



Building the Next Generation of US Spaceports:

Meteoric Growth or Cautionary Tale?

Leading Practices, Lessons Learned,
& Considerations for New Entrants

Summer 2026



Executive Thesis

1

The US launch market has accelerated sharply over the past decade and a half, driven largely by increased commercial demand and falling launch costs from reusable launch vehicles.

2

While this growth has led to the emergence of many new spaceports, most launch activity remains concentrated at established hubs, especially Florida's Cape Canaveral Spaceport (CCS) and California's Vandenberg Space Force Base (VSFB).

3

Competing in this market involves more than just available launch trajectories. New and expanding spaceports should have a successful strategy in place that includes a sustainable, market-driven business model, durable and diversified financing, and long-term investments in infrastructure as well as workforce.

Contents

The US Spaceport System	4
Top Challenges in Spaceport Development	6
<i>Building a Sustainable Business Model</i>	7
<i>Securing Durable Funding</i>	8
<i>Developing & Maintaining Infrastructure Over Time</i>	9
Charting a Path to Success: Practical Steps for Spaceport Development	10
1) <i>Be clear on how location, geography, climate, and infrastructure fill a market gap</i>	10
2) <i>Understand where existing regulations are enabling and restricting</i>	10
3) <i>Analyze the local financial environment and anchor tenant outlook</i>	11
4) <i>Identify availability of relevant workforce (specialized, trade, etc.)</i>	11
5) <i>Assess how modern technology can be a differentiator</i>	11
Key Takeaways	13
Let's Talk	13
Supplement: Tour of US Spaceports	14
Endnotes	29

Atlas V Launches from Cape
Canaveral Space Force Station

Gwendolyn Kurzen



Artemis II Rollout
Photo Credit: Kim Shiflett, NASA

The US Spaceport System

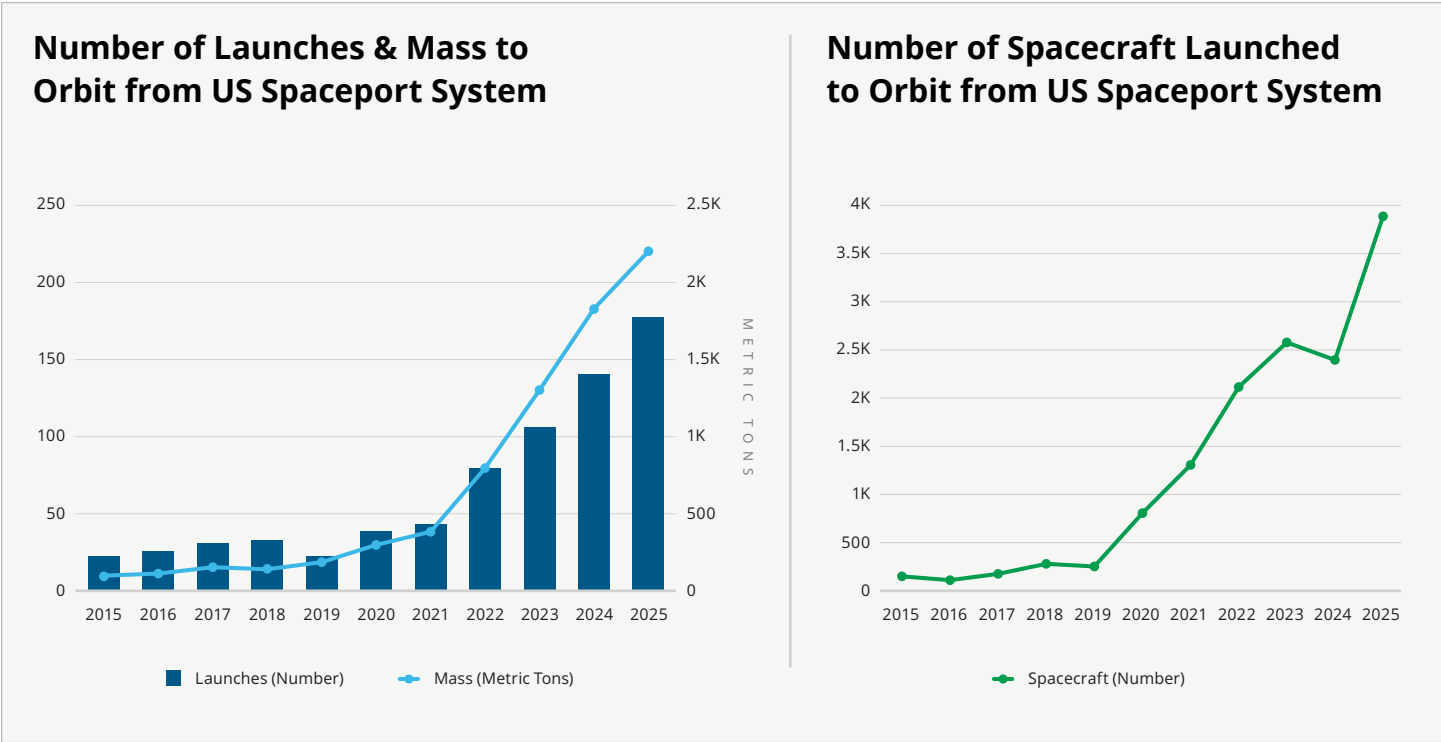
The United States spaceport system sits at the intersection of national security, civil space, and a rapidly-scaling commercial launch market. Operationally, the system functions as a network of ranges, launch and landing sites, processing facilities, and enabling services (e.g., safety, airspace coordination, propellant handling, payload processing, and environmental compliance) that together determine how quickly, safely, and reliably the nation can facilitate access to space.

This system is being reshaped by a sustained surge in launch demand and a rapid shift toward commercial operations, enabled in large part by the proliferation of reusable launch vehicles and the operating cadence made possible.

As seen in [Figure 1](#) below, the United States Spaceport system has experienced exponential growth over the last decade, measured across 3 key markers:

- **US-based orbital launches are up ~800%** from 2015, driven by factors such as the proliferation of reusable launch vehicles, additional commercial launch provider coming online, and the addition of launch sites to the United States Spaceport System over the last decade¹
- **Mass sent to orbit from the United States is up ~2400%** from 2015, driven by the rapid adoption of heavy and superheavy “rideshare” class vehicles capable of lifting unprecedented amounts past the Kármán line²
- **Number of spacecraft sent to orbit from the United States is up ~3200%** from 2015, driven by the small-satellite (+microsats, nanosats) enabled lowered cost barrier to space access and rapid proliferation of LEO constellations³

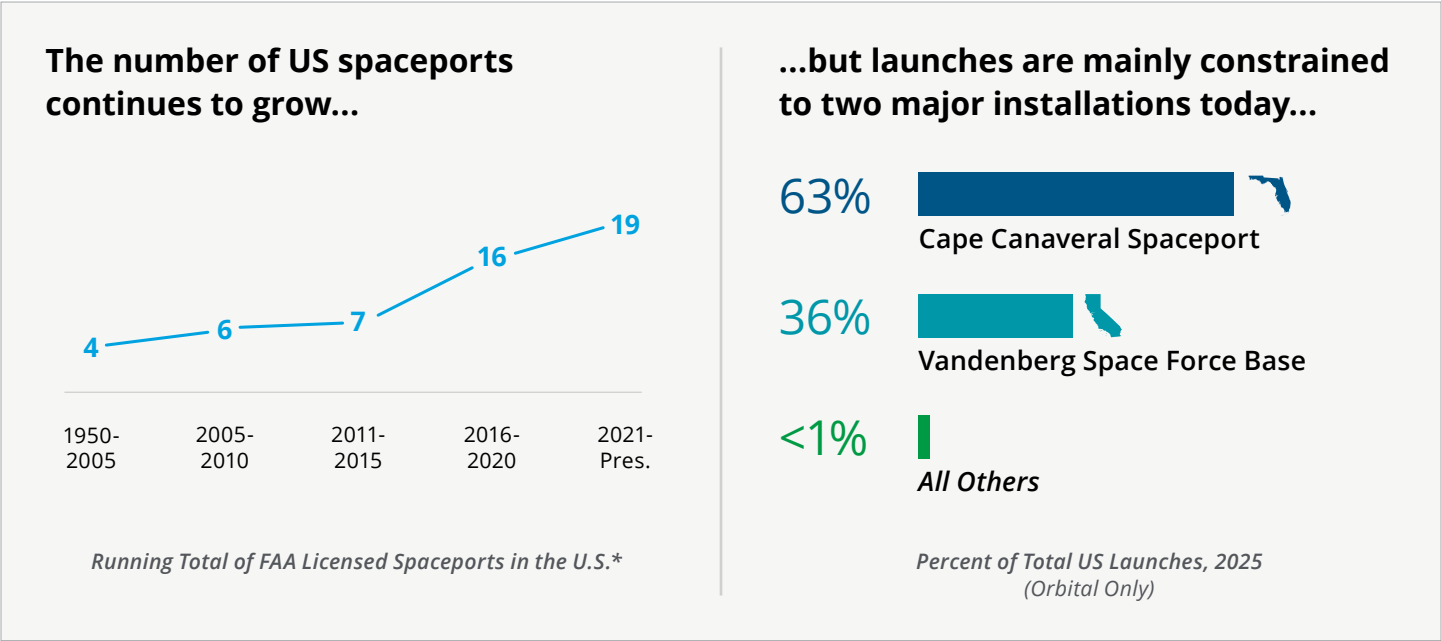
FIGURE 1 | METEORIC RISE: A DECADE OF GROWTH ACROSS THE US SPACEPORT SYSTEM⁴



Source: Seradata by Slingshot Aerospace. Seradata data and analytics are provided by and © Slingshot Aerospace. See www.slingshot.space.

In response to this emergence of launch activity, a growing number of spaceports (both licensed and prospective) have emerged within the United States. Despite the growing number of spaceports, US launch activity remains heavily concentrated at two established hubs: Florida's CCS (made up of Cape Canaveral Space Force Station and Kennedy Space Center) and California's Vandenberg Space Force Base (VSFB), where decades of investment have established robust infrastructure and workforces that can support frequent, low cost per kilogram orbital launch.

FIGURE 2 | LAUNCH LANDSCAPE DICHOTOMY⁵⁶⁷



**does not include FAA-licensed Spaceport Camden, which was abandoned in 2022.*
Source: Seradata by Slingshot Aerospace. Seradata data and analytics are provided by and © Slingshot Aerospace. See www.slingshot.space.

As mid-size and emerging spaceports look to play an expanded role by capitalizing on demand for more capacity, alternative launch concepts, and US launch resiliency, decisionmakers should address several challenges. To help succeed, a central question of alternative spaceports is not “are more spaceports needed”, but rather “which roles are needed, where, and what must be true for success?” As spaceports look for answers to these questions, decisionmakers should recognize the common challenges faced regardless of their role, as well as the steps required to address these challenges. This paper can serve as a practical guide to help spaceports of all maturity levels in navigating a path to successful, sustainable growth.





Top Challenges in Spaceport Development

An understanding of key factors to success is needed in spaceport development and expansion. These factors can be summarized as three core challenges to overcome:



Building a Sustainable Business Model
that addresses market needs



Securing Durable Funding
from federal, state, and private sources



Developing & Maintaining Infrastructure Over Time
as the spaceport scales

Applicable to both existing spaceports looking to expand their capabilities and new spaceports alike, understanding the nuances of how to address these challenges can be vital to long-term success.



Challenge #1: Building a Sustainable Business Model

While spaceport business models can vary significantly in terms of their approach, decisionmakers should consider the same central goal: satisfying addressable, sustainable market demand. Business models in support of this may range from launch, to testing and R&D, to reentry, to space tourism and more.

- **Orbital Launch:** Today, and likely for the foreseeable future, the most common business case for spaceports is launch in support of orbital missions and beyond. While this market need is largely satisfied by CCS and VSFB, other spaceports like the Mid-Atlantic Regional Spaceport (MARS), Pacific Spaceport Complex (Kodiak Island) and Starbase in Boca Chica have played a complementary role in delivering payloads to orbit. As other spaceports look to enter this market, decisionmakers should offer an advantage currently not found within one of these other spaceports, whether it be providing currently underserved launch capacity, supporting alternative launch approaches like horizontal launch that may eventually be cheaper for certain mission profiles, or improving US launch resiliency.
- **Landing & Re-entry:** As missions requiring safe return and recovery of spacecraft, astronauts, and/or materials become more frequent over the next decade, many spaceports are investing in establishing agreements and developing supporting infrastructure to support re-entry as a business. Today, most landing & re-entry operations are in support of booster recovery for vehicles like Falcon 9 (SpaceX) and New Glenn (Blue Origin), both on land and at sea. However, companies like Varda Space and Sierra Space are performing or gearing up for re-entry techniques that don't require vertical landing sites (or drone-ships) using capsules and space planes, respectively. As a result, agreements for return zones, leveraging runways and remote areas have grown in recent years at locations like Huntsville International Air & Spaceport⁸, as well as in the Australian Outback⁹ & the Utah desert.¹⁰ And beyond just supporting landing, spaceports that provide local and modern facilities for processing of returned goods (e.g., pharmaceuticals, materials, etc.) can bring value for operations that are expected to be increasingly in-demand over the decades to come.
- **Research, Development, & Testing:** One market that has seen success for emerging spaceports is supporting research, development, and testing of launch vehicles. SpaceX's Starbase in Texas, as an example, has received attention as the SpaceX team develops and tests its forthcoming vehicle, Starship. CCS serves a similar function for Blue Origin's development of the New Glenn Rocket, with static fire tests and other R&D activities conducted onsite to hone development of the reusable heavy-lift vehicle.¹¹ Other sites like Spaceport America, Mojave Air & Spaceport, Cecil Spaceport, and more have inked agreements with start-ups looking to develop capabilities for sub-orbital, orbital, and hypersonic missions. As these capabilities mature,

it could lay way to concepts like point-to-point launch (P2P) that provide a faster means of transportation than by air alone. Regardless of the targeted business case, spaceport supporting testing and R&D are hoping the success of their tenants will establish their spaceports as established players in the US spaceport system.

- **Manufacturing:** Another critical aspect of space for the US has been the role of domestic manufacturing for rockets, payloads, and more. As more value is captured in building, qualifying, and scaling flight hardware and mission-ready components, attracting and supporting manufacturing facilities are becoming a facet of spaceport success. To capitalize on this need, many spaceports' decision makers are working directly with launch providers and payload developers to localize manufacturing facilities at spaceports, as well as working with industry and academia to build a sustainable workforce in support of manufacturing.^{12 13} Some of the more significant investments in this model include Blue Origin's Rocket Park, Airbus' Small Satellite Manufacturing facility, and SpaceX's Gigabay, all representing manufacturing facilities for spacecraft at CCS.^{14 15} Through these efforts, spaceports are investing in manufacturing as both a key enabler and viable business model.
- **Space Tourism:** For other spaceports, their business case is found not in supporting traditional space functions, but rather in leisure use cases that fall under the umbrella of space tourism. Sites like Spaceport America and Blue Origin's Launch Site One, as examples, have made news in the past five years supporting private launches of celebrities, wealthy individuals, and others selected for short suborbital launches and landings. While the long-term viability of space tourism as an industry remains to be seen, its presence in the space industry cannot be ignored.

Regardless of what approach a spaceport takes, what's clear is that decisionmakers should invest in capabilities that trace back to realizable market value.



SLS on the Pad
Jim Ross, NASA



Challenge #2: Securing Durable Funding

Representing both a critical facet in maintaining its position as the leading nation in space, as well as an opportunity for commercial ventures, the US spaceport system is undergoing a transformative phase marked by a significant influx of federal, state, and commercial funding, totaling an estimated \$3.8 billion in 2025 alone.^{16 17} This availability of new investment has enabled the US spaceport system to respond to the exponential growth in launch demand driven by reusable launch vehicles over the past decade. Within this emergence of new investment, three distinct trends have emerged:

- 1) The vast majority of investment continues to be set aside for modernization efforts or new facilities at CCS and VSFB, as seen through investments of over \$1B and \$700M, respectively, for infrastructure upgrades from commercial and state / federal funding over the past 5 years.^{18 19 20 21}
- 2) While the majority of investment flows towards CCS and VSFB, more and more individual investments are being put towards creating new capabilities at other, smaller spaceports, as well as establishing entirely new spaceports.^{22 23}
- 3) Across both of these trends, the source of spaceport funding is becoming increasingly more diverse, coming from federal, state, and private sources alike.^{24 24 26}

Federal Spaceport Investment: From a federal perspective, the United States Space Force (USSF) is leading spaceport investment, having committed over \$1.3 billion to CCS and VSFB between 2024 and 2028. Named the “Spaceport of the Future” initiative, USSF funding focuses on assured access to space and launch resiliency through common-use infrastructure improvements to the Eastern and Western Ranges.^{27 28} Focus areas of the program include upgrades to physical spaceport infrastructure like roads, bridges, and power,²⁹ as well as creating modern, digital infrastructure that brings automation to manual and labor-intensive processes.³⁰ Additionally, USSF is providing funding to develop new support facilities, as demonstrated by separate ~\$78M awards in 2025 to Lockheed Martin’s Astrotech Space Operations and Blue Origin to develop new satellite processing facilities at VSFB and CCS (respectively).³¹

State Spaceport Investment: At the state-level, more and more states are creating state organizations to support economic development through spaceport investments. Florida, for example, has provided more than \$530M in state funding to its own spaceport system since 2012 by way of the FDOT Spaceport Improvement Program, distributed by its spaceport organization, Space Florida.^{42 43 44} States also have access to a powerful federal financing tool: tax-exempt bonds for spaceport infrastructure. As the table to the right illustrates, more states than ever have dedicated aerospace organizations. As a result, there are more entities that may qualify to serve as tax-exempt

States with Dedicated Space/Aerospace Organizations	
Alabama ³²	Port of Huntsville & Alabama Space Authority
Alaska ³³	Alaska Aerospace Corporation (AAC)
Arizona ³⁴	Arizona Space Commission
California ³⁵	Space Vandenberg
Florida ³⁶	Space Florida
New Mexico ³⁷	New Mexico Spaceport Authority
Oklahoma ³⁸	Oklahoma Department Aeroposace & Aeronatautics (ODAA)
Texas ³⁹	Texas Space Commission
Utah ⁴⁰	47G
Virginia ⁴¹	VCSFA

bond issuers, presenting another potential means to attract infrastructure investment.⁴⁵

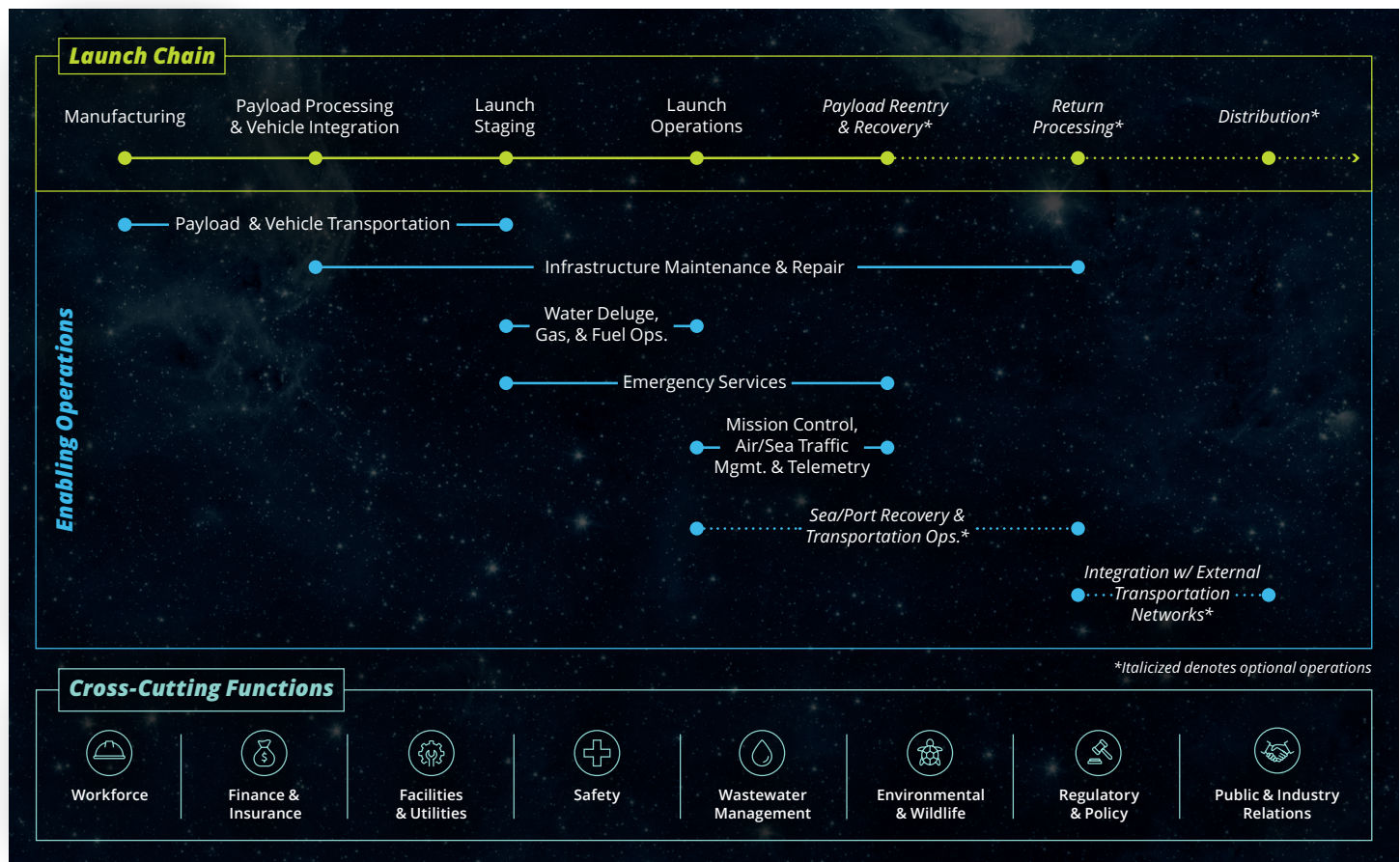
Private Spaceport Investment: Perhaps the most significant funding development over the past two decades has been the growth of private spend at spaceports. Particularly by private launch service providers, organizations like SpaceX and Blue Origin have made significant investments into developing the leased spaceport infrastructure each organization operates within, as well as developing their own private spaceports where testing and development can be performed independently from federal or state installations. SpaceX, for example, has not only created its own spaceport in Texas (Starbase), but also promised \$1.8B in new investment at CCS to support Starship operations.^{46 47 48} Private Equity is also very active in the industry. Investments of over \$1.2 billion in 2025 far exceeded figures of ~\$85 million in 2018 and 2020.⁴⁹

Of note, commercial investment at federal spaceports is restricted to only lease spaces that private launch providers operate from, restricting common use infrastructure to federal and state investments. However, as the incentive to get more mass to space faster and more regularly grows, it is possible this could change through methods like indirect cost reimbursement. Ultimately, spaceport developers should understand how to maximize investment across all three of these funding sources to help achieve success.

Challenge #3: Developing & Maintaining Infrastructure Over Time



FIGURE 3 | SPACEPORT ECOSYSTEM



With funding becoming increasingly more available, and with success increasingly measured in ability to deliver payloads to orbit, many spaceports are turning their focus to eliminating bottlenecks that impede a spaceport's chain of operations. Much of this revolves around how to improve each element of the spaceport system (Figure 3), which begins well before a rocket is launched and does not end until post-launch processing (which can include return or reentry considerations). By thinking of a spaceport's ability to succeed as a relationship with its capacity to efficiently and effectively process payloads through this chain of operations, spaceport success is in many ways a product of how restricting (or enabling) its weakest links are.

Some of the concepts that can drive a spaceport's limiting factors include:

- Aging physical infrastructure and deferred maintenance, both on and around the spaceport
- Range and airspace coordination capacity
- Launchpad repair and preparation time between launches
- Propellant production/storage/transfer and refueling cadence
- Payload processing bottlenecks
- Physical limitations to asset movement on and around the spaceport
- Competing mission requirements
- Workforce availability
- Regulatory and environmental operating constraints

As launch demand pushes for higher mass to orbit and higher tempo, these factors increasingly define real capacity—and shape where targeted upgrades, specialization, or new sites can most effectively relieve pressure on the system.

Charting a Path to Success: Practical Steps for Spaceport Development

While there is no silver bullet to address these three challenges, there are practical steps spaceports can take when considering development or expansion. Through appropriate analysis, planning, and engagement with key stakeholders, spaceports can understand how investments translate to real opportunities. As such, Deloitte provides the following set of steps for spaceports to consider executing before moving forward with plans for expansion (or new spaceports entirely):

1

Be clear on how location, geography, climate, and infrastructure fill a market gap

As spaceport developers consider building a new spaceport or expanding upon an existing one, decisionmakers should begin by establishing a clear market position for how the development addresses a need within the national network. As part of this process, developers should perform a feasibility study that covers:

- What launch trajectories are possible to prove the site offers tangible performance or cost benefits. This analysis should include how launch paths relate to air traffic and overflight corridors, available azimuths, desired inclinations, meteorological windows, and latitude advantages
- How public risk and well-being may be impacted by launches by assessing how potential launch paths cross over or create noise for relevant communities
- An evaluation of the site's physical and operational readiness: logistics access (road/rail/port), payload processing and cleanroom capacity, high-capacity and resilient utilities (power, cryo, water, fiber), and emergency response capabilities for high-hazard operations
- A data-supported view of how the location expands overall national throughput and mission diversity
- How potential weather patterns may impact operations, especially related to common natural disasters for that region (e.g. hurricanes, tornadoes, etc.)

2

Understand where existing regulations are enabling and restricting

Another key step of development plans is mapping the regulatory pathway early, starting with airspace and range operations. Developers should determine early how the site will coordinate with the Federal Aviation Authority (FAA), Air Traffic Control (ATC), and other regulatory agencies to work with commercial aviation, assess telemetry spectrum availability and range readiness, and quantify the expected duration and frequency of airspace or maritime closures per launch.

Additionally, developers should proactively assess how environmental and permitting feasibility will drive schedule risk, including understanding where an Environmental Assessment (EA) or Environmental Impact Study (EIS) will be required. As part of this process, developers should anticipate where mitigations for noise, sonic booms, wildlife, wetlands, and historic or tribal lands may be necessary, and the rough costs of each.

Finally, spaceport developers should perform proactive community engagement using baseline studies and transparent reporting to instill public confidence. Decisionmakers should also have a strategy in place for how potential grievance compensation will be handled so that potential litigation and delays are reduced. This includes clearly communicating the economic benefits spaceport development brings to local and regional communities, such as job creation, infrastructure investment, and supply chain growth, while openly acknowledging and addressing potential environmental impacts. Striking this balance through consistent, transparent outreach helps build durable community trust and reduces the risk of opposition that can stall or derail development timelines. In all, having a holistic regulatory strategy is fundamental to moving efficiently and with minimal disruptions as spaceports are developed.

3

Analyze the local financial environment and anchor tenant outlook

Once developers establish what's possible for a location or spaceport growth opportunity, decisionmakers should pressure test their business case. This should start with reviewing potential anchor tenants with a focus on the maturity of their capabilities and how durable a financing model exists. Specifically, developers should look for demonstrable demand supported by firm commitments, realistic flight cadence ramp-ups, and credible financing and manufacturing/test throughput that prove sustainable operations.

As part of capturing these details, developers should build a master plan and business model that spans 5–10 years, stress-tests the cadence and pricing assumptions, and quantifies revenue and cost projections. Critical to this plan is establishing realistic timelines for development, as well as having investment tied to phased, milestone success. Spaceport developers should also account for contingency plans where milestones fail to be met, fostering accountability between developers and tenants.

Finally, the overall operating model should have a clear governance strategy, including roles, responsibilities, and provisions that dictate risk-sharing between public and private stakeholders. In addition to this governance, spaceport developers should work with stakeholders to account for other financial concepts like availability of insurance, structure of public-private partnerships, and more.

4

Identify availability of relevant workforce (specialized, trade, etc.)

Given that space work often requires specialized roles or trades that are often in short supply nationally (i.e., welders, electricians, etc.), developers should account for how local workforce availability impacts project delivery. This involves a concrete labor strategy for the local ecosystem, spanning coordination with local grade schools, universities, trade schools, community development organizations, and corporations alike. As part of this strategy, developers should have an ongoing mechanism for monitoring figures like role vacancy rates, projected graduates from universities and trade schools, and wage competitiveness (to name a few).

A comprehensive labor strategy also involves proactive, ongoing community outreach that captures qualitative community needs that drive workforce retainment and competitiveness. These social infrastructure factors can range from competitive schools and libraries, healthcare, housing, transportation, and recreational facilities. In monitoring these components, spaceport operators should work with local government to identify and commit investment to making improvements or driving other incentives that attract and retain the appropriate workforce.

5

Assess how modern technology can be a differentiator

As spaceport developers invest in common-use infrastructure, operations should be designed around technologies that materially improve safety, cadence, and cost. Depending on the complexity of the spaceport, concepts like digital twins can improve how design, construction, logistics, and maintenance are managed. Developers should also consider how to integrate concepts like intelligent automation and AI into scheduling, range operations, advanced weather forecasting, and other logistics that improve schedule predictability. Importantly, the spaceport's technology should scale alongside their workforce, procedures, capabilities, and culture as the spaceport becomes more mature.

Finally, as spaceports become a more critical facet of US national security, it is increasingly critical to build cybersecurity and data capabilities into their core architecture. Through coordination with governing bodies and independent cyber strategists, spaceports should understand what cyber postures are most appropriate to maintain mission integrity without introducing burdensome requirements.

In all, it is important that the decisions a spaceport makes related to technology, inclusive of its cyber posture, are made with an appropriate understanding of how investment today addresses an existing or eventual need. Technology investments should not be made in a vacuum separate from the spaceports broader strategy, but rather represent a measurable ROI.

Common Pitfalls of Spaceport Growth

- Shortfall of long-term financing for tenants
- Overreliance on a single provider or an unproven business model
- Geography-market mismatches
- Limited access to specialized workforce
- Lack of relationships with policy makers



A Checklist For Spaceports Navigating Expansion:

- 1) Be clear on how location, geography, climate, and infrastructure fill a market gap
 - » Understand the unique advantages a site offers in the context of the US spaceport system
- 2) Understand where existing regulations are enabling and restricting
 - » Map the regulatory pathway early, starting with airspace and range operations
- 3) Analyze the local financial environment and anchor tenant outlook
 - » Pressure-test the business case and economic benefits around likely anchor tenants; understand support and options for public investment
- 4) Identify availability of relevant workforce (specialized, trade, etc.)
 - » Have a concrete labor strategy that recognizes the limitations (and benefits) of the local ecosystem
- 5) Assess how modern technology can be a differentiator
 - » Design operations around technologies that materially improve safety, cadence, and cost



What Successful Spaceports Do Well

- Diversify across providers and use-cases
- Pick providers with sustainable financing
- Understand their role in the market
- Use relationships to shape policy
- Engage community and workforce
- Continuously modernize infrastructure

Key Takeaways

A spaceport is an ecosystem bet, not a single-tenant facility. While launch volumes are poised to rise over the next decade, not every state needs or benefits from a spaceport; duplication without differentiation risks stranded assets and community pushback. Some of the most resilient models blend multi-tenant delivery of services that address market demand with a deep supplier base, trained workforce, robust utilities, and strong range/airspace coordination. This, together with access to reliable and responsible financing, insurability, safety culture, and community license to operate can be key contributors to success. The right projects should show clear market fit, regulatory feasibility, and a credible path to cadence, supported by transparent governance and lifecycle O&M planning.

Combining strong, creditworthy tenants with milestone-triggered public investment, competitive geography that offers safe corridors and productive launch windows, and an ecosystem mindset that builds technology advantage and workforce pipelines could be the key to success. Done well, this approach adds resiliency and specialization to the US spaceport network that can bolster the space economy and delivery durable local economic growth to local communities.

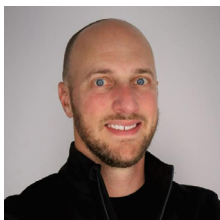
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Let's Talk



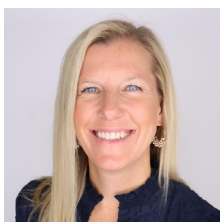
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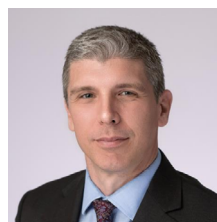
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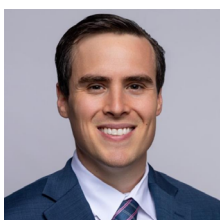
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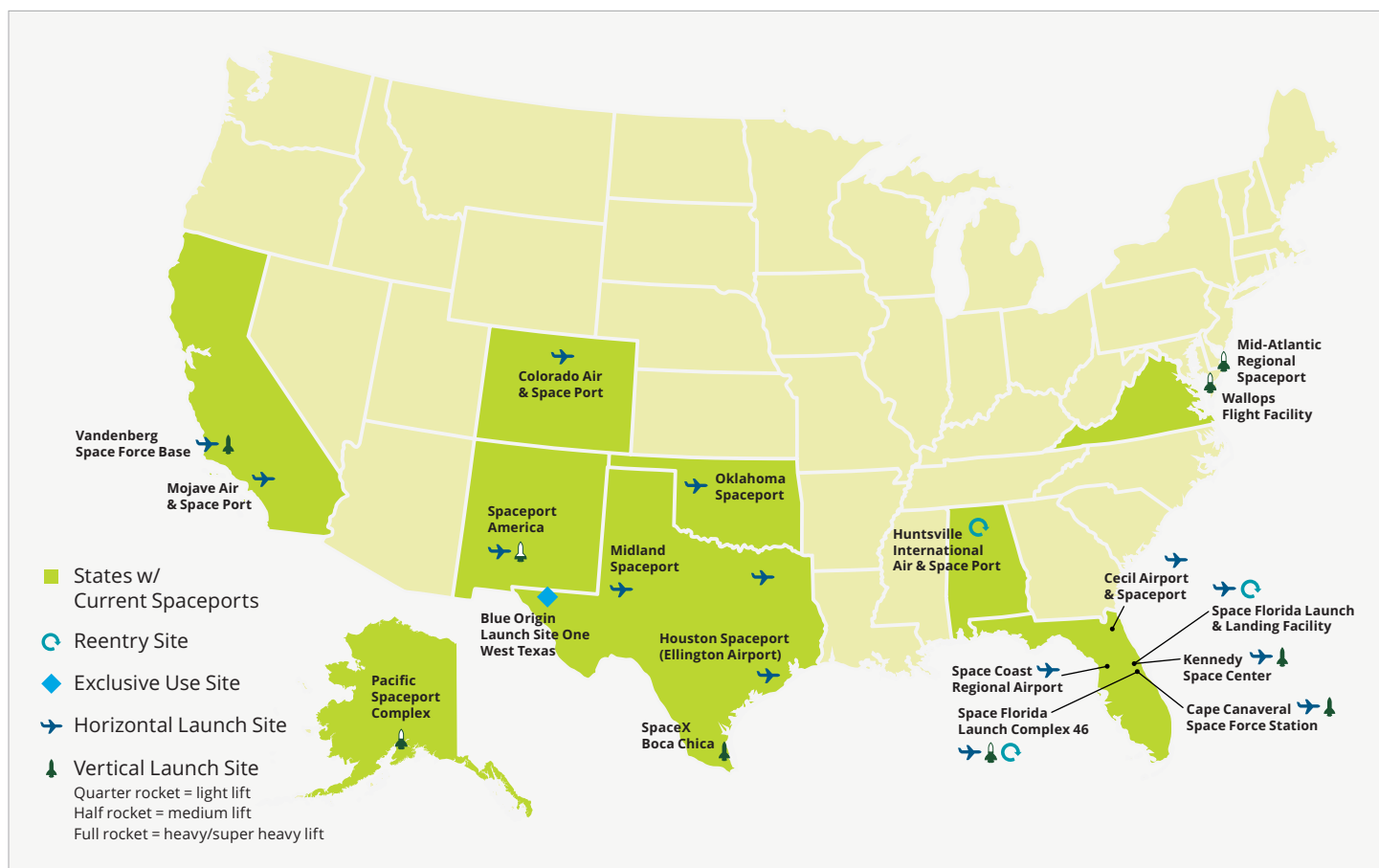
Special thanks to Camille Gardner and Brian Wilk for their contributions and the various spaceport organizations who provided inputs to this report.



Tour of US Spaceports

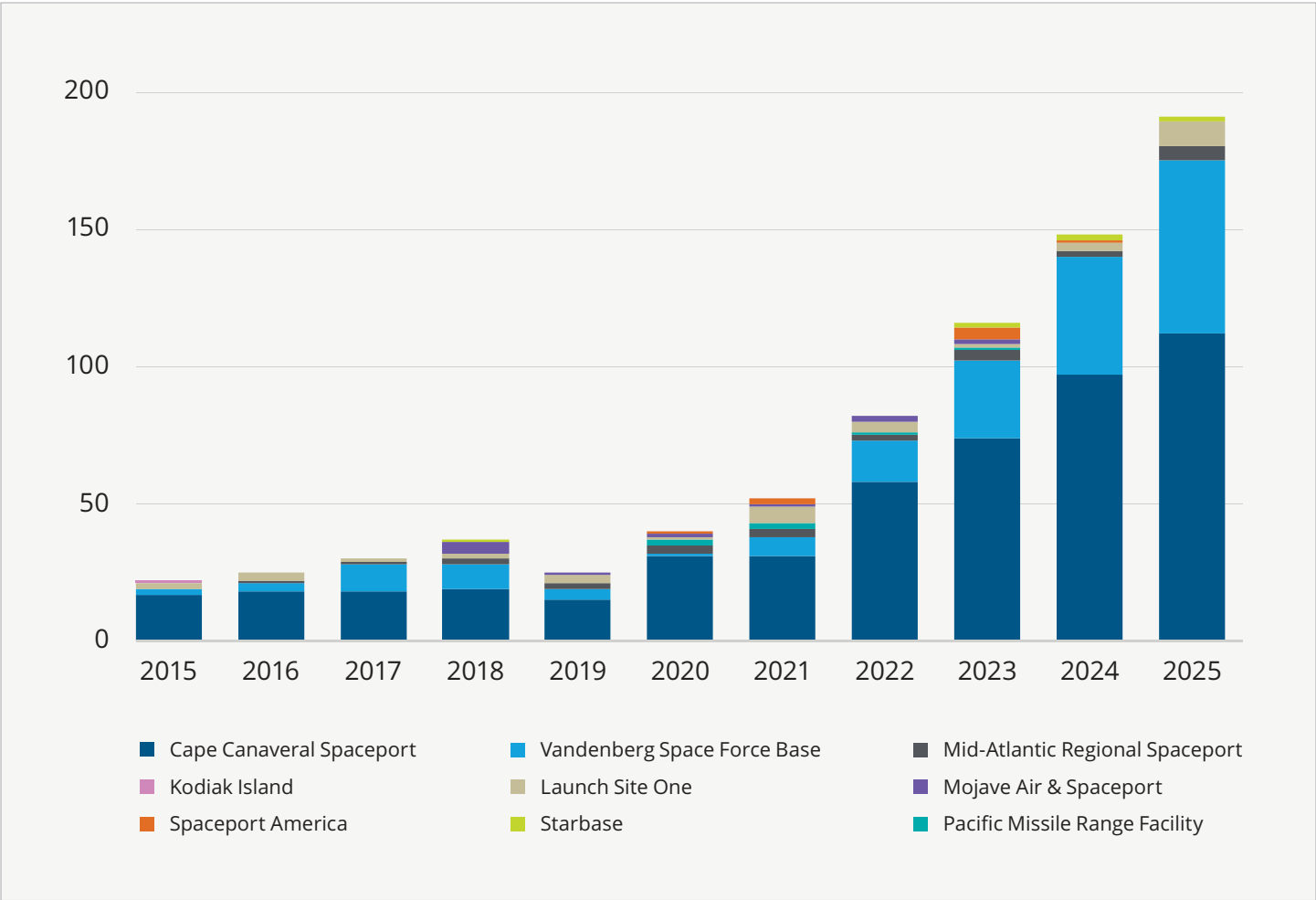
The following is a current-state tour of the US spaceport network. Highlighted below, are some of the spaceports in the US that demonstrate how different capabilities are maturing across the entire ecosystem. While these levels of maturity vary, understanding the current market landscape and where investments are being made can help provide a clearer understanding of where the US spaceport system is heading, as well as where gaps may still exist.

FIGURE 5 | **FAA LICENSED US SPACEPORTS & LAUNCH/REENTRY SITES***



*does not include FAA-licensed spaceport Camden, which was abandoned in 2022

FIGURE 6 | ORBITAL & SUBORBITAL LAUNCH ATTEMPTS FROM US SPACEPORTS⁵⁰



Source: Seradata by Slingshot Aerospace. Seradata data and analytics are provided by and © Slingshot Aerospace. See www.slingshot.space.

Sunset at Vandenberg
Randy Beaudoin, NASA



Our tour of the US Spaceport network begins with the two busiest spaceports in the world, CCS and VSFB. Supporting a collective 172 launches in 2025, over 50% of all launches in the world took place at one of these two spaceports, accounting for 75% of objects launched to space.⁵¹ Due to their history, existing infrastructure, and geographic locations, CCS and VSFB will likely continue to lead the world in space launch for the foreseeable future.

FIGURE 7
LAUNCH COMPLEX AVAILABILITY AT CAPE CANAVERAL SPACEPORT

Source: ESA, Modified Copernicus Sentinel data (2026), processed by ESA, CC BY-SA 3.0 IGO, Annotation by Deloitte^{52 53}

- Available
- Leased / Unavailable
- Inactive / Decommissioned





CCS at a Glance	
Established	Cape Canaveral launch range/base: operations began 1949 (then Joint Long Range Proving Ground / later Cape Canaveral Air Force Station; now CCSFS). KSC: established 1962 as NASA's primary human spaceflight launch center.
Primary Orbits Serviced	LEO, MEO, GEO, GTO, Lunar, and Interplanetary ⁵⁴
Vehicle Classes Supported	Vertical: Small, Medium, Heavy, Super Heavy ⁵⁵ Horizontal: Return
Launches in 2025	109 ⁵⁶
Current Launch Providers	Actively Launching: SpaceX, ULA, Blue Origin, NASA, Military (Hypersonic Weapons) Other Current Tenants: Relativity Space, Vaya Space, Phantom Space, Stoke Space
Capabilities & Features	Multi-pad, multi-operator spaceport with high-cadence range operations (Eastern Range), extensive tracking/telemetry/range safety, large-scale payload processing and integration infrastructure, and access to nearby marine/port logistics that support booster recovery and transport. The region is also being prepared to support much higher annual launch cadence (150–200/year) over time.

Background:

Cape Canaveral Spaceport, encompassing the NASA Kennedy Space Center (KSC) and Cape Canaveral Space Force Station (CCSFS), stands as the preeminent launch complex in the United States and a global leader in space operations. Its blend of historical legacy, strategic geographic advantages, and robust infrastructure has enabled it to support a diverse array of missions, from pioneering human spaceflight to the rapid expansion of commercial launch activity. CCS infrastructure extends beyond the launch pad, featuring multiple launch complexes, the Vehicle Assembly Building (VAB), mobile launch platforms, extensive payload processing facilities, support for expendable and reusable launch vehicles, and multi-modal connections to facilitate end-to-end transport.⁵⁷

In addition to supporting access to a wide-range of orbits, the site's east coast location provides launches with a natural "boost" due to the Earth's rotation.⁵⁸ The ability to accommodate wide-ranging vehicle and payload classes, from micro and medium-lift rockets to modern heavy and super-heavy systems, positions Cape Canaveral as one of the only spaceports globally able to facilitate every operational class of launch vehicle.⁵⁹ The Cape also supports booster recovery (both at land and via sea), and is home to the first FAA-issued Reentry Site Operator License (RSOL), the Launch and Landing Facility.⁶⁰

A unique dynamic of Cape Canaveral Spaceport is that it spans land managed by two separate federal entities, NASA at KSC, and the US Space Force at CCSFS. KSC, encompassing 144,000 acres, is home to two active launch complexes, as well as the VAB and Launch Control Center.^{61 62} CCSFS, on the other hand, is a 16,000 acre military installation operated by Space Launch Delta (SLD) 45, and is responsible for four active launch pads, two active landing pads, and more under development leased by additional commercial launch companies.^{63 64}

Outlook:

The rapid proliferation of commercial access to space has been a big driving factor in the evolution of the Cape Canaveral Spaceport. The spaceport's launch demand (seeing 109 launches in 2025) both sets the pace for the nation and begets spillover growth into the local economy from company investment.

Keeping up with this activity has required continuous investment and improvements into the spaceport's infrastructure portfolio. Through collaboration between the federal government, Space Florida and the Florida Department of Transportation (FDOT) at the state-level, and partnerships with commercial space companies, infrastructure modernization and improvement projects are continuous at CCS.⁶⁵ Florida's own spaceport improvement program has overseen \$3.81 billion in investment over the past 13 years alone, with nearly \$3.4 billion more expected in just the next five years.⁶⁶ Whether it be supporting new facilities (such as Blue Origin's Rocket Park⁶⁷ or SpaceX's Gigabay⁶⁸) or launchpads to support manufacturing and operations, or expanding capacity for "Big Six" infrastructure needs (wastewater, wetlands, wharfs, bridges, power, and gas), the Cape's ability to sustain investment for constant modernization efforts has been built upon 60+ years of experience, and is an important part of what makes Cape Canaveral Spaceport the leading launch location in the world by objects sent to orbit.⁶⁹ As CCS looks towards the next decade of activity, finding opportunities for a unified spaceport approach across KSC and CCSFS may be critical to efficient operations and improvements.



FIGURE 8
**LAUNCH COMPLEX
 AVAILABILITY AT VANDENBERG
 SPACE FORCE BASE**

Source: ESA, Modified Copernicus Sentinel data (2026), processed by ESA, CC BY-SA 3.0 IGO, Annotation by Deloitte^{70,71}

- Available
- Leased / Unavailable
- Inactive / Decommissioned





VSFB at a Glance	
Established	VSFB Launch/Range operations began in 1958 with the first missile launch of the Thor Intermediate Ballistic Missile. In 1959, the first two-stage Thor/Agena missile lifted the world's first polar orbiting satellite ⁷²
Primary Orbits Served	SSO, GEO, LEO, and Polar LEO ⁷³
Vehicle Classes Supported	Vertical: Small, Medium, Heavy ⁷⁴ Horizontal: Return
Launches in 2025	63 ⁷⁵
Current Launch Providers	Actively Launching: SpaceX, ULA, Firefly, Northrup Grumman Space Systems ^{76 77 78} Other Current Tenants: Long Wall; others TBD – RFI In Progress to solicit interest ⁷⁹
Capabilities & Features	Multi-pad vertical launch capabilities ranging from light lift to super heavy. Airfield suitable for horizontal launch and landing. Transportation modes include highways, rail, airfield, and boat dock. Instrumentation includes telemetry with fixed and mobile antenna, meteorological services, short and long-range optics, communications, area surveillance, command and control, and post-flight data.

Background:

Located along California's central coast between Los Angeles and San Francisco, VSFB is the preferred facility for launch requiring southern, polar, or sun-synchronous orbital trajectories.⁸⁰ VSFB's location makes such launch possible without overflying land until reaching Antarctica.⁸¹ Boasting over 99,000 acres, Vandenberg has four active Space Launch Complexes (SLC) for medium to heavy-lift rockets, in addition to a test pad (TP-01), and site 576-E for Long Wall's (formerly ABL Space Systems) RS1 program. Vandenberg also houses an airfield suitable for horizontal launch and landing and maintains active ranges for missile testing.⁸²

VSFB's active SLCs are utilized for orbital launch and conduct a mixture of commercial and government launches. SLC 2-W is used for Firefly's Alpha program, SLC 3-E is transitioning from launching United Launch Alliance's Atlas V rockets to its Vulcan Centaur Program.⁸³ SLC 4-E hosts SpaceX's Falcon 9 and Falcon Heavy launch programs, with SpaceX redeveloping SLC 6 for further Falcon 9 and Falcon Heavy launches in the future as well.⁸⁴ SLC 8 hosts Northrup Grumman Space Systems' Minotaur IV. There are several additional future proposed launch programs at VSFB as well. Blue Origin's New Glenn launch program has been proposed for a new greenfield space launch complex, SLC-9. Phantom Space Company has also proposed its Daytona-E and Laguna-E small lift launch programs at SLC-5.⁸⁵ SLC-11 is another greenfield site under consideration.⁸⁶

Outlook:

Vandenberg handles a diverse portfolio of commercial, DoW, and other Federal Government launches and is likely primed for development and infrastructure upgrades with space for spaceport development. VSFB has land available for development, though older SLCs have been unused for decades and require significant modernization. Many greenfield sites lack the electricity, water, and road infrastructure needed to scale capacity quickly; VSFB leadership is investing to address these constraints through the previously mentioned USSF's 'Spaceport of the Future' initiative.^{87 88 89} In terms of growth and attraction, USSF currently has an RFI out for new tenants for SLC-14 in an attempt to cultivate a more diversified provider base.⁹⁰

Other Operational Spaceports:

While CCS and VSFB continue to lead the way in the global spaceport network, they are not the only spaceports in the United States that currently service or have serviced launches in the past five years. In this set of stops on our tour, we cover a range of different spaceports, each unique and with its own set of capabilities. While these spaceports do not yet represent major spaceports in the same way CCS and VSFB do, each can bring compelling value propositions and have some level of experience with launch services.

MARS at a Glance	
Established	1995
Primary Orbits Served	Equatorial; ISS Resupply, LEO; Polar & SSO reachable by in-flight ma-neuver
Vehicle Classes Supported	Vertical: Small, Medium ⁹³
Launches in 2025	4 ⁹⁴
Current Launch Providers	Actively Launching: Rocket Lab Other Current Tenants: Northrop Grumman
Capabilities & Features	Multi-pad launch complex with four active pads plus key support infrastructure: payload processing, a UAS airfield, integration/control facility, an industrial AIT (assembly, integration, and testing) facility, a command building, a launch team maintenance facility, and logistics. Supportive of Vertical Launch, Suborbital Testbed, Co-located Industrial Hub. Seaport and Landing (In-Progress).

Background:

The Mid-Atlantic Regional Spaceport (MARS) is owned, operated and maintained by the Virginia Commercial Space Flight Authority (VCSFA), a political sub-division of the Commonwealth of Virginia, and has been in existence for more than 30 years. Located on Wallops Island, the spaceport includes land owned by VCSFA and land leased from NASA's Wallops Flight Facility (WFF). MARS is a commercial orbital and suborbital launch site that operates under an FAA Part 420 license for vertical lift to orbit. VCSFA has a Space Act Agreement with NASA to provide range support and other services to its customers. MARS provides multi-user launch infrastructure, East Coast access to trajectories that can support equatorial, ISS cargo, and sun-synchronous missions, and also augments and partially backs up East Coast launch operations at Cape Canaveral Spaceport.

While MARS operates at a lower launch cadence than CCS and VSF, the Commonwealth of Virginia has invested heavily in infrastructure over the past 20 years to strengthen VCSFA's role supporting assured access to space for national security launches from MARS and increase support for commercial, civil, and research and development launch operations. This investment has expanded MARS to four launch pads. Recent additions include Pad O-C (referred to by Rocket Lab as LC-2), which is used by Rocket Lab's Electron (first launched from MARS in January 2023) and Pad O-D (referred to by Rocket Lab as LC-3), opened in August 2025, which will be Rocket Lab's dedicated Neutron test and launch site. VCSFA is also upgrading MARS Pad O-A, developing it into a true multi-user launch pad that will accommodate new rockets.

In addition to its support from the Commonwealth, MARS is in close proximity to Maryland and Delaware—diversifying potential support from multiple Congressional delegations. Overall, VCSFA's development approach has integrated state and federal participation with co-investment from commercial tenants, using a multi-user "spaceport-as-infrastructure" model to support increased launch demand that is being directed to MARS as CCS and VSF operations are increasing. In doing so, VCSFA has created a framework for others to follow as spaceport developers look to grow within the US spaceport market.

Outlook:

Looking ahead, VCSFA has initiated further master planning and assessment efforts focused on infrastructure improvements, regional coordination with non-federal partners, and the use of undeveloped land near existing launch areas to support growth of the regional aerospace ecosystem; related assessments also point to potential future harbor and rail infrastructure needs.^{95 96 97 98} As VCSFA explores how to best use its geography and access to funding, key decisions should be made around supporting additional launch capacity (including heavier-class vehicles), and how to best navigate scaling from supporting a few launches a year to a more regular and higher cadence. VCSFA's success servicing the US small- and medium-lift launch market demonstrates that with the right mix of factors, there could be a viable business case for additional expansion at MARS and at other US spaceports to address a market need and provide benefits to the local economy.



Source: Google Maps, Annotation by Deloitte^{91 92}



Starbase at a Glance	
Established	2014
Primary Orbits Serviced	Current: Suborbital; Planned: LEO
Vehicle Classes Supported	Vertical: Super Heavy ¹⁰¹
Launches in 2025	5 (Suborbital Test Flights)
Current Launch Providers	SpaceX
Capabilities & Features	Integrated manufacturing, test, and multi-pad orbital-class launch complex designed around Starship/ Super Heavy scale operations. Transportation modes include highway and nearby port-enabled maritime logistics for oversized components and propellants, plus regional air access. Instrumentation and ground systems include high-capacity telemetry and tracking, communications, meteorological services, optical tracking, area surveillance, command and control/range coordination, and extensive test-stand and launch-site data systems to support iterative development and flight operations.

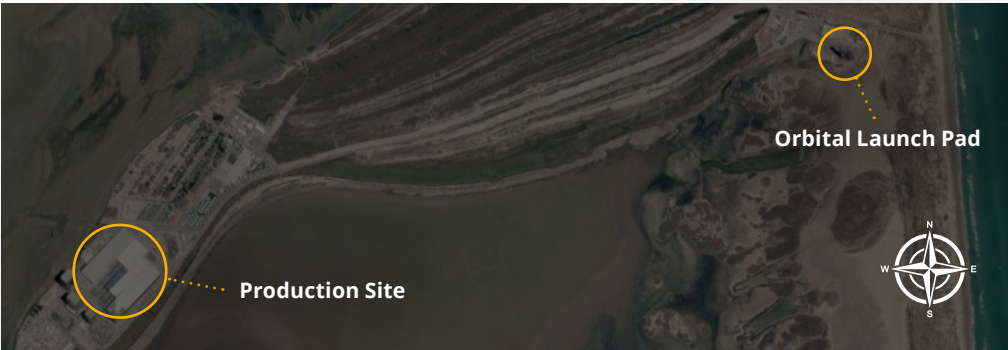
Background:

In recent years, perhaps no spaceport has captured more national attention than Starbase.¹⁰² Originally stood up in 2014, Starship differs from the other Spaceports covered thus far in that it is built by and for a single launch provider: SpaceX. Originally crafted as an alternative location for launch of Falcon-9 and Falcon-Heavy configurations, Starbase pivoted in 2018 to focus entirely on the development and testing of SpaceX's in-progress super heavy launch (SHL) vehicle, Starship.¹⁰³

Starbase's advantages are differentiated in the US spaceport market. Geographically, the Gulf Coast enables over-water corridors and favorable access for many low-inclination trajectories (with constraints), but the true moat is infrastructural: a purpose-built ecosystem of high-bay production, propulsion testing, tank farm/ground systems, integrated launch mount systems, and rapid-rework workflows, all co-located to support iterative flight test. In all, Starbase operates as the industrial heart of a super-heavy launch system whose scale (vehicle size, prop load, ground interfaces) pushes the boundaries of conventional spaceport design. Having supported five test flights in 2025 with more to come in 2026, Starbase could challenge other major spaceports position in the overall Spaceport market if Starship launches become a regular occurrence.

Outlook:

SpaceX's future plans for Starbase in Texas center on scaling from testing to high-cadence operations: the FAA's Final Tiered Environmental Assessment issued a Finding of No Significant Impact and cleared up to 25 Starship launches and 50 total landings per year at Boca Chica (with limited nighttime operations and remaining license elements still to be finalized).¹⁰⁴ Beyond test flights, previously announced plans for Starbase include operational Starship missions (including orbital rendezvous and in space propellant transfer demonstrations) at some point in the future.¹⁰⁵ Additionally, to enable parallel Florida launches while Cape manufacturing ramps, SpaceX also plans to ship Starship and Super Heavy horizontally by specialized sea barges from Starbase to Cape Canaveral,¹⁰⁶ with the first trial run of this voyage completed in late 2025.¹⁰⁷ If these combination of plans are all successful, Starbase could become a premier player in orbital launch that could eventually see itself as one of the major US spaceport installations.



Source: Google Maps, Annotation by Deloitte^{99 100}

- Available
- Leased / Unavailable
- Inactive / Decommissioned



Launch Site One at a Glance	
Established	2004
Primary Orbits Served	Suborbital ¹¹⁰
Vehicle Classes Supported	Vertical: Small ¹¹¹
Launches in 2025	9 (Suborbital Space Tourism)
Current Launch Providers	Blue Origin
Capabilities & Features	Single-site, purpose-built suborbital launch-and-recovery complex on private land, optimized for reusable operations. Transportation access is primarily highway (remote West Texas campus logistics) with on-site re-covery/ground handling. Instrumentation includes range safety and mission operations systems supporting suborbital profiles: telemetry, communications, tracking, meteorological monitoring, area surveillance, and post-flight data collection for rapid turnaround.

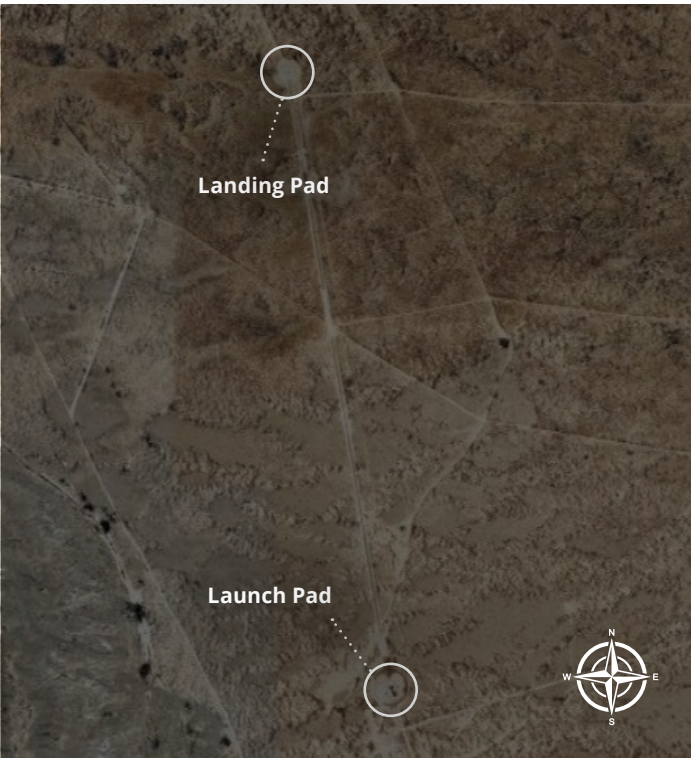
Background:

Created in 2004, Launch Site One (also known as Corn Ranch) was developed by Blue Origin to support suborbital reusable launch vehicle (RLV) operations, with the belief that suborbital RLV would best be matured on private land with controlled air/ground interfaces rather than at a federal range.¹¹² Developed primarily through private investment (Jeff Bezos’ land acquisition and Blue Origin capital), LSO’s first test flight took place in 2006 with Blue Origin’s Goddard vehicle. Over time, Blue Origin has developed additional vehicles, infrastructure, and operational concepts at LSO, which has hosted all of Blue Origin’s New Shepherd missions (focused on suborbital space tourism).

From a competitive standpoint, LSO’s advantages are fundamentally operational: a large, remote footprint for hazard-area control; predictable weather windows; and an integrated campus optimized for high-tempo suborbital flight, recovery, and rapid ground processing. Instead of relying on multi-tenant range economics, LSO’s value proposition centers on productizing suborbital, human-tended flights, payload research, and repeatable turnaround.

Outlook:

Looking ahead, LSO is entering a transition period. Blue Origin announced in January that New Shepherd flights would be undergoing a two-year pause as the company turns its focus to lunar missions.¹¹³ During this interval, Blue Origin could expand the site into a broader test-and-operations campus (e.g., increased R&D, propulsion and structures test capability), or, position Corn Ranch as a secondary orbital launch location to complement Cape Canaveral for New Glenn. The direction Blue Origin chooses should signal whether LSO remains primarily a suborbital asset or evolves into a cornerstone of its next phase of growth.



Source: Google Maps, Annotation by Deloitte^{108 109}

- Available
- Leased / Unavailable
- Inactive / Decommissioned

Spaceport America at a Glance	
Established	Spaceport America's first rocket launch occurred on September 25, 2006. The FAA's Office of Commercial Space Transportation issued the license to the Spaceport Authority for vertical and horizontal launches from the Spaceport in December 2008, and a groundbreaking ceremony took place on June 19, 2009. ¹¹⁶
Primary Orbits Served	Suborbital
Vehicle Classes Supported	Vertical: Small ¹¹⁷ Horizontal: Launch, Return
Launches in 2025	None; Last launch in 2024
Current Launch Providers	Actively Launching: None Other Current Tenants: Virgin Galactic, UP Aerospace, SpinLaunch, HAPS Mobile, AeroVironment, and Prismatic
Capabilities & Features	Horizontal and Vertical

Background:

Spaceport America, a FAA licensed complex located in southern New Mexico, is the world's first purpose-built commercial spaceport designed to support a wide spectrum of launch vehicle classes, including small-lift (less than 2,000 kg to LEO), medium-lift (2,000–20,000 kg), heavy-lift (20,000–50,000 kg), and is actively exploring upgrades to support super heavy-lift vehicles (greater than 50,000 kg to LEO).^{118 119} This spaceport spans approximately 18,000 acres featuring a 12,000-foot by 200-foot primary runway, capable of supporting sub-orbital horizontal takeoff and landing vehicles, and multiple vertical launch pads designed for a range of rocket classes.¹²⁰ Operationally, it benefits from ~6,000 square miles of restricted airspace and coordinates with the adjacent US Army White Sands Missile Range to support flexible range operations.¹²¹ The spaceport's layout is divided into three main operational areas: the Horizontal Launch Area (HLA), the Vertical Launch Area (VLA), and the Advanced Technology Area (ATA), each supporting distinct types of aerospace activities.¹²² Spaceport America currently accommodates 6 tenants including Virgin Galactic, UP Aerospace, SpinLaunch, HAPS Mobile, AeroVironment, and Prismatic. EXOS Aerospace and Swift Engineering commonly utilize the spaceport's services for testing and launches.¹²³ Spaceport America is also in the running as a possible landing location for the world's standalone winged commercial spaceplane, Sierra Space's Dream Chaser.¹²⁴



Source: Google Maps, Annotation by Deloitte^{114 115}

Outlook:

As the only inland US spaceport with dual FAA licensure for horizontal and vertical launches, Spaceport America's current strategic priorities center on attracting a broader range of commercial launch operators, fostering technological innovation through partnerships, and expanding infrastructure to support next-generation vehicles.^{125 126} The spaceport is actively reconfiguring and expanding its launch pad assignments to accommodate increased demand and new vehicle classes, including potential upgrades for super heavy-lift launches. Current launch pad allocations are divided between operational campaigns for established tenants and testing activities for emerging technologies, with approximately 1,500 acres available for further development.¹²⁷ Current priorities for Spaceport America commonly center on scaling repeatable suborbital operations while positioning for broader capabilities such as becoming the United States' first inland orbital launch facility and certification in reentry licensing.¹²⁸ Future enablement for orbital launch and reentry support (subject to vehicle partners, safety cases, range integration, and licensing) do not currently have a committed plan for implementation.¹²⁹

Infrastructure priorities through 2029 include improvements to facilities and services for current and future tenants. Planned improvements include the "Gateway to Space" terminal, new reception and technology centers, runway and taxiway upgrades, and expanded all-weather access roads to critical launch areas. Investment in a remote-controlled launch rail system for heavy payloads, drainage enhancement, and utility/capacity upgrades (power, water, waste management) is ongoing.¹³⁰



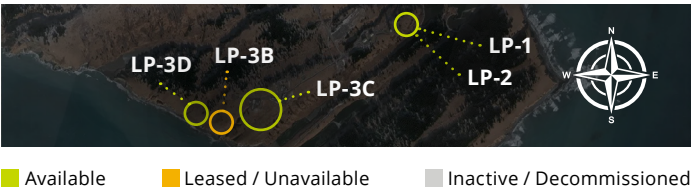
PSCA at a Glance	
Established	1998 ¹³³
Primary Orbits Served	High-inclination, Polar, Sun-synchronous, Orbital ¹³⁴
Vehicle Classes Supported	Vertical: Small, Medium ¹³⁵
Launches in 2025	1 ¹³⁶
Current Launch Providers	Not publicly available ^{137 138 139}
Capabilities & Features	Orbital vertical launch site for small/light-lift vertical rockets and stratospheric balloons, and the largest US launch azimuth range, enabling high-inclination, polar, and sun-synchronous missions (about 59°–110° inclination). The facility is equipped with two mission ops command-and-control systems, fixed/transportable range safety & tracking, fiber broadband, indoor vehicle processing/storage, PPF cleanrooms with hypergolic fueling, support for liquid/solid/hybrid rockets and balloons, suborbital and orbital scenarios, off-axis tracking, the RASL Innovation Center, and year-round launch.

Background:

The Pacific Spaceport Complex Alaska (PSCA), situated near Kodiak, Alaska, is a unique component of the US spaceport resiliency, offering access to polar and sun-synchronous orbits. PSCA occupies approximately 3,700 acres of state-owned land and currently supports small to medium-class launch vehicles with plans underway to expand its capabilities to accommodate heavier classes.¹⁴⁰ PSCA's strategic location and broad launch azimuth range make it a valuable asset for both government and commercial missions, particularly those requiring high-inclination trajectories. The site is managed by the Alaska Aerospace Corporation (AAC), which is actively pursuing increased launch frequency, enhanced national defense support, and expanded commercial access.

The PSCA was established to provide the United States with a dedicated commercial launch site outside of federal test ranges, with a particular focus on supporting missions to polar and high-inclination orbits. PSCA offers the widest launch azimuth range in the United States, from 110° to 220°, enabling direct access to polar (90°–100° inclination), sun-synchronous (97°–99° inclination), and high-inclination orbits (up to 110°).¹⁴¹ This capability is particularly valuable for missions such as Earth observation, reconnaissance, and certain scientific satellites. Its location on Kodiak Island offers open ocean to the south and southeast, enabling safe and efficient launch trajectories for a variety of orbital missions. The facility's development reflects broader trends in the US space sector, including the need to alleviate congestion at major federal launch sites and to support the growing demand for both national security and commercial satellite launches.

Source: Google Maps, Annotation by Deloitte^{131 132}



Outlook:

In 2025, PSCA made considerable investments in modernizing and scaling core launch-site infrastructure and operations, notably through upgrades to the payload processing capability (clean/controlled facilities to assemble and prepare spacecraft/payloads), broader spaceport facility improvements backed by federal funding, and actions to expand launch capacity. PSCA has also begun efforts towards digital/operational enablement in support of spaceport execution, strengthening its range safety, telemetry, and overall IT capabilities.

As US spaceport policy experiences increased emphasis on launch resiliency, PSCA could play a critical role in addressing national security objectives, particularly for missions that cannot be easily accommodated elsewhere. This could position Alaska as a strategic partner both within the commercial launch sector and for DoW initiatives seeking alternative launch sites in the case of natural disasters or wartime scenarios.

Key priorities for PSCA in the coming years are to accommodate the anticipated increase in tenants include raising its Federal Aviation Administration (FAA) licensed annual launch count (from 9 to 25) to convert backlog into revenue and supporting expanded capabilities for launches. These improvements, along with partnering with the University of Alaska Fairbanks (UAF) Geophysical Institute/Poker Flat Research Range to offer more integrated services (range + research + commercial needs), invite potential for increased launches in 2026.¹⁴³

Emerging Spaceports:

Following the lead of stalwarts and newcomers alike within the US spaceport market, more and more states are competing for opportunities to enter the marketplace, each bringing value props and focused bets on the role they can play. Below, we provide a snapshot of some of these emerging spaceports, and how decisionmakers are hoping to find a role in the expanding spaceport market.

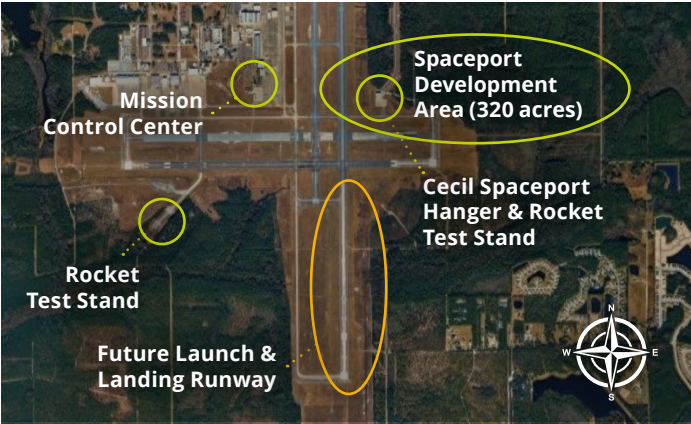


Cecil at a Glance	
Established	Spaceport licensed: initial Federal Aviation Administration (FAA) spaceport license in 2010 (first in Florida authorized for horizontal launch)
Primary Orbits Served	Suborbital
Vehicle Classes Supported	Horizontal: Reentry Application in Process
Launches in 2025	None
Current Launch Providers	Actively Launching: None Other Current Tenants: Hermeus
Capabilities & Features	Key features include a 12,500 foot runway suitable for large air-craft/horizontal ops. The FAA horizontal launch license (LSO 09-012) was renewed Jan 10, 2025 and runs to Jan 10, 2030. Cecil also has two common-use rocket test stands that are actively in use. In Aug 2025, the Jack-sonville Aviation Authority (JAA) board unanimously backed pursuing an FAA reentry license, including plans for a space vehicle facility to handle returned vehicles.

Background:

Cecil Airport & Spaceport’s origins trace back to the 1940s as a US Navy Master Jet Base, later transitioning to civilian and commercial use following its acquisition by the City of Jacksonville from the US Navy in 1999.¹⁴⁶ The Jacksonville Aviation Authority (JAA) has since overseen its transformation, investing over \$600 million in infrastructure improvements to attract aerospace industry tenants and support spaceport operations.¹⁴⁷ In 2010, Cecil became the first commercial spaceport on the East Coast to receive an FAA license for horizontal launch operations.¹⁴⁸ The site has since been designated a Space Territory by Space Florida, making it eligible for state funding and further solidifying its role in Florida’s aerospace strategy.¹⁴⁹

Since licensure, the site has been the beneficiary of substantial state and local grants. The JAA, Space Florida, and FDOT have collaborated to upgrade Cecil’s runways, construct a state-of-the-art common-use mission control center, expand hangar capacity, and develop site utilities that support both aviation and space operations.¹⁵⁰ Policy advances, exemplified by Florida’s Space Territory statute and FDOT’s inclusion of Cecil in its state quintimodal system, help foster sustained access to state investment and strategic planning.^{151 152}



Available Leased / Unavailable Inactive / Decommissioned

Outlook:

Currently, Cecil Airport & Spaceport serves as an emerging complementary facility within Florida’s spaceport network, specializing in horizontal launch operations, rocket testing, aerospace R&D, and supporting a diverse range of aviation and space-related activities.¹⁵³ This differentiation from the vertical launch focus of CCS allows Cecil to prime itself to serve niche markets, such as air-launched satellite deployment, rocket testing, suborbital research, space tourism, and emerging point-to-point space transportation concepts. Furthermore, spaceport diversification in Florida allows for capacity to accommodate both traditional vertical rocket launches at legacy sites as well as emerging commercial traffic via horizontal launch facilities, like Cecil and several federally-licensed regional airports.¹⁵⁴ This can create a more resilient and flexible launch system that appeals to a broader spectrum of commercial operators, government missions, and research institutions.

Cecil is making strides towards space operationalization. Notably, hypersonic flight company Hermeus selected Cecil in 2024 to be the site of its hypersonic engine test facility, an indicator of full hypersonic capability to come.¹⁵⁵ Additionally, the JAA Board voted unanimously in August of 2025 to support efforts for Cecil to obtain a reentry license from the FAA, which, when granted, could unlock a multitude of applications from reusable launch to point-to-point transport.¹⁵⁶ The resolution also supported development of a “space vehicle facility” at Cecil.¹⁵⁷ Cecil Airport and Spaceport anticipates officially kicking off re-entry license application efforts in Mid-May 2026, to include operational plans and safety analysis for reentry.^{158 159} Commercial interest has been demonstrated in this endeavor, with companies like Intuitive Machines, Mayo Clinic and Redwire expressing interest in biomedical research applications that could be unlocked via return authorization.¹⁶⁰ While what use cases will stick remains to be seen, Cecil is an example of how emerging spaceports can capitalize on the new space economy to play a complementary role.

Source: Google Maps, Annotation by Deloitte^{144 145}

OASP at a Glance	
Established	2006
Primary Orbits Served	Suborbital
Vehicle Classes Supported	Horizontal: Launch, Return
Launches in 2025	None
Current Launch Providers	Actively Launching: None Other Current Tenants: Dawn Aerospace
Capabilities & Features	Key features include onsite infrastructure/facilities for aerospace testing, R&D, flight, and launch. The only US spaceport with a spaceflight corri-dor outside restricted airspace or military operation areas (MOAs).

Background:

The Oklahoma Legislature created the Oklahoma Space Industry Development Authority (OSIDA) in 1999 to plan, develop, and promote a spaceport and related industries, leveraging the site’s extraordinary runway and acreage; OSIDA began operating the Oklahoma Air & Space Port and Industrial Park in 2006, and the FAA issued a Launch Site Operator License that same year following an environmental assessment and a Finding of No Significant Impact. In 2021 the license was renewed for five years (through June 12, 2026), and in 2025 OSIDA was consolidated under the Oklahoma Department of Aerospace and Aeronautics (ODAA) to tighten governance and accelerate growth. With a 13,503 by 300 foot all weather runway (15,503 feet including overruns) and an adjacent ~1,100 acre industrial park, Burns Flat mirrors successful “airport plus test range” redevelopments seen across aerospace clusters, reducing greenfield risk for horizontal launch and suborbital test concepts while keeping industrial utilities, hangars, and ramp space on tap.

Burns Flat offers a differentiated inland proposition: an FAA approved “Infinity One” spaceflight corridor of roughly 152 miles by 45–50 miles that operates outside restricted military airspace/ MOAs and supports northwest (polar) trajectories. This corridor, coupled with very long runway operations and sparse surrounding airspace, makes the site attractive for suborbital RLVs and horizontal spaceplanes needing repeatable, responsive access without coastal bottlenecks. As demonstrated in its Victus series (e.g., sub 48 hour order to launch timelines) and its “Spaceport of the Future” infrastructure push, the DoW is explicitly pursuing distributed, resilient launch capacity (including inland options) to add redundancy, enable discreet and varied schedules, and support the US Space Force’s tactically responsive space (TRS) objectives. Given this set of efforts, inland spaceports like Oklahoma could eventually represent a resilient, complementary asset to coastal spaceports ranges.

Outlook:

While Oklahoma’s role in inland launch resilience remains to be seen, Burns Flat’s focus areas include maintaining an active FAA Launch Site Operator License, establishing and expanding OSIDA’s role in space operations, and standing up a repeatable suborbital service in partnership with Dawn Aerospace.¹⁶⁴ In 2025, OSIDA and Dawn announced a ~\$17 million agreement to base the Mk II Aurora (a rocket powered, remotely piloted, runway launched suborbital spaceplane) at the Oklahoma Air & Space Port, with initial flight operations targeted for 2027. The Mk II is designed for multiple flights per day, carrying up to ~5 kg payloads to ~100 km for microgravity research, with an initial tranche of up to 100 missions is earmarked for Oklahoma researchers.¹⁶⁵ ¹⁶⁶ In support of this agreement, the state has funded design work for a dedicated spaceplane hangar to support operations. Paired with the site’s 13,503 by 300 foot runway, extensive ramp/hangar capacity, and an FAA approved horizontal launch corridor, Dawn’s program can provide Oklahoma with a concrete path to convert licensing and infrastructure into cadence, establishing an inland node for responsive suborbital science, training, and defense relevant experimentation.



Source: Google Maps, Annotation by Deloitte¹⁶¹ ¹⁶²

- Available
- Leased / Unavailable
- Inactive / Decommissioned



Huntsville at a Glance	
Established	Spaceport licensed: Licensed in 2022 by FAA as a reentry operator ¹⁶⁹
Primary Orbits Served	N/A – reentry only
Vehicle Classes Supported	N/A – reentry only
Launches in 2025	N/A – reentry only
Current Launch Providers	Sierra Space
Capabilities & Features	Key features include a 10,000-foot horizontal landing, orbital reentry site. The FAA orbital reentry license (RSO 22-001) expires on May 13, 2027.

Background:

Huntsville’s spaceport license was established in May of 2022, when the airport received an FAA Reentry Site Operator License, making it the first commercial service airport in the United States authorized to accept landings from commercial spacecraft.^{170 171} Embedded within Huntsville International Airport, Huntsville’s spaceport is positioned for runway recovery, payload return, and post-landing logistics. This gives the spaceport a place in the market as commercial space activity expands beyond launch into end-to-end in-space manufacturing and Earth-return supply chains.

A key element of Huntsville’s value lies in the strength of the surrounding innovation ecosystem. The region is supported with deep aerospace heritage through NASA’s Marshall Space Flight Center (MSFC) and Redstone Arsenal. In addition Huntsville is home to an important life sciences and advanced manufacturing base anchored by the HudsonAlpha Institute for Biotechnology, as well as pharmaceutical companies like Eli Lilly, who recently announced an investment of more than \$6 billion in a new Huntsville manufacturing facility, the largest industrial private investment in Alabama history.^{172 173} Through this unique set of cutting-edge organizations, Huntsville has credibility as the intersection of space, biotechnology, defense, and industrial engineering.^{174 175}

Additionally, Huntsville has access to nation-wide distribution networks through air, road, and rail, all of which lends itself well to being a location for a reentry-centered model, which requires more than just a runway.¹⁷⁶ Reentry depends on specialized engineering talent, secure recovery and handling, technical infrastructure, research partnerships, and regulated manufacturing capabilities that can absorb high-value materials immediately after landing, along with emerging distribution and logistics networks to move space-made products to end-users.^{177 178 179 180 181}

Outlook:

As Huntsville International Air and Spaceport looks ahead, much of its role in the US spaceport system hinges upon the success of Sierra Space and the Dream Chaser vehicle. As the anchor tenant through which Huntsville maintains FAA permission for reentry, Sierra Space’s Dream Chaser will likely enable gentler recovery and tighter chain-of-custody for sensitive payloads than splashdown-based return architectures.^{182 183} Through this partnership, as well as a strategy that takes advantage of its local ecosystem, Huntsville appears to be building toward being an initial leader in a specialized reentry market anchored by aerospace credibility, biopharma adjacency, and logistics capability. While the reentry market is still early in its maturity curve, the Port of Huntsville has made decisions on how to position itself to be an important player as commercial reentry becomes more viable and in-demand.



Source: Google Maps, Annotation by Deloitte^{167 168}

Additional Spaceports

- Colorado Air & Space Port (CASP) – Watkins, Colorado (FAA license est. 2018; Horizontal)
- Houston Spaceport – Houston, Texas (FAA license est. 2021; Horizontal)
- Midland Spaceport – Midland, Texas (FAA license est. 2024; Horizontal)
- Montana (Exploratory)
- Sierra Vista
- Space Coast Regional Airport – Titusville, Florida (FAA license est. 2020; Horizontal)
- Utah (Exploratory)
- Yuma, Arizona (In-progress)

NASA's SLS Rocket and Orion
Spacecraft Rollout to Launch Pad 39B

Sam Lott, NASA



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- 74 Classification: UNCLASSIFIED | Source Type: Academic Article | Title: Optimization of the Conceptual Design of a Multistage Rocket Launcher | Date of Publication: 05/01/2022 | URL: https://www.researchgate.net/figure/Classification-of-launch-vehicles-according-to-its-mass_tbl1_360856653 |

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- Date of Access: 03/16/2026 | Platform/Service name: ResearchGate.net | Author: Orgeira, Pedro & Rey, Guillermo & Ulloa, Carlos & García Luis, Uxía & Rouco, Pablo & Aguado-Agelet, Fernando
- 75 Classification: UNCLASSIFIED | Source Type: Commercial Database Content | Title: Seradata Query: Launches from 1-1-2025 to 12-31-2025 | Date of Access: 02/17/2026 | Platform/Service name: Seradata | Source Descriptor: Deloitte Analysis on Seradata launch data for US-based launches occurring in the calendar year 2025
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- 77 Classification: UNCLASSIFIED | Source Type: Publicly Available Information | Title: CD-0010-22 | Date of Publication: 12/15/2023 | URL: <https://documents.coastal.ca.gov/reports/2023/12/F8b/F8b-12-2023-exhibits.pdf> | Date of Access: 03/16/2026 | Platform/Service name: ca.gov | Author: CALIFORNIA COASTAL COMMISSION
- 78 Classification: UNCLASSIFIED | Source Type: Publicly Available Information | Title: Dept. of the Air Force opens bidding for Space Launch Complex 14 at Vandenberg SFB | Date of Publication: 01/06/2026 | URL: <https://spaceflightnow.com/2026/01/06/dept-of-the-air-force-opens-bidding-for-space-launch-complex-14-at-vandenberg-sfb> | Date of Access: 03/20/2026 | Platform/Service name: SpaceflightNow.com | Author: Will Robinson-Smith
- 79 Classification: UNCLASSIFIED | Source Type: Publicly Available Information | Title: Space Force requests launch provider interest in Cape and Vandenberg pads | Date of Publication: 01/04/2026 | URL: <https://www.nasaspaceflight.com/2026/01/space-force-launch-interest-cape-vandenberg-pads> | Date of Access: 03/20/2026 | Platform/Service name: nasaspaceflight.com | Author: Alejandro Alcantarilla Romera and Chris Bergin
- 80 Classification: UNCLASSIFIED | Source Type: Publicly Available Information | Title: Vandenberg SFB Overview | URL: <https://rocketlaunch.org/rocket-launch-sites/vandenberg-sfb> | Date of Access: 03/20/2026 | Platform/Service name: RocketLaunch.org
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- 83 Classification: UNCLASSIFIED | Source Type: Publicly Available Information | Title: ULA offloads first Vulcan rocket at Vandenberg as it preps its next Cape launch | Date of Publication: 02/06/2026 | URL: <https://spaceflightnow.com/2026/02/06/ula-offloads-first-vulcan-rocket-at-vandenberg-at-it-preps-its-next-cape-launch> | Date of Access: 03/20/2026 | Platform/Service name: SpaceflightNow.com | Author: Will Robinson-Smith
- 84 Classification: UNCLASSIFIED | Source Type: Publicly Available Information | Title: SpaceX's SLC-6 redevelopment green light | Date of Publication: 10/19/2025 | URL: <https://www.nasaspaceflight.com/2025/10/spacex-slc-6-redevelopment-green-light> | Date of Access: 03/22/2026 | Platform/Service name: nasaspaceflight.com | Author: Chris Bergin
- 85 Classification: UNCLASSIFIED | Source Type: Publicly Available Information | Title: CD-0010-22 | Date of Publication: 12/15/2023 | URL: <https://documents.coastal.ca.gov/reports/2023/12/F8b/F8b-12-2023-exhibits.pdf> | Date of Access: 03/22/2026 | Platform/Service name: ca.gov | Author: CALIFORNIA COASTAL COMMISSION
- 86 Classification: UNCLASSIFIED | Source Type: Government Report | Title: TAKING MARINE MAMMALS INCIDENTAL TO SPACE VEHICLE AND MISSILE LAUNCHES AND AIRCRAFT TEST FLIGHT AND HELICOPTER OPERATIONS AT VANDENBERG AIR FORCE BASE, CALIFORNIA | Date of Publication: 02/16/2022 | URL: <https://www.fisheries.noaa.gov/s3/2024-01/Vandenberg-2019LOA-MonRep2021-OPR1.pdf> | Date of Access: 03/22/2026 | Platform/Service name: fisheries.noaa.gov | Author: United States Space Force
- 87 Classification: UNCLASSIFIED | Source Type: Blog | Title: The Challenges of Building a New Spaceport | URL: <https://newspaceconomy.ca/2023/04/01/the-challenges-of-building-a-new-spaceport> | Date of Access: 05/28/2026 | Platform/Service name: newspaceconomy.ca
- 88 Classification: UNCLASSIFIED | Source Type: Blog | Title: How Vandenberg's Range Is Scaling to Meet Launch Demand | Date of Publication: 04/10/2026 | URL: <https://www.airandspaceforces.com/vandenberg-range-scaling-to-meet-launch-demand/> | Date of Access: 05/28/2026 | Platform/Service name: airandspaceforces.com | Author: Courtney Albon
- 89 Classification: UNCLASSIFIED | Source Type: Government Report | Title: Vandenberg SFB announces new strategic plan | Date of Publication: 01/23/2026 | URL: <https://www.spaceforce.mil/News/Article-Display/Article/4390373/vandenberg-sfb-announces-new-strategic-plan> | Date of Access: 05/28/2026 | Platform/Service name: spaceforce.mil | Author: Sgt. Joshua LeRoi
- 90 Classification: UNCLASSIFIED | Source Type: Publicly Available Information | Title: Space Force requests launch provider interest in Cape and Vandenberg pads | Date of Publication: 01/04/2026 | URL: <https://www.nasaspaceflight.com/2026/01/space-force-launch-interest-cape-vandenberg-pads/> | Date of Access: 03/22/2026 | Platform/Service name: nasaspaceflight.com | Author: Alejandro Alcantarilla Romera and Chris Bergin
- 91 Classification: UNCLASSIFIED | Source Type: Photos | Title: MARS Spaceport | URL: maps.google.com | Date of Access: 05/15/2026 | Platform/Service name: Google Maps | Source Descriptor: Aerial image of MARS
- 92 Classification: UNCLASSIFIED | Source Type: Individual Analysis Citation | Title: Deloitte Analysis of Pad Allocation and Key Locations | Author: Deloitte | Source Descriptor: Mapping of leased, available, and unavailable pads/parcels at Mid-Atlantic Regional Spaceport based on publicly available data, conference brochures, and confirmation with individual spaceport, where applicable.
- 93 Classification: UNCLASSIFIED | Source Type: Academic Article | Title: Optimization of the Conceptual Design of a Multistage Rocket Launcher | Date of Publication: 05/01/2022 | URL: https://www.researchgate.net/figure/Classification-of-launch-vehicles-according-to-its-mass_tbl1_360856653 | Date of Access: 03/22/2026 | Platform/Service name: ResearchGate.net | Author: Orgeira, Pedro & Rey, Guillermo & Ulloa, Carlos & García Luis, Uxía & Rouco, Pablo & Aguado-Agelet, Fernando
- 94 Classification: UNCLASSIFIED | Source Type: Commercial Database Content | Title: Seradata Query: Launches from 1-1-2025 to 12-31-2025 | Date of Access: 02/17/2026 | Platform/Service name: Seradata | Source Descriptor: Deloitte Analysis on Seradata launch data for US-based launches occurring in the calendar year 2025
- 95 Classification: UNCLASSIFIED | Source Type: Publicly Available Information | Title: A New Space Age at Vandenberg SFB | URL: <https://reachcentralcoast.org/vandenberg> | Date of Access: 05/28/2026 | Platform/Service name: reachcentralcoast.org
- 96 Classification: UNCLASSIFIED | Source Type: Publicly Available Information | Title: Vision for Vandenberg Involves Growth in Activity | Date of Publication: 01/12/2025 | URL: <https://www.noozhawk.com/vision-for-vandenberg-involves-growth-in-activity> | Date of Access: 05/28/2026 | Platform/Service name: noozhawk.com | Author: Janene Scully
- 97 Classification: UNCLASSIFIED | Source Type: Blog | Title: Vandenberg Explores More Launch Pads, Including One for Super Heavy Rockets | Date of Publication: 01/05/2026 | URL: <https://www.airandspaceforces.com/vandenberg-launch-pads-super-heavy-expansion> | Date of Access: 05/28/2026 | Platform/Service name: airandspaceforces.com | Author: Courtney Albon
- 98 Classification: UNCLASSIFIED | Source Type: Government Report | Title: Building a Thriving Space Enterprise at Vandenberg AFB | Date of Publication: 08/01/2020 | URL: <https://business.ca.gov/wp-content/uploads/2020/08/Master-Development-Plan-for-VAFB-Fact-Sheet.pdf> | Date of Access: 05/28/2026 | Platform/Service name: business.ca.gov

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- 100 Classification: UNCLASSIFIED | Source Type: Individual Analysis Citation | Title: Deloitte Analysis of Pad Allocation and Key Locations | Author: Deloitte | Source Descriptor: Mapping of leased, available, and unavailable pads/parcels at SpaceX Starbase based on publicly available data, conference brochures, and confirmation with individual spaceport, where applicable.
- 101 Classification: UNCLASSIFIED | Source Type: Academic Article | Title: Optimization of the Conceptual Design of a Multistage Rocket Launcher | Date of Publication: 05/01/2022 | URL: https://www.researchgate.net/figure/Classification-of-launch-vehicles-according-to-its-mass_tbl1_360856653 | Date of Access: 03/22/2026 | Platform/Service name: ResearchGate.net | Author: Orgeira, Pedro & Rey, Guillermo & Ulloa, Carlos & García Luis, Uxía & Rouco, Pablo & Aguado-Agelet, Fernando
- 102 Classification: UNCLASSIFIED | Source Type: Publicly Available Information | Title: Starbase Overview | URL: <https://rocketlaunch.org/rocket-launch-sites/starbase-boca-chica> | Date of Access: 03/22/2026 | Platform/Service name: RocketLaunch.org
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- 105 Classification: UNCLASSIFIED | Source Type: Publicly Available Information | Title: To the Moon and Beyond | Date of Publication: 10/30/2025 | URL: <https://www.spacex.com/updates#moon-and-beyond> | Date of Access: 03/22/2026 | Platform/Service name: SpaceX.com
- 106 Classification: UNCLASSIFIED | Source Type: Blog | Title: ELON MUSK TEASES MASSIVE WATERSHIP TO CARRY SPACEX STARSHIPS INTO FLORIDA | Date of Publication: 09/26/2025 | URL: <https://www.slashgear.com/1979010/elon-musk-spacex-cape-canaveral-starship-transport/> | Date of Access: 03/22/2026 | Platform/Service name: SlashGear.com | Author: Jack Picone
- 107 Classification: UNCLASSIFIED | Source Type: Blog | Title: Starship Barge identified ahead of Starbase to KSC transports | Date of Publication: 01/01/2026 | URL: <https://www.nasaspacelflight.com/2026/01/starship-barge-ksc-transports> | Date of Access: 03/25/2026 | Platform/Service name: nasaspacelflight.com | Author: Chris Bergin
- 108 Classification: UNCLASSIFIED | Source Type: Photos | Title: Launch Site One | URL: maps.google.com | Date of Access: 05/15/2026 | Platform/Service name: Google Maps | Source Descriptor: Aerial image of Launch Site One
- 109 Classification: UNCLASSIFIED | Source Type: Individual Analysis Citation | Title: Deloitte Analysis of Pad Allocation and Key Locations | Author: Deloitte | Source Descriptor: Mapping of leased, available, and unavailable pads/parcels at Launch Site One based on publicly available data, conference brochures, and confirmation with individual spaceport, where applicable.
- 110 Classification: UNCLASSIFIED | Source Type: Commercial Database Content | Title: Seradata Query: Launches from 1-1-2025 to 12-31-2025 | Date of Access: 02/17/2026 | Platform/Service name: Seradata
- 111 Classification: UNCLASSIFIED | Source Type: Academic Article | Title: Optimization of the Conceptual Design of a Multistage Rocket Launcher | Date of Publication: 05/01/2022 | URL: https://www.researchgate.net/figure/Classification-of-launch-vehicles-according-to-its-mass_tbl1_360856653 | Date of Access: 03/25/2026 | Platform/Service name: ResearchGate.net | Author: Orgeira, Pedro & Rey, Guillermo & Ulloa, Carlos & García Luis, Uxía & Rouco, Pablo & Aguado-Agelet, Fernando
- 112 Classification: UNCLASSIFIED | Source Type: Blog | Title: How Jeff Bezos turned Van Horn, Texas into space tourism hub | Date of Publication: 04/14/2025 | URL: <https://www.chron.com/news/space/article/blue-origin-bezos-van-horn-20274834.php> | Date of Access: 03/25/2026 | Platform/Service name: chron.com | Author: Timothy Malcolm
- 113 Classification: UNCLASSIFIED | Source Type: Publicly Available Information | Title: Blue Origin to Pause New Shepard Flights for No Less Than Two Years | Date of Publication: 01/30/2026 | URL: <https://www.blueorigin.com/news/new-shepard-to-pause-flights> | Date of Access: 03/25/2026 | Platform/Service name: Blueorigin.com
- 114 Classification: UNCLASSIFIED | Source Type: Photos | Title: Spaceport America | URL: maps.google.com | Date of Access: 05/15/2026 | Platform/Service name: Google Maps | Source Descriptor: Aerial image of Spaceport America
- 115 Classification: UNCLASSIFIED | Source Type: Individual Analysis Citation | Title: Deloitte Analysis of Pad Allocation and Key Locations | Date of Access: 03/25/2026 | Author: Deloitte | Source Descriptor: Mapping of leased, available, and unavailable pads/parcels at Spaceport America based on publicly available data, conference brochures, and confirmation with individual spaceport, where applicable.
- 116 Classification: UNCLASSIFIED | Source Type: Publicly Available Information | Title: SPACEPORT AMERICA FACTS | Date of Publication: 07/01/2021 | URL: <https://www.spaceportamerica.com/wp-content/uploads/2021/07/Press-Kit-Updated-072021.pdf> | Date of Access: 03/25/2026 | Platform/Service name: Spaceportamerica.com | Author: Alice Carruth
- 117 Classification: UNCLASSIFIED | Source Type: Academic Article | Title: Optimization of the Conceptual Design of a Multistage Rocket Launcher | Date of Publication: 05/01/2022 | URL: https://www.researchgate.net/figure/Classification-of-launch-vehicles-according-to-its-mass_tbl1_360856653 | Date of Access: 03/25/2026 | Platform/Service name: ResearchGate.net | Author: Orgeira, Pedro & Rey, Guillermo & Ulloa, Carlos & García Luis, Uxía & Rouco, Pablo & Aguado-Agelet, Fernando
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- 119 Classification: UNCLASSIFIED | Source Type: Blog | Title: Spaceport America: The World's First Commercial Spaceport | Date of Publication: 09/22/2011 | URL: <https://www.industryleadersmagazine.com/spaceport-america> | Date of Access: 03/25/2026 | Platform/Service name: industryleadersmagazine.com | Author: Aubrey Chang
- 120 Classification: UNCLASSIFIED | Source Type: Government Report | Title: Update on Spaceport America | Date of Publication: 10/23/2023 | Page(s): 28 | URL: https://www.nmlegis.gov/handouts/TIRS_102323_Item_7_McLaughlin_SpA_TIRS.pdf | Date of Access: 03/25/2026 | Platform/Service name: nmlegis.gov | Author: Scott McLaughlin
- 121 Classification: UNCLASSIFIED | Source Type: Publicly Available Information | Title: About Spaceport America | URL: <https://www.spaceportamerica.com/about/> | Date of Access: 03/25/2026 | Platform/Service name: spaceportamerica.com
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- 123 Classification: UNCLASSIFIED | Source Type: Publicly Available Information | Title: TENANTS, CUSTOMERS AND PARTNERS | URL: <https://www.spaceportamerica.com/business/customers> | Date of Access: 03/25/2026 | Platform/Service name: Spaceportamerica.com
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- 125 Classification: UNCLASSIFIED | Source Type: Publicly Available Information | Title: Spaceport America looks forward to more flights, continuing momentum | Date of Publication: 01/29/2026 | URL: <https://global.factiva.com/en/du/article.asp?accountid=None&accessionno=NMB-WK00020260129em1t0008d> | Date of Access: 03/25/2026 | Platform/Service name: global.factiva.com | Author: Matthew Reichbach
- 126 Classification: UNCLASSIFIED | Source Type: Videos | Title: Aerial Tour of Spaceport America 2022 | Date of Publication: 03/22/2022 | URL: <https://www.youtube.com/watch?v=8PNsA1f14A> | Date of Access: 03/25/2026 | Platform/Service name: youtube.com
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- 130 Classification: UNCLASSIFIED | Source Type: Government Report | Title: Spaceports by State | Date of Publication: 12/10/2025 | URL: https://www.faa.gov/space/spaceports_by_state#fl_ccs | Date of Access: 03/25/2026 | Platform/Service name: faa.gov
- 131 Classification: UNCLASSIFIED | Source Type: Photos | Title: PSCA | URL: maps.google.com | Date of Access: 05/15/2026 | Platform/Service name: Google Maps | Source Descriptor: Aerial image of PSCA
- 132 Classification: UNCLASSIFIED | Source Type: Individual Analysis Citation | Title: Deloitte Analysis of Pad Allocation and Key Locations | Date of Access: 05/15/2026 | Author: Deloitte | Source Descriptor: Mapping of leased, available, and unavailable pads/parcels at PSCA based on publicly available data, conference brochures, and confirmation with individual spaceport, where applicable.
- 133 Classification: UNCLASSIFIED | Source Type: Government Report | Title: FROM THE LAST FRONTIER TO THE FINAL FRONTIER | Date of Publication: 01/01/2024 | URL: <https://www.faa.gov/media/77916> | Date of Access: 04/01/2026 | Platform/Service name: faa.gov
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- 138 Classification: UNCLASSIFIED | Source Type: Publicly Available Information | Title: Pacific Spaceport Complex – Alaska Spaceport Master Plan 2020 - 2030 | Date of Publication: 06/01/2021 | URL: <https://akaerospace.com/wp-content/uploads/2021/06/PSCA-Master-Plan-Final-Board-Approved-March2021.pdf> | Date of Access: 04/01/2026 | Platform/Service name: akaerospace.com | Author: Alaska Aerospace Corporation
- 139 Classification: UNCLASSIFIED | Source Type: Government Report | Title: FROM THE LAST FRONTIER TO THE FINAL FRONTIER | Date of Publication: 01/01/2024 | URL: <https://www.faa.gov/media/77916> | Date of Access: 04/01/2026 | Platform/Service name: faa.gov
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- 144 Classification: UNCLASSIFIED | Source Type: Photos | Title: Cecil Airport and Spaceport | URL: maps.google.com | Date of Access: 05/15/2026 | Platform/Service name: Google Maps | Source Descriptor: Aerial image of Cecil Airport and Spaceport
- 145 Classification: UNCLASSIFIED | Source Type: Individual Analysis Citation | Title: Deloitte Analysis of Pad Allocation and Key Locations | Date of Access: 05/15/2026 | Author: Deloitte | Source Descriptor: Mapping of leased, available, and unavailable pads/parcels at Cecil Airport and Spaceport based on publicly available data, conference brochures, and confirmation with individual spaceport, where applicable.
- 146 Classification: UNCLASSIFIED | Source Type: Publicly Available Information | Title: Cecil Airport History | URL: <https://www.flyjacksonville.com/jaa/content.aspx?id=527> | Date of Access: 04/15/2026 | Platform/Service name: flyjacksonville.com | Author: Jacksonville Aviation Authority
- 147 Classification: UNCLASSIFIED | Source Type: Blog | Title: Howland, Jacksonville Aviation Authority agree to create new report, committee | Date of Publication: 10/06/2025 | URL: <https://www.jaxdailyrecord.com/news/2025/oct/06/howland-jacksonville-aviation-authority-agree-to-create-new-report-committee> | Date of Access: 04/15/2026 | Platform/Service name: jaxdailyrecord.com | Author: Ric Anderson
- 148 Classification: UNCLASSIFIED | Source Type: Publicly Available Information | Title: Cecil Spaceport Frequently Asked Questions | URL: <https://cecilspaceport.com/post/frequently-asked-questions> | Date of Access: 04/17/2026 | Platform/Service name: cecilspaceport.com | Author: Cecil Spaceport
- 149 Classification: UNCLASSIFIED | Source Type: Publicly Available Information | Title: Florida's Cecil Airport Designated A Space Territory | URL: <https://www.flyjacksonville.com/content.aspx?id=303> | Date of Access: 04/16/2026 | Platform/Service name: flyjacksonville.com | Author: Jacksonville Aviation Authority
- 150 Classification: UNCLASSIFIED | Source Type: Videos | Title: Cecil Airport and Spaceport: Aviation's Next Frontier | Date of Publication: 11/07/2022 | URL: <https://www.youtube.com/watch?v=wqBSQ2qRXRk> | Date of Access: 04/15/2026 | Platform/Service name: youtube.com | Author: JAX Airport
- 151 Classification: UNCLASSIFIED | Source Type: Blog | Title: Wyman Duggan seeks changes in Jacksonville Aviation Authority scope | Date of Publication: 12/27/2025 | URL: <https://floridapolitics.com/archives/770968-wyman-duggan-seeks-changes-in-jacksonville-aviation-authority-scope> | Date of Access: 04/17/2026 | Platform/Service name: floridapolitics.com | Author: A.G. Gancarski

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- 153 Classification: UNCLASSIFIED | Source Type: Publicly Available Information | Title: JAA pivots on Cecil, looking to build on R&D activity at site | Date of Publication: 08/12/2024 | URL: <https://careersourcenortheastflorida.com/jaa-pivots-on-cecil-looking-to-build-on-rd-activity-at-site> | Date of Access: 04/17/2026 | Platform/Service name: careersourcenortheastflorida.com | Author: CareerSource NEFL
- 154 Classification: UNCLASSIFIED | Source Type: Government Report | Title: Spaceport System Territory | URL: <https://www.spaceflorida.gov/space-port-system-territory> | Date of Access: 04/16/2026 | Platform/Service name: spaceflorida.gov | Author: Space Florida
- 155 Classification: UNCLASSIFIED | Source Type: Publicly Available Information | Title: Hermeus Celebrates Groundbreaking for Hypersonic Engine and Flight Test Facility in Jacksonville, Fla. | Date of Publication: 09/09/2024 | URL: <https://www.hermeus.com/newsroom-content/hermeus-celebrates-groundbreaking-for-hypersonic-engine-and-flight-test-facility-in-jacksonville-florida> | Date of Access: 04/17/2026 | Platform/Service name: hermeus.com
- 156 Classification: UNCLASSIFIED | Source Type: Publicly Available Information | Title: Jacksonville Aviation Authority supports Cecil Spaceport reentry license, 'space vehicle facility' | Date of Publication: 09/09/2025 | URL: <https://careersourcenortheastflorida.com/jacksonville-aviation-authority-supports-cecil-spaceport-reentry-license-space-vehicle-facility> | Date of Access: 04/18/2026 | Platform/Service name: careersourcenortheastflorida.com | Author: CareerSource NEFL
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- 158 Classification: UNCLASSIFIED | Source Type: Blog | Title: JAA board unanimously approves \$600K for reentry license at Cecil Spaceport to support aerospace capabilities | Date of Publication: 11/19/2025 | URL: <https://www.news4jax.com/news/local/2025/11/19/live-jaa-board-meets-to-discuss-reentry-license-at-cecil-spaceport-to-expand-aerospace-capabilities> | Date of Access: 05/02/2026 | Platform/Service name: news4jax.com | Author: Briana Brownlee
- 159 Classification: UNCLASSIFIED | Source Type: Individual Analysis Citation | Title: Correspondence with Cecil Airport and Spaceport Managing Director | Date of Access: 05/13/2026 | Source Descriptor: Additional context provided regarding horizontal licensure timeline
- 160 Classification: UNCLASSIFIED | Source Type: Blog | Title: Jacksonville is moving one step closer to becoming a major hub for spaceflight operations | Date of Publication: 11/17/2025 | URL: <https://www.actionnewsjax.com/news/local/jacksonville-is-moving-one-step-closer-becoming-major-hub-spaceflight-operations/TFFFJ47LPVFWXPTSH6KDHVBPGA> | Date of Access: 05/02/2026 | Platform/Service name: actionnewsjax.com | Author: Alexis Cleavenger
- 161 Classification: UNCLASSIFIED | Source Type: Photos | Title: Oklahoma Air and Spaceport | URL: maps.google.com | Date of Access: 05/15/2026 | Platform/Service name: Google Maps | Source Descriptor: Aerial image of Oklahoma Air and Spaceport
- 162 Classification: UNCLASSIFIED | Source Type: Individual Analysis Citation | Title: Deloitte Analysis of Pad Allocation and Key Locations | Date of Access: 05/15/2026 | Author: Deloitte | Source Descriptor: Mapping of leased, available, and unavailable pads/parcels at Oklahoma Air and Spaceport based on publicly available data, conference brochures, and confirmation with individual spaceport, where applicable.
- 163 Classification: UNCLASSIFIED | Source Type: Publicly Available Information | Title: Space Systems Command advances Tactically Responsive Space capabilities to enable faster, more agile response to on-orbit threats | Date of Publication: 02/13/2025 | URL: <https://www.ssc.spaceforce.mil/Newsroom/Article/4066907/space-systems-command-advances-tactically-responsive-space-capabilities-to-enable-faster-more-agile-response-to-on-orbit-threats> | Date of Access: 05/15/2026 | Platform/Service name: ssc.spaceforce.mil | Source Descriptor: Tactically Responsive Space Priorities
- 164 Classification: UNCLASSIFIED | Source Type: Government Report | Title: SB 912 Becomes Law, Securing Oklahoma's Future as Leader in the Space Industry | Date of Publication: 05/22/2025 | URL: <https://oksenate.gov/press-releases/sb-912-becomes-law-securing-oklahomas-future-leader-space-industry> | Date of Access: 05/15/2026 | Platform/Service name: oksenate.gov
- 165 Classification: UNCLASSIFIED | Source Type: Publicly Available Information | Title: Dawn Aerospace Partners with Oklahoma Spaceport to Launch U.S. Based Spaceplane, Unlocking Daily Access to Space | Date of Publication: 06/12/2025 | URL: <https://www.dawnaerospace.com/latest-news/spaceplane-oklahoma> | Date of Access: 05/15/2026 | Platform/Service name: dawnaerospace.com | Author: Dawn Aerospace
- 166 Classification: UNCLASSIFIED | Source Type: Government Report | Title: Oklahoma Space Port Announces Historic Partnership with Dawn Aerospace to Bring Spaceflight to Oklahoma | Date of Publication: 06/23/2025 | URL: <https://oklahoma.gov/aerospace/outreach-advocacy/newsroom/oklahoma-space-port-announces-historic-partnership-with-dawn-aer.html> | Date of Access: 05/15/2026 | Platform/Service name: oklahoma.gov
- 167 Classification: UNCLASSIFIED | Source Type: Photos | Title: Huntsville Air and Spaceport | URL: maps.google.com | Date of Access: 05/15/2026 | Platform/Service name: Google Maps | Source Descriptor: Aerial image of Huntsville Air and Spaceport
- 168 Classification: UNCLASSIFIED | Source Type: Individual Analysis Citation | Title: Deloitte Analysis of Pad Allocation and Key Locations | Date of Access: 05/15/2026 | Author: Deloitte | Source Descriptor: Mapping of leased, available, and unavailable pads/parcels at Huntsville Air and Spaceport based on publicly available data, conference brochures, and confirmation with individuals spaceports, where applicable.
- 169 Classification: UNCLASSIFIED | Source Type: Government Report | Title: Spaceports by State | URL: https://www.faa.gov/space/spaceports_by_state#alabama | Date of Access: 05/15/2026 | Platform/Service name: faa.gov
- 170 Classification: UNCLASSIFIED | Source Type: Blog | Title: Huntsville prepares to welcome Dream Chaser | Date of Publication: 10/10/2022 | URL: <https://businessalabama.com/huntsville-prepares-to-welcome-dream-chaser> | Date of Access: 05/07/2026 | Platform/Service name: Business Alabama | Author: Katherine MacGilvray
- 171 Classification: UNCLASSIFIED | Source Type: Government Report | Title: HSV International Airport approved to land commercial space vehicles | Date of Publication: 05/13/2022 | URL: <https://www.huntsvilleal.gov/hsv-international-airport-approved-to-land-commercial-space-vehicles> | Date of Access: 05/07/2026 | Platform/Service name: Huntsvilleal.gov | Author: Huntsville International Airport
- 172 Classification: UNCLASSIFIED | Source Type: Government Report | Title: Eli Lilly announces \$6 billion pharmaceutical manufacturing investment in Huntsville | Date of Publication: 12/09/2025 | URL: <https://www.huntsvilleal.gov/eli-lilly-announces-6-billion-pharmaceutical-manufacturing-investment-in-huntsville> | Date of Access: 05/06/2026 | Platform/Service name: Huntsvilleal.gov | Author: Huntsville International Airport
- 173 Classification: UNCLASSIFIED | Source Type: Government Report | Title: Governor Ivey Announces Pharmaceutical Giant Lilly Plans \$6 Billion Advanced Manufacturing Plant in Huntsville | Date of Publication: 12/09/2025 | URL: <https://governor.alabama.gov/newsroom/2025/12/governor-ivey-announces-pharmaceutical-giant-lilly-plans-6-billion-advanced-manufacturing-plant-in-huntsville> | Date of Access: 05/07/2026 | Platform/Service name: governor.alabama.gov | Author: Kay Ivey
- 174 Classification: UNCLASSIFIED | Source Type: Blog | Title: The Redstone Arsenal and the Marshall Space Flight Center | URL: <https://www.exploros.com/summary/The-Redstone-Arsenal-and-the-Marshall-Space-Flight-Center-2> | Date of Access: 05/08/2026 | Platform/Service name: exploros.com

Endnotes (cont.)

- 175 Classification: UNCLASSIFIED | Source Type: Publicly Available Information | Title: Eli Lilly Announces Key Project; Company Says Presence of HudsonAlpha was a Contributing Factor in Choosing Huntsville | Date of Publication: 12/10/2025 | URL: <https://www.hudsonalpha.org/eli-lilly-and-company-announces-move-to-huntsville-company-says-presence-of-hudsonalpha-was-a-contributing-factor-in-choosing-huntsville> | Date of Access: 05/08/2026 | Platform/Service name: hudsonalpha.org
- 176 Classification: UNCLASSIFIED | Source Type: Blog | Title: International Intermodal Center passes 1M lifts; Alabama's inland port sees 22.3% increase | Date of Publication: 03/28/2025 | URL: <https://256today.com/international-intermodal-center-passes-1m-lifts-alabamas-inland-port-sees-22-3-increase> | Date of Access: 05/08/2026 | Platform/Service name: 256today.com | Author: Bud McLaughlin
- 177 Classification: UNCLASSIFIED | Source Type: Government Report | Title: About Entry Systems at NASA | Date of Publication: 05/04/2025 | URL: <https://www.nasa.gov/ames/core-area-of-expertise-entry-systems> | Date of Access: 05/28/2026 | Platform/Service name: nasa.gov | Author: Arezu Sarvestani
- 178 Classification: UNCLASSIFIED | Source Type: Government Report | Title: NASA Commercial Partners Make Progress on Low Earth Orbit Projects | Date of Publication: 11/25/2024 | URL: <https://www.nasa.gov/general/nasas-commercial-partners-make-progress-on-low-earth-orbit-projects> | Date of Access: 05/28/2026 | Platform/Service name: nasa.gov
- 179 Classification: UNCLASSIFIED | Source Type: Blog | Title: Op-ed: Commercial Demand in LEO is Lacking. The Government Can Help. | Date of Publication: 05/26/2026 | URL: <https://payloadspace.com/op-ed-commercial-demand-in-leo-is-lacking-the-government-can-help> | Date of Access: 05/28/2026 | Platform/Service name: payloadspace.com | Author: Anne Cheever & Ellen P. Carlin
- 180 Classification: UNCLASSIFIED | Source Type: Academic Article | Title: Space Manufacturing and Trade: Addressing Regulatory Issues | Date of Publication: 12/03/2019 | URL: <https://www.tandfonline.com/doi/pdf/10.1080/14777622.2019.1675431> | Date of Access: 05/28/2026 | Platform/Service name: tandfonline.com | Author: Kamil Muzyka
- 181 Classification: UNCLASSIFIED | Source Type: Blog | Title: NASA & VARDa PARTNER TO ADVANCE THE COMPANY'S COMMERCIAL EARTH RE-ENTRY LOGISTICS SYSTEM | Date of Publication: 08/05/2022 | URL: <https://blog.varda.com/p/nasa-and-var-da-partner-to-advance> | Date of Access: 05/28/2026 | Platform/Service name: blog.varda.com | Author: Varda Space Industries Inc
- 182 Classification: UNCLASSIFIED | Source Type: Blog | Title: Huntsville prepares to welcome Dream Chaser | Date of Publication: 10/10/2022 | URL: <https://businessalabama.com/huntsville-prepares-to-welcome-dream-chaser/> | Date of Access: 05/07/2026 | Platform/Service name: Business Alabama | Author: Katherine MacGilvray
- 183 Classification: UNCLASSIFIED | Source Type: Blog | Title: FAA issues commercial Space Reentry Site Operator License for Huntsville International Airport | Date of Publication: 05/17/2022 | URL: <https://transportationtodaynews.com/news/26660-faa-issues-commercial-space-reentry-site-operator-license-for-huntsville-international-airport/> | Date of Access: 05/08/2026 | Platform/Service name: transportationtodaynews.com | Author: Liz Carey



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