Commission and space grant fund; Florida pairs sector-specific financing with state funded spaceport infrastructure; Colorado explicitly includes aerospace in its Advanced Industries grants; and Arizona packages refundable facility and R&D credits with workforce and property tax tools. California and Virginia rely more heavily on broad competitive project and workforce incentives. The practical question for Washington is therefore whether its existing toolkit is sufficiently flexible, visible, and space relevant to compete for the next generation of commercial space expansions.

The type of support may matter as much as its total value. The Progressive Policy Institute's national review finds that mature companies are more likely to benefit from tax incentives, while early-stage

NewSpace companies often rely more on grants, incubators, and accelerator programs. It also notes that general economic development programs can be harder for space companies to find or access when they are not explicitly targeted to the sector (Progressive Policy Institute, 2026). This distinction is especially relevant to Greater Seattle, where 64% of the identified aerospace startups founded since 2016 are space focused.

Competitive Pressures and Risks to Continued Growth

Greater Seattle enters the next phase of commercial space growth from a position of considerable strength. Competing space hubs are investing in workforce, industrial capacity, incentives, federal market relationships, and specialized infrastructure. Greater Seattle's ability to retain and expand its current advantage will depend on whether the region can address constraints as companies scale.

Competitive consideration	Why it matters
Specialized workforce capacity	As multiple companies scale, competition for specialized engineering, technical, manufacturing, electronics, quality, and test talent could create hiring bottlenecks.
Business costs and incentive competition	Some interview participants raised concerns about operating costs and Washington's broader business environment. At the same time, competing states may use tax incentives, financing programs, or dedicated aerospace initiatives more aggressively to influence expansion decisions.
Industrial scaling capacity	Large-scale spacecraft and satellite production can require specialized facilities, power, testing infrastructure, logistics access, and supplier capacity. Availability of suitable industrial space near established aerospace corridors may therefore influence company expansion decisions.
Federal market connectivity	Greater Seattle companies are already securing meaningful NASA, Space Force, and other federal space awards, including at least \$143.9 million in identified 2026 contract value among locally based firms. The competitive gap is therefore not an absence of federal demand, but comparatively limited proximity to federal acquisition institutions, program offices, and customer networks concentrated in several peer markets.
Dependence on out-of-region launch infrastructure	Washington does not offer the orbital launch infrastructure or trajectory advantages of major U.S. launch markets. Spacecraft and other hardware produced in the region generally must be transported to launch sites elsewhere, creating an additional logistics requirement.
Relative growth-rate positioning	Greater Seattle's projected aerospace employment growth may appear more moderate on a percentage basis than growth in some smaller peer markets. The region's competitive case therefore rests more heavily on the scale, specialization, productivity, and depth of its existing industry base than on headline growth rates alone.

Business Attraction and Physical Expansion

One of the region’s clearest recent business attraction wins is Cowboy Space, a California-based company developing vertically integrated rockets and orbital AI data centers. In May 2026, the company announced a \$275 million Series B financing at a \$2 billion valuation while establishing a satellite and rocket engineering center in the Seattle area, with plans at the time to hire approximately 40 to 60 employees (Schlosser, 2026). In September, Cowboy Space leased a 291,035-square-foot industrial facility in Kent for aerospace and advanced manufacturing operations. Newmark identified the transaction as the largest industrial lease in the Puget Sound region year-to-date and estimated that the facility could add approximately 300 aerospace jobs to the region (Newmark, 2026).

K2 Space, a California-based manufacturer of large, high-power satellites, also selected Greater Seattle for expansion in 2026. The company announced a new Seattle-area engineering operation in July focused on flight software, autonomy, and low-level satellite systems. K2 cited the region’s aerospace and engineering talent as a reason for choosing the market (Boyle, 2026a). Later that month, the company announced a \$500 million Series D financing at a \$6.8 billion valuation, bringing total capital raised above \$1 billion (Boyle, 2026b). The combination of a new engineering operation and significant growth capital provides a direct example of a high-growth space company selecting Greater Seattle for specialized technical talent.

Expansion is also occurring among companies already rooted in the region. Redmond-based Starcloud raised a \$250 million Series A extension in August 2026, bringing its total funding to approximately \$450 million and valuing the company at \$2.3 billion. The company is establishing production lines for its orbital data center spacecraft at a new 100,000-square-foot manufacturing facility in Woodinville (Boyle, 2026c). The expansion represents a significant new advanced-manufacturing investment at the intersection of aerospace, artificial intelligence, and data center infrastructure.



Image: Amazon Leo hardware testing

Bothell-based Portal Space Systems raised a \$50 million Series A in April 2026 to advance its rapidly maneuverable spacecraft platform (Portal Space Systems, 2026). Portal's financing builds on physical expansion already underway in Bothell, including a second approximately 50,000-square-foot production facility and a \$350,000 Washington State Strategic Reserve Fund award announced in December 2025 to support the company's manufacturing growth. State estimates associated with that expansion projected more than 100 jobs in the near term and potentially 700 jobs by 2030, although those figures represent planned rather than guaranteed employment (Washington State Department of Commerce, 2025).

Seattle-based Zeno Power, which develops nuclear battery systems for space and other remote applications, is also growing its regional workforce. The company had approximately 60 employees at its South Lake Union headquarters in early 2026 and reported plans to reach roughly 100 employees while evaluating additional headquarters space (Morgan, 2026). This expansion adds another specialized segment to Greater Seattle's space economy: long duration power systems for lunar, deep space, defense, and other missions.

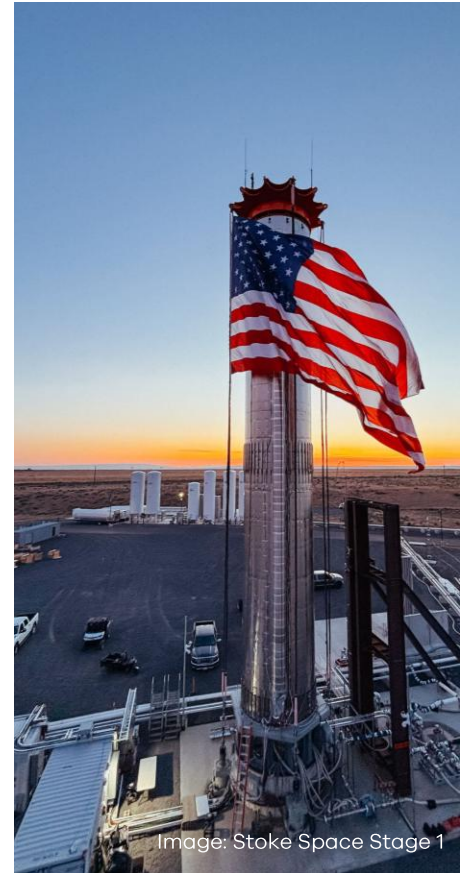


Image: Stoke Space Stage 1

11 Industry Perspectives

To provide qualitative context for the analysis, Greater Seattle Partners conducted interviews with seven industry leaders representing space systems, venture capital, orbital computing, space-based intelligence, aerospace supply chain, and design and innovation. Interviews focused on Greater Seattle's competitive advantages, industry growth opportunities, workforce and supply chain capabilities, and regional business conditions.



Image: Amazon Leo employee on the assembly line

Interview Participants

Company	Interviewee	Perspective
Portal Space Systems	Jeff Thornburg, CEO & CTO	Space systems
Actuate Ventures	Chris Le, Managing Partner	Venture capital
Starcloud	Philip Johnston, Co-Founder & CEO	Orbital compute
BlackSky	Brian O'Toole, CEO	Space-based intelligence
Metal Shorts	Debie Kepl, President	Supply chain
Teague	Mike Mahoney, Senior Director, Space & Defense Programs	Design & innovation
Sophia Space	Brian Monin, Co-Founder & CCO	Orbital compute

Source: Greater Seattle Partners interviews, 2026. Quotes have been lightly edited for grammar, punctuation, and readability without changing the intended meaning

Main Takeaways

01

Talent + Tech Convergence

Space companies repeatedly point to the combination of spacecraft engineering, software, cloud, and AI talent as a defining regional advantage.

02

Aerospace Heritage + Supply Chain

Established aerospace experience, Boeing-linked know-how, and an established supplier base continue to support new space growth.

03

Commercial Growth Opportunity

Interviewees see opportunity in satellite production, in-space infrastructure, orbital compute, manufacturing, servicing, and logistics.

04

Business Climate Matters

Several leaders praised local support while also raising concerns about costs, taxes, incentives, and overall business competitiveness.

Talent and Technology Convergence

The strongest and most consistent theme across interviews was Greater Seattle's combination of aerospace engineering and technology talent. Interviewees emphasized that the region's space industry benefits not only from traditional aerospace expertise, but also from deep capabilities in software, cloud computing, artificial intelligence, and digital engineering.

Jeff Thornburg, CEO and CTO of Portal Space Systems, described talent as a primary factor driving company formation in the region:

The talent pool is the biggest draw. Companies form in Seattle because that's where the spacecraft engineering talent lives today.

”

Jeff Thornburg, CEO & CTO, Portal Space Systems

Thornburg also emphasized the increasing importance of Greater Seattle's technology sector to the development of space systems, particularly as spacecraft become increasingly software- and AI-driven.

This convergence extends beyond established aerospace companies. Actuate Ventures Managing Partner Chris Le noted that the startup ecosystem draws from both established aerospace expertise and technology companies such as Amazon and Microsoft. Similarly, Teague's Mike Mahoney described Greater Seattle as having one of the country's more diversified talent pools in terms of both technical skills and industry experience.

BlackSky CEO Brian O'Toole reinforced this convergence from the perspective of space-based intelligence, pointing to the combination of high volume satellite manufacturing and AI-first systems:

BlackSky has deep roots in the area and has thrived by fusing high-volume, small-satellite manufacturing with AI-first innovation across our entire architecture, further cementing Seattle as a major contributor to the global space economy.

”

Brian O'Toole, CEO, Blacksky

The combination of aerospace, cloud computing, AI, and software expertise represents an increasingly important competitive advantage as commercial space systems become more autonomous, data-intensive, and digitally integrated.

Aerospace Heritage and Supply Chain

Interviewees also identified Greater Seattle's long aerospace history as an important foundation for the commercial space economy. Boeing's regional presence has contributed to generations of engineering, manufacturing, technical, and supplier expertise that newer space companies can draw upon.

Metal Shorts President Debie Kepl emphasized the importance of this accumulated knowledge, noting that Boeing and the broader aerospace industry have created a workforce and supplier ecosystem with extensive experience supporting highly technical manufacturing.

Portal Space Systems similarly identified the region's aerospace supply chain as an advantage, particularly because local workers and suppliers are already accustomed to aerospace production standards and requirements.

The benefits extend beyond companies directly classified within the space industry. Kepl described significant spillover effects for suppliers and service providers:

The space industry has a huge trickle-down effect. Our companies that we work with, all the jobs that have been created there because we are buying more from them, it's critical for our area.



Debie Kepl, President, Metal Shorts

These perspectives suggest that Greater Seattle's competitive position is supported not only by major space companies, but by a broader industrial base that includes machining, metals, electronics, engineering services, fabrication, testing, and other specialized suppliers.

Commercial Growth Opportunities

Interviewees identified several areas where they expect commercial space activity to expand, including satellite production, in-space infrastructure, orbital computing, servicing, logistics, manufacturing, and national security applications.

Actuate Ventures identified satellite production as an established regional capability while pointing to in-space manufacturing, repair, logistics, and power infrastructure as potential next-stage markets. Portal Space Systems similarly highlighted opportunities related to orbital data centers, AI infrastructure, and advanced spacecraft operations.

Starcloud's experience provides a particularly direct example of how Greater Seattle's capabilities can influence company location decisions. Co-Founder and CEO Philip Johnston explained that the company initially started in Southern California before relocating to Redmond:

We started in El Segundo in LA because we thought that's where the space talent was. A few months in we decided to move up to Redmond since we realized that almost everyone that knows how to mass produce satellites is in Redmond with both Starlink and Amazon Leo based here.



Philip Johnston, Co-Founder & CEO, Starcloud

Sophia Space also described the intersection of aerospace expertise and cloud and AI computing as an important advantage. The company maintains product and business operations in Seattle

alongside hardware activities in Southern California, reflecting the complementary capabilities of the two aerospace markets.

Taken together, the interviews suggest that Greater Seattle is positioned not only within established satellite and launch markets, but also within emerging segments of the commercial space economy where aerospace hardware increasingly intersects with computing, AI, autonomy, and data infrastructure.

Business Climate and Regional Competitiveness

Interviewees were generally positive about Greater Seattle's workforce, technology ecosystem, supplier base, and local industry relationships. Several also described supportive relationships with local and state officials and highlighted the willingness of regional companies to collaborate.

At the same time, business climate emerged as a recurring concern. Interviewees cited operating costs, taxes, incentives, and the broader cost of doing business as potential disadvantages relative to competing aerospace regions.

Portal Space Systems noted that stronger state tax and incentive policies could improve Washington's competitiveness for future investment. Metal Shorts similarly identified rising business costs as a challenge for companies operating in the region.

This concern is notable because it cuts across different parts of the ecosystem, including space systems, suppliers, and investment. It does not establish that Washington is uniformly less competitive on cost, but it does indicate that business environment and incentive design are material location and expansion factors that warrant direct benchmarking against peer states.

Greater Seattle's substantial talent and ecosystem advantages do not eliminate competition from other U.S. space markets. Maintaining the region's position will likely depend not only on its technical capabilities, but also on its ability to provide a competitive environment for companies seeking to establish, expand, and scale operations.

Interviews reinforce the report's quantitative findings: Greater Seattle's distinctive proposition is the combination of aerospace heritage, advanced technology, specialized talent, and commercial space activity. Continued growth will depend on translating those strengths into sufficient workforce, industrial capacity, supplier readiness, and a competitive environment for investment and expansion.



Strategic Priorities

Greater Seattle enters the next phase of commercial space growth with significant advantages, but competing regions are actively building many of the same capabilities. Maintaining the region's position will require scaling the workforce, supplier base, industrial capacity, federal market connectivity, and emerging technology clusters that differentiate Greater Seattle today. Regional strategy should therefore focus both on defending established strengths and accelerating areas where the market is moving next.

The priorities below reflect opportunities identified through broad research, competitive benchmarking, and industry perspectives included in this report. A recurring finding in stakeholder interviews was concern about operating costs, taxes, incentives, and overall business competitiveness. Because these factors can shape company location and expansion decisions, the issue is treated here as a strategic priority rather than only as a competitive risk. The recommendations are intended as areas for regional focus rather than a comprehensive implementation plan; specific initiatives would require further engagement with industry, government, education, and other regional partners.

Pillar 1: Scale the Regional Space Ecosystem

Build a space-specific workforce scaling strategy

Expand pathways for technicians, manufacturing workers, electronics specialists, quality professionals, and test personnel alongside advanced engineering programs. Employer-defined competencies, short cycle credentials, and stronger transitions from aerospace and adjacent manufacturing could help expand the talent pipeline for growing space employers.

Accelerate supplier entry into commercial space

Help qualified aerospace and advanced manufacturing suppliers navigate space sector standards, customer requirements, contracting pathways, and production expectations. Greater participation by existing regional suppliers could deepen the local value chain and support the scaling of newer space companies.

Protect industrial scaling capacity

Monitor facility availability, industrial land, testing capacity, power requirements, and major permitting constraints in corridors where space companies are growing. Space-ready industrial capacity should be considered part of the region's economic development infrastructure.



Image: Blue Origin, New Glenn

Benchmark and strengthen the space sector business environment

Establish a recurring comparison of Washington's tax structure, discretionary incentives, financing tools, workforce support, and sector specific programs against Colorado, California, Texas, Florida, Virginia, and Arizona. The immediate goal should be to identify where existing Washington programs already compete effectively, where commercial space companies are not adequately served by existing aerospace program definitions, and where targeted changes could materially affect retention, expansion, or attraction decisions. This work should distinguish between direct subsidies, financing and infrastructure tools, workforce support, and tax treatment rather than treating all incentives as interchangeable.

Pillar 2: Strengthen Greater Seattle's Market Position

Position Greater Seattle around aerospace + technology convergence

Develop a differentiated external narrative centered on the intersection of aerospace, software, cloud computing, AI, autonomy, satellite connectivity, and advanced manufacturing. This positioning is more closely aligned with Greater Seattle's existing capabilities than a generic effort to market the region simply as a "space hub."

Strengthen federal market connectivity

Expand connections between regional companies and NASA, the U.S. Space Force, the Department of Defense, and other federal customers and programs. Targeted business development, convenings, and greater visibility for regional capabilities could help offset Greater Seattle's comparatively limited federal space institutional presence. Pair this work with an annual USAspending-based benchmark of space related obligations by place of performance so the region can track whether its share of federal investment is increasing relative to peer markets.

Support the emerging orbital infrastructure cluster

Increase visibility and connectivity among companies working in orbital servicing, maneuverable spacecraft, propulsion, in-space logistics, sensing, and computing. These activities represent opportunities to diversify the regional space economy beyond satellite production while continuing to leverage Greater Seattle's aerospace and technology strengths.



Pillar 3: Build the Evidence Base

Measure the space economy separately from broad aerospace

Establish a repeatable regional framework for tracking core space companies, employment, facilities, investment, federal contracts, and growth. Better space specific measurement would make future analysis more precise, improve benchmarking, and reduce reliance on broad aerospace indicators that do not fully capture the commercial space economy.

Maintain an annual regional space activity dashboard

Track a consistent set of indicators including company formation, employment, major facilities, disclosed investment, job postings, occupational demand, and significant expansion announcements. A recurring dashboard would make changes in the cluster visible between larger research studies.

Institutionalize a current economic impact baseline and track federal investment

Incorporate the forthcoming BERK statewide study as the new benchmark for economic activity, direct, indirect, and induced employment, labor income, fiscal impacts, and supply chain effects, then establish a regular refresh cycle. Pair each baseline with transparent forward-looking scenarios so regional leaders can quantify both the sector's current scale and the economic value at stake. Maintain a separate annual federal investment tracker that distinguishes announced contract ceilings, obligated dollars, place of performance, and national company awards whose Greater Seattle share is unknown. Continue monitoring NASA, Department of Defense, U.S. Space Force, SBIR/STTR, and other federal awards to regional firms to show how federal demand contributes to growth.

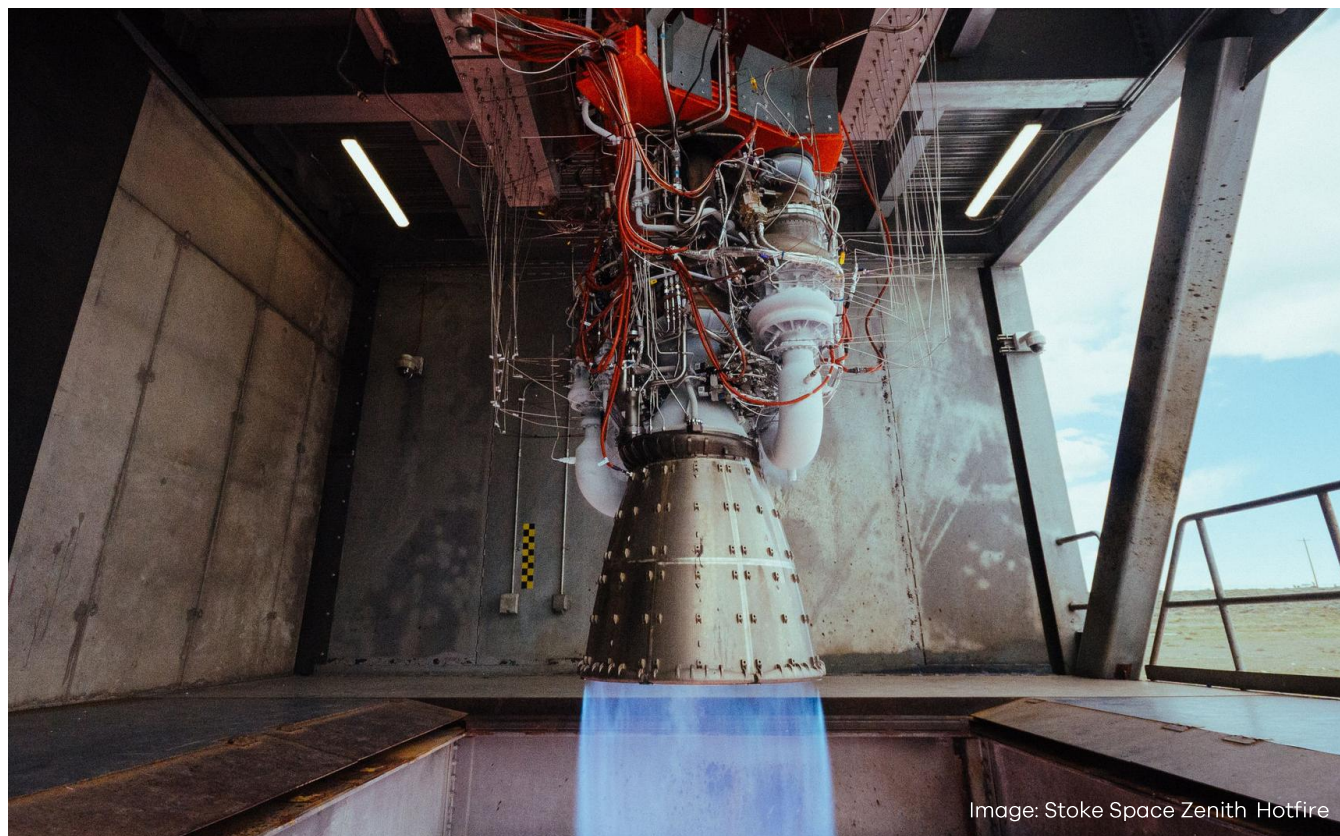
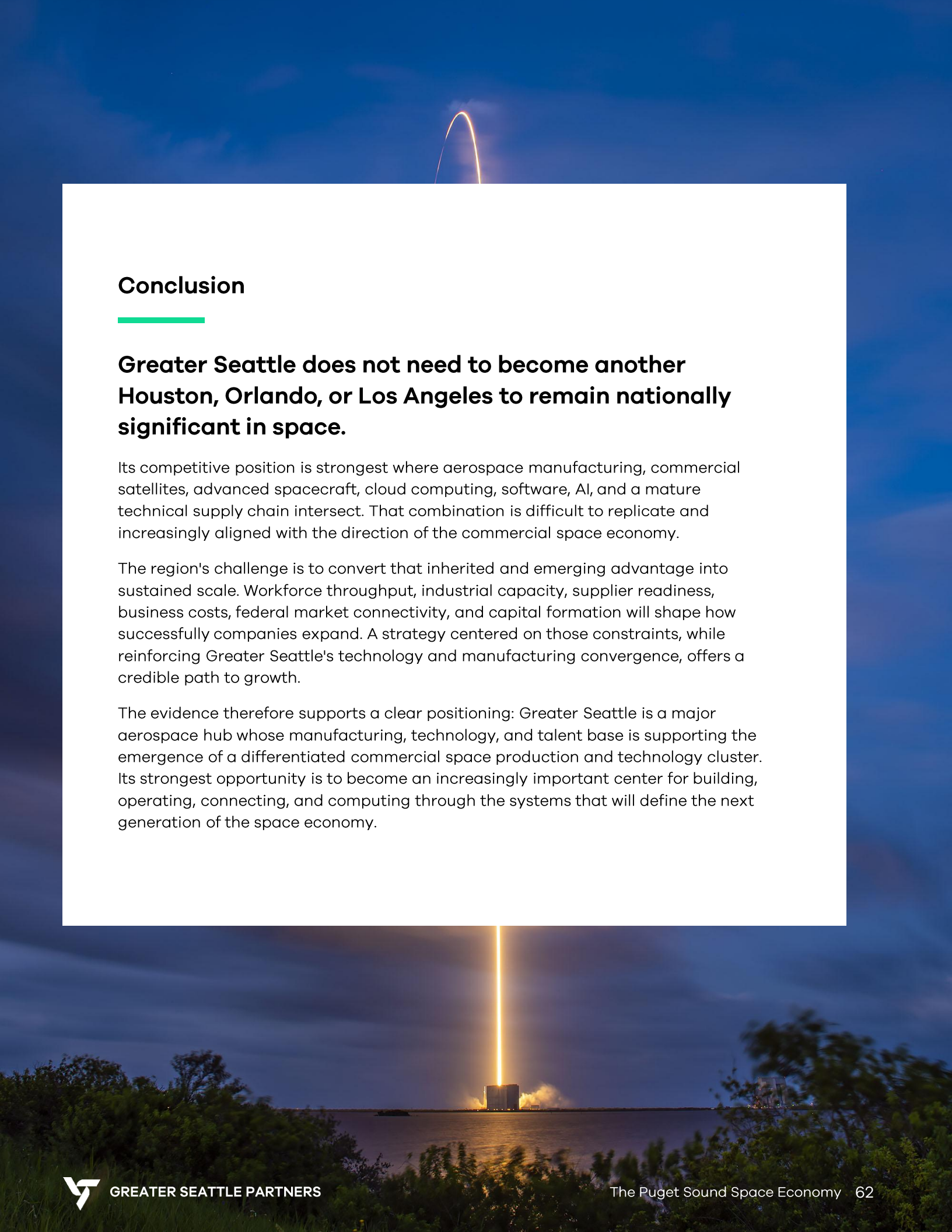


Image: Stoke Space Zenith Hotfire



Conclusion

Greater Seattle does not need to become another Houston, Orlando, or Los Angeles to remain nationally significant in space.

Its competitive position is strongest where aerospace manufacturing, commercial satellites, advanced spacecraft, cloud computing, software, AI, and a mature technical supply chain intersect. That combination is difficult to replicate and increasingly aligned with the direction of the commercial space economy.

The region's challenge is to convert that inherited and emerging advantage into sustained scale. Workforce throughput, industrial capacity, supplier readiness, business costs, federal market connectivity, and capital formation will shape how successfully companies expand. A strategy centered on those constraints, while reinforcing Greater Seattle's technology and manufacturing convergence, offers a credible path to growth.

The evidence therefore supports a clear positioning: Greater Seattle is a major aerospace hub whose manufacturing, technology, and talent base is supporting the emergence of a differentiated commercial space production and technology cluster. Its strongest opportunity is to become an increasingly important center for building, operating, connecting, and computing through the systems that will define the next generation of the space economy.

Appendix



Appendix A. Industry Perspectives Interviews

All quotes and company descriptions from the report’s industry perspectives interviews can be found below.

Interview Participants		
Company	Interviewee	Perspective
Portal Space Systems)	Jeff Thornburg, CEO & CTO	Space systems
Actuate Ventures	Chris Le, Managing Partner	Venture capital
Starcloud	Philip Johnston, Co-Founder & CEO	Orbital compute
BlackSky	Brian O’Toole, CEO	Space-based intelligence
Metal Shorts	Debie Kepl, President	Supply chain
Teague	Mike Mahoney, Senior Director, Space & Defense Programs	Design & innovation
Sophia Space	Brian Monin, Co-Founder & CCO	Orbital compute

Source: Greater Seattle Partners interviews, 2026. Quotes have been lightly edited for grammar, punctuation, and readability without changing the intended meaning

SPACE SYTEMS

Portal Space Systems
Jeff Thornburg, CEO & CTO | Bothell, Washington

Portal Space Systems is a Bothell-based space technology company developing highly maneuverable spacecraft designed to operate and reposition rapidly in orbit. Its propulsion and spacecraft platform is intended to support missions such as space mobility, national security, satellite servicing, and responsive space operations.

“The talent pool is the biggest draw. Companies form in Seattle because that's where the spacecraft engineering talent lives today.”

TECH + AI ECOSYSTEM

“The tech ecosystem is critical. Everything is software driven and AI driven. All of those big software companies like Amazon and Microsoft are critical to creating talent and partnering around how we employ space vehicles and technology in the future. That is an accelerant to the space sector in the Greater Seattle area. It's a huge advantage over other areas. You're going to need AI talent.”

AEROSPACE SUPPLY CHAIN

“The supply chain is more robust because of the aircraft industry, driven primarily by Boeing. And the labor force is accustomed to aerospace, which is helpful.”

EMERGING MARKET OPPORTUNITY

"Data centers in orbit and the training of AI are a huge opportunity. You should want to come here sooner rather than later."

BUSINESS CLIMATE

"Our local and state reps are supportive of what we are doing. There's more the state could be doing from a tax and incentive standpoint. If Washington doesn't become more business friendly, they are going to lose out on opportunities."

VENTURE CAPITAL

Actuate Ventures

Chris Le, Managing Partner | Seattle, Washington

Actuate Ventures is a Seattle-based venture capital firm focused on early-stage technology companies, particularly in aerospace, defense, advanced manufacturing, and other deep-tech sectors. The firm provides capital and strategic support to founders building technologies with commercial and national security applications.

"The startup scene easily pulls from the amazing expertise that you'd find from Microsoft, Amazon, etc. The new wave of space tech isn't just those coming from legacy aerospace, but all the amazing creators from other industries."

WHERE THE MARKET IS GOING

"Satellite production is table stakes here. Second is larger scale infrastructure: in-space manufacturing and repair, logistics, power. The DoD and other government customers will continue to have an impact; however, the vast majority will be on the commercial end."

REGIONAL ADVANTAGE

"The long history of commercialized space technologies, aerospace knowledge, and now pure technical talent make this region prime. The greater metro produces upwards of 90% of the world's satellites this year."

Interviewee estimate; not independently verified by Greater Seattle Partners.

COMMUNITY

"We excel at building community connections between industry and people. Other regions may have a better end-to-end ecosystem, but they rarely 'impact humanity'."

SUPPLY CHAIN

Metal Shorts

Debie Kepl, President | Tukwila, Washington

Metal Shorts is a locally owned metal service center and distributor based in Tukwila. The company supplies steel, aluminum, stainless steel, and other metals in both small and large quantities. It also offers cut-to-size services and can coordinate fabrication, heat treating, galvanizing, priming, and other processing for customers throughout the Puget Sound region.

"The space industry has a huge trickle-down effect. Our companies that we work with, all the jobs that have been created there because we are buying more for them, it's critical for our area. If that were to go away, it would be devastating."

AEROSPACE HERITAGE

"The region's aerospace heritage is extremely important. Boeing started here. There's so much knowledge and so many people who have worked there for so long."

TECH SPILLOVERS

"The tech ecosystem is critical to the space industry and my company. My business has completely changed. It's huge. And it allowed me to grow and open doors that never would have opened without them. And I'm supporting other businesses in the area, so everybody is benefiting. We're employing people, buying equipment, everyone is able to have jobs because of what the tech ecosystem is doing."

COST + BUSINESS CLIMATE

"I think the cost is hard; the state doesn't make it easy to do business. But every aspect of my business, everything is up at least 30%. I wish that the legislature would be a little more business friendly."

INDUSTRIAL CAPACITY + PARTNERSHIPS

"There's so much space here. You think about all the industrial warehouses; there's a ton of openings. There's a lot of space for people, and we could definitely use more business. There's a lot of local companies that are willing to partner and have those relationships."

ORBITAL COMPUTE

Starcloud

Philip Johnston, Co-Founder & Chief Executive Officer | Redmond, Washington

Starcloud is a space technology startup developing orbital data centers: satellites equipped with high performance computing infrastructure to run AI and other compute-intensive workloads in space. Its approach aims to take advantage of abundant solar energy and space-based cooling while reducing some of the energy and infrastructure constraints associated with terrestrial data centers.

"We started in El Segundo in LA because we thought that's where the space talent was. A few months in we decided to move up to Redmond since we realized that almost everyone that knows how to mass produce satellites is in Redmond with both Starlink and Amazon Leo based here."

SPACE-BASED INTELLIGENCE

BlackSky

Brian O'Toole, CEO | Greater Seattle roots

BlackSky is a real time, space-based intelligence company that delivers on demand, high frequency imagery, analytics, and monitoring of critical global locations, economic assets, and events.

"Seattle is leading in the evolution of commercial space. From space-based intelligence to human space flight to fundamental research, the region excels with an abundance of elite, cloud-native tech talent alongside a well-established legacy of advanced aerospace manufacturing. BlackSky has deep roots in the area and has thrived by fusing high volume, small satellite manufacturing with AI-first innovation across our entire architecture, further cementing Seattle as a major contributor to the global space economy."

ORBITAL COMPUTE

Sophia Space

Brian Monin ,Co-Founder & Chief Commercial Officer | Seattle operations | California-based

Sophia Space is an aerospace technology company focused on developing and deploying orbital compute and data centers to process AI workloads closer to where data is collected, reducing latency and bandwidth demands while addressing limitations of terrestrial data centers.

“At Sophia Space, our orbital compute solution is powered by the best of hardware and software working autonomously, networked, and efficiently in low-Earth orbit. The same is true for our human resources and business development; that's why we have a hardware lab in Pasadena and product and business operations in Seattle. The double helix of aerospace expertise and cloud & AI computing, spanning Southern California to the PNW, is a force multiplier for us.”

DESIGN + INNOVATION

Teague

Mike Mahoney, Senior Director, Space & Defense Programs | Seattle, Washington

Teague is a Seattle-based design and innovation consultancy that works with companies to develop new products, experiences, and technologies. The firm is particularly known for its long history in aviation and aerospace, while also providing industrial design, engineering, digital design, and strategic consulting across a range of industries.

“The tech ecosystem is super critical and relevant to the space industry. This region is tough to beat when finding talent and will become increasingly more relevant.”

AEROSPACE FOUNDATION

“Aerospace heritage is a big part of the foundation here, and the reason why a lot of companies are coming. A healthy diversity is going to include the heritage and the new startups too.”

DIVERSIFIED TALENT

“Greater Seattle has one of the more diversified talent pools in the U.S. in terms of skill sets and industries, which is probably pretty unique.”

Appendix B. References and Data Sources

The report prioritizes official and primary sources where available, supported by proprietary labor-market and startup databases and Greater Seattle Partners stakeholder interviews. Key sources used are listed below.

Source	Use / Reference
Lightcast, Industry Snapshot Reports, Q3 2026	Labor-market and industry benchmarking using the consistent 36-industry aerospace definition and MSA geography. Proprietary database.
Crunchbase, Startup Report, September 2026	Startup formation and disclosed funding comparison. Proprietary database; private-company figures can lag public announcements.
Space Northwest. 2026 Washington Space Economic Impact Report (preliminary findings; research and analysis by BERK Consulting and Alliance Velocity, LLC)	Statewide space sector economic impact, including direct and total economic output, employment, labor income, multiplier effects, startup investment, workforce composition, and satellite manufacturing activity. https://www.linkedin.com/company/spacenorthwest/posts/?feedView=all
Amazon. Project Kuiper is now Amazon Leo (2025)	Current program naming and Amazon Leo context. https://www.aboutamazon.com/news/amazon-leo/project-kuiper-becomes-amazon-leo
University of Washington. Washington's first student-built satellite preparing for launch (2019)	HuskySat-1 and multidisciplinary student spacecraft experience. https://environment.uw.edu/news/2019/11/washingtons-first-student-built-satellite-preparing-for-launch/
University of Washington Research. Washington NASA Space Grant Consortium	NASA-oriented STEM education and workforce mission. https://research.washington.edu/centers/washington-nasa-space-grant-consortium/
Lake Washington Institute of Technology. LWTech Students Team Up with Amazon LEO to Launch Their Space Careers (2025)	Aerospace assembly and manufacturing certificate partnership. https://www.lwtech.edu/news/lwtech-amazon-leo.aspx
Everett Community College. Advanced Manufacturing and Aerospace	Composites, precision machining, mechatronics, technical design, avionics, and related technician programs. https://www.everettcc.edu/educational-options/pathways/advanced-manufacturing-and-aerospace/
AJAC. Advanced Manufacturing Apprenticeships	Employer-driven registered apprenticeship and manufacturing training. https://www.ajactraining.org/
Portal Space Systems. Raises \$50 Million Series A (2026)	2026 company funding and expansion cross-check. https://www.portalsystems.space/news/press-release-portal-space-systems-raises-50-million-series-a-to-advance-rapidly-maneuverable-spacecraft-capabilities

Source	Use / Reference
Starcloud. \$250 million Series A extension (2026)	2026 funding and regional manufacturing expansion cross-check; total capital raised reached \$450 million. https://www.businesswire.com/news/home/20260821884035/en/
Gravitics. Space Force STRATFI / Orbital Infrastructure (2026)	2026 STRATFI context: \$30.0 million federal firm-fixed-price contract with a required \$30.0 million company match, for up to \$60 million total effort. https://www.gravitics.com/news/space-force-stratfi-execution-orbital-infrastructure/ ; https://www.sec.gov/Archives/edgar/data/720762/000149315226042269/forms-4a.htm
Stoke Space. Stoke Space Raises \$1 Billion to Accelerate Fully Reusable Launch (2026)	September 8, 2026 Series E cross-check; \$1.0 billion initial closing brings total capital raised to \$2.3 billion. https://www.stokespace.com/news/stoke-space-series-e
Firefly Aerospace. Acquisition of Spaceflight Inc. (2023)	Current ownership/status of Spaceflight operations in Bellevue. https://fireflyspace.com/news/firefly-aerospace-announces-strategic-acquisition-of-spaceflight-inc-to-bolster-on-orbit-services/
aVenture. Xplore Funding History (updated 2026)	Secondary private-market cross-check for Xplore founding year and cumulative disclosed financing: \$25.2 million total, including a \$16.2 million 2022 Series A. https://aventure.vc/companies/xplore-redmond-wa-us/fundraising
Greater Seattle Partners stakeholder interviews, 2026	Primary research with Portal Space Systems, Actuate Ventures, Starcloud, BlackSky, Metal Shorts, Teague, and Sophia Space.
Washington Department of Revenue. Aerospace tax incentive programs (2026)	Washington aerospace B&O credits, property-tax credits, sales/use exemptions, and statutory eligibility definitions. https://dor.wa.gov/taxes-rates/tax-incentives/tax-incentive-programs
Washington State Department of Commerce (2025) and Washington Economic Development Finance Authority (WEDFA)	Strategic Reserve Fund example for Portal Space Systems and conduit financing for eligible capital projects. https://www.commerce.wa.gov/governor-ferguson-awards-350k-to-portal-space-systems-for-bothell-expansion/ ; https://wedfa.org/faq.html
Colorado Office of Economic Development and International Trade. Job Growth, Strategic Fund, and Advanced Industries programs (2026)	Performance-based job tax credits, cash job-growth incentives, and Advanced Industries grants that explicitly include aerospace. https://oedit.colorado.gov/job-growth-incentive-tax-credit ; https://oedit.colorado.gov/strategic-fund-job-growth-incentive ; https://oedit.colorado.gov/advanced-industries-accelerator-programs
California Governor's Office of Business and Economic Development. California Competes and Manufacturing Incentives (2026)	Competitive income-tax credits, partial sales/use tax exemption for qualified manufacturing and R&D equipment, and advanced manufacturing support. https://business.ca.gov/california-competes-tax-credit/ ; https://business.ca.gov/industries/manufacturing/

Source	Use / Reference
Office of the Texas Governor and Texas Space Commission. TEF, JETI, and SEARF (2026)	Deal-closing grants, property-tax limitation for qualifying major projects, and dedicated space/aeronautics grants. https://gov.texas.gov/business/page/texas-enterprise-fund ; https://gov.texas.gov/business/page/texas-jobs-energy-technology-and-innovation-jeti ; https://space.texas.gov/grants
Space Florida and Florida Department of Transportation. Financial Toolkit and Spaceport Improvement Program (2026)	Sector-specific conduit financing, synthetic leases, tax efficiencies, and state-funded spaceport infrastructure. https://www.spaceflorida.gov/financial-toolkit ; https://www.fdot.gov/spaceport/operations
Virginia Economic Development Partnership. Commonwealth's Development Opportunity Fund, VJIP, and Defense Production Zones (2026)	Deal-closing cash grants, customized recruitment/training support, and local defense-production incentives. https://www.vedp.org/incentive/commonwealths-development-opportunity-fund-cof ; https://www.vedp.org/virginia-jobs-investment-program ; https://www.vedp.org/incentive/defense-production-zones
Arizona Commerce Authority. Aerospace & Defense Financial Incentives and Programs (2026)	Refundable R&D and Qualified Facility credits, training support, and zone-based property-tax incentives relevant to aerospace and defense firms. https://www.azcommerce.com/industries/aerospace-defense/strengths/financial-incentives/ ; https://www.azcommerce.com/industries/aerospace-defense/programs/
World Economic Forum & McKinsey & Company. Space: The \$1.8 Trillion Opportunity for Global Economic Growth (2024)	Global space-economy outlook used for the illustrative 2035 scenarios: \$630B in 2023 to approximately \$1.8T in 2035; 9% overall annual growth, 7% backbone growth, and approximately 5% global nominal GDP comparator. https://www.weforum.org/publications/space-the-1-8-trillion-opportunity-for-global-economic-growth/
Space Foundation. The Space Report 2025 Q2 (2025)	Independent global-market context: \$613B global space economy in 2024, 7.8% year-over-year growth, with the potential to exceed \$1T as early as 2032. https://www.spacefoundation.org/2025/07/22/the-space-report-2025-q2/
Starfish Space. 2026 federal Otter awards (2026b, 2026c)	Space Development Agency \$52.5 million end-of-life disposal contract and U.S. Space Force \$54.5 million APFIT contract. https://www.starfishspace.com/press-release/starfish-space-awarded-first-ever-end-of-life-disposal-contract-for-a-leo-constellation/ ; https://www.starfishspace.com/press-release/starfish-space-awarded-54-5-million-space-force-contract-for-dedicated-otter-satellite-servicing-vehicle/

Source	Use / Reference
NASA. Interlune lunar-resource technology contract (2026a)	NASA \$6.9 million SBIR Phase III contract to Seattle-based Interlune. https://www.nasa.gov/technology/nasa-fosters-development-of-lunar-resource-seeking-technologies/
NASA. Blue Origin Mars Telecommunications Network contract (2026b)	Maximum potential contract value of approximately \$700 million; excluded from the regional baseline because Greater Seattle place-of-performance share is not established. https://www.nasa.gov/news-release/nasa-selects-blue-origin-as-mars-telecommunications-network-provider/
Starfish Space (2024) and NASA (2024). Federal awards	Starfish Space \$37.5 million Space Force STRATFI contract and \$15 million NASA SBIR Phase III contract. https://www.starfishspace.com/press-release/space-systems-command-awards-37-5-million-stratfi-contract-to-starfish-space-for-otter-satellite-augmented-maneuver-mission/ ; https://www.nasa.gov/centers-and-facilities/ames/getting-sspicy-nasa-funds-orbital-debris-inspection-mission/
USAspending.gov and current federal contract award records (re-verified September 24, 2026)	Peer-market federal award examples and methodology in Section 8; obligated amounts, agency, PSC/NAICS, and place of performance. https://www.usaspending.gov/search . Selected award IDs: 80NSSC24K1200; NNG17FD73C; FA881124FB011; 80JSC020F0285; 80TECH24CA002; NNNK15MA50T; NNG17FB00C; 80JSC025F7026; FA254125FB021. Recent modifications were cross-checked against current federal contract reporting.
Progressive Policy Institute. Guenther, M. Leading in the Space Economy: A Strategic Playbook for Governors and Mayors (2026)	National comparison of state/local space-economy strategies; Washington workforce strengths, federal-facility gap, and differences in incentive tools by company stage. https://www.progressivepolicy.org/wp-content/uploads/2026/08/PPI-Space-Economy-Playbook.pdf
Novaspace. Global Space Economy Reaches \$626 Billion, Marking a New Phase of Growth (2026)	Global market context: \$626.4B in 2025, projected to reach \$1.01T by 2034 at a 5.5% CAGR. https://nova.space/press-release/global-space-economy-reaches-626-billion-marking-a-new-phase-of-growth/
U.S. Bureau of Economic Analysis. New and Revised Statistics for the U.S. Space Economy, 2012-2023 (2025)	U.S. national context: \$240.9B gross output, \$142.5B GDP, and 373,000 private-sector jobs in 2023. https://apps.bea.gov/scb/issues/2025/03-march/0325-space-economy.htm
Core Plus Aerospace. 2025 Annual Report	Washington K-12 advanced-manufacturing pipeline: 3,500+ students across 55 partner high schools and skills centers in 2024-25; Boeing-supported teacher training and Student Development Program; more than 1,500 Core Plus Aerospace graduates hired at Boeing since 2015. https://coreplusaerospace.org/2025-annualreport/

Source	Use / Reference
Core Plus Aerospace. Boeing Pre-Employment Training Program (2025)	BPET accelerated hiring pathway for graduates of pre-certified manufacturing programs; more than 250 people hired through BPET in 2025. https://coreplusaerospace.org/2025-annualreport-bpet/
The Museum of Flight. Washington Aerospace Scholars (2026)	High school space/STEM pipeline combining a University of Washington online course, optional UW credit, and a summer residency with mission design and aerospace/NASA mentors. https://www.museumofflight.org/was
Amazon. Career Choice satellite-technician pathway with Lake Washington Institute of Technology (2026)	Specialized six-month satellite-technician certification covering aerospace assembly, electronics manufacturing, fiber optics, and avionics wiring; open to eligible Amazon employees and the public. https://www.aboutamazon.com/news/amazon-leo/amazon-career-choice-satellite-technicians-space-launch
Boeing. Boeing expands workforce pipelines with two-decade college partnership (2026a)	Boeing-Edmonds College partnership supporting hands-on aerospace training, curriculum design, equipment donations, and pathways into manufacturing and technical careers. https://www.boeing.com/content/theboeingcompany/us/en/company/about-bca/washington/boeing-expands-workforce-pipelines-with-two-decade-college-partnership.html
Boeing. Boeing grant opens skilled trades paths for military talent (2026b)	Boeing-sponsored Skilled Trades Academy at Clover Park Technical College: free six-week assembly/electrical training, industry credentials, and BPET pathway for military-connected participants. https://www.boeing.com/features/2026/09/boeing-grant-opens-skilled-trades-paths-for-military-talent
SpaceX. Intern Program (2026)	Paid internship and graduate-engineer program; Redmond and Woodinville are among listed participating locations, with opportunities offered across spring, summer, and fall terms. https://new.spacex.com/internships
Edmonds College. Washington Aerospace Training & Research Center (WATR)	Industry-focused 12-week training pathways in manufacturing core, assembly, composites, quality assurance, and tooling. https://watrcenter.edmonds.edu/programs/class-schedule.html
Joint Center for Aerospace Technology Innovation (JCATI). Program overview, background, and 2026 funded projects (2026)	Washington state-funded university-industry aerospace R&D and workforce-development program focused on TRL 4-7 technology challenges; more than \$18 million in funding since 2012; 199 projects involving 93 aerospace companies; current and recent partners include Blue Origin, Kymeta, Starfish Space, and Juno Propulsion. https://jcati.org/ ; https://jcati.org/node/24 ; https://jcati.org/funding/funded-projects
Amazon.com, Inc. Amazon.com Announces Second Quarter Results (2026a)	Amazon Leo constellation update, including nearly 400 satellites in orbit and initial-service timing. https://www.aboutamazon.com/news/company-news/amazon-earnings-q2-2026-report

Source	Use / Reference
Amazon.com, Inc. Amazon to Acquire Globalstar and Expand Amazon Leo Satellite Network (2026b)	Planned Globalstar acquisition, spectrum and satellite assets, and direct-to-device expansion. https://press.aboutamazon.com/2026/4/amazon-to-acquire-globalstar-and-expand-amazon-leo-satellite-network
Space Northwest. Commercial Space Accelerator (2026)	Regional 12-week commercial space accelerator developed with the Commercial Space Federation and City of Kent support. https://www.spacenorthwest.org/snwaccelerator
Starfish Space. Starfish Space Raises Over \$100 Million Series B (2026a)	April 2026 Series B financing supporting expansion of the company's satellite-servicing business. https://www.starfishspace.com/press-release/starfish-space-raises-over-100-million-series-b/
Seraphim Space Investment Trust. C Share Portfolio Investment in Hubble (2026)	\$30 million August 2026 investment in Hubble Network. https://www.investegate.co.uk/announcement/rns/seraphim-space-investment-trust--ssit/c-share-portfolio-investment-in-hubble/9726207
Integrate. Integrate Raises \$17M Series A (2026)	\$17 million Series A and expansion of its secure project-management platform for government and classified programs. https://integrate.co/blog/integrate-raises-17m-to-commercialize-the-world%E2%80%99s-first-ultra-secure-project-management-platform-for-classified-programs
Sophia Space. 2026 financing announcements (2026a, 2026b)	\$10 million seed financing in February and \$7 million additional financing in June, bringing total reported funding to \$22 million. https://sophia.space/news/sophia-space-closes-10m-seed-round-to-accelerate-orbital-edge-computing ; https://sophia.space/news/sophia-space-pairs-with-apex-for-orbital-computing-demo-announces-22-million-in-total-funding
U.S. Securities and Exchange Commission. Gravitics filing (2026)	Cross-check for the \$30 million federal STRATFI contract and required \$30 million commercial match. https://www.sec.gov/Archives/edgar/data/720762/000149315226042269/forms-4a.htm
Schlosser, K. Cowboy Space raises \$275M as it seeks 40-60 employees for new satellite and rocket hub in Seattle (2026)	Cowboy Space Series B, valuation, Seattle engineering center, and initial hiring plans. https://www.geekwire.com/2026/cowboy-space-raises-275m-as-it-seeks-40-60-employees-for-new-satellite-and-rocket-hub-in-seattle/

Source	Use / Reference
Newmark. Newmark Arranges 291,000-Square-Foot Lease at Seattle-Area Logistics Facility (2026)	Cowboy Space Kent facility, 291,035-square-foot lease, and estimated regional job addition. https://www.nmrk.com/insights/press-releases/newmark-arranges-291-000-square-foot-lease-at-seattle-area-logistics-facility-slated-for-aerospace-manufacturing-conversion
Boyle, A. GeekWire coverage of K2 Space and Starcloud (2026a, 2026b, 2026c)	K2 Space Seattle-area engineering office; K2 Space \$500 million Series D; Starcloud \$250 million financing and 100,000-square-foot Woodinville facility. https://www.geekwire.com/2026/k2-space-satellite-engineering-office-seattle-area/ ; https://www.geekwire.com/2026/k2-space-raises-500m-big-satellites/ ; https://www.geekwire.com/2026/starcloud-250m-data-center-satellite-network-nvidia/
Morgan, R. Seattle company to start hunt for more headquarters space (2026)	Zeno Power South Lake Union employment and 2026 hiring/space-expansion plans. https://www.bizjournals.com/seattle/news/2026/03/03/zeno-power-space-nuclear-battery-lindsey-boles.html
Office of Management and Budget, OMB Bulletin No. 23-01 (2023); U.S. Census Bureau, Metropolitan and Micropolitan Statistical Area Glossary (2026)	Current Metropolitan Statistical Area delineations, county/county-equivalent composition, and MSA definition used for benchmark geography. https://www.whitehouse.gov/wp-content/uploads/2023/07/OMB-Bulletin-23-01.pdf ; https://www.census.gov/programs-surveys/metro-micro/about/glossary.html