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RESULTS OF 2012 BEACON  
MANUFACTURERS SURVEY

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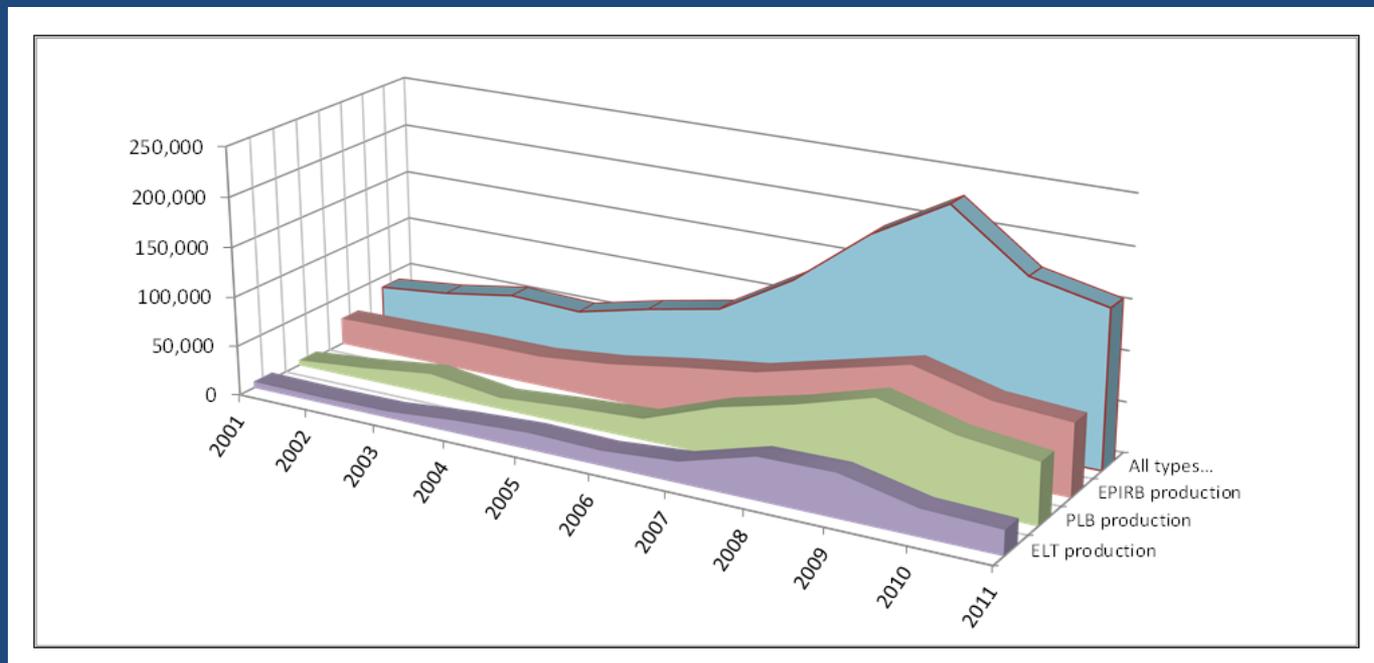
# Results of 2012 Survey of Beacon Manufacturers

# Survey Highlights

- Conducted by the Cospas-Sarsat Secretariat since 1991, annually
- **49** beacon manufacturers participated in 2011 survey
- Geographical distribution of participating manufacturers:
  - Europe: **39%**
  - USA and Canada: **37%**
  - Asia and Australia: **24%**

# Survey Highlights

- In 2011, ~ **157,000** beacons were produced worldwide
- In 2011: annual production decreased by **9.4 %** over 2010
- In 2010: 172,000 beacons produced (**-24 % over 2009**)
- In 2009: 228,000 beacons were produced (+22.5% over 2008)
- In 2008: 186,000 beacons were produced (+45 % over 2007)



# Survey Results

~ **157,000** beacons were produced in 2011 worldwide, including :

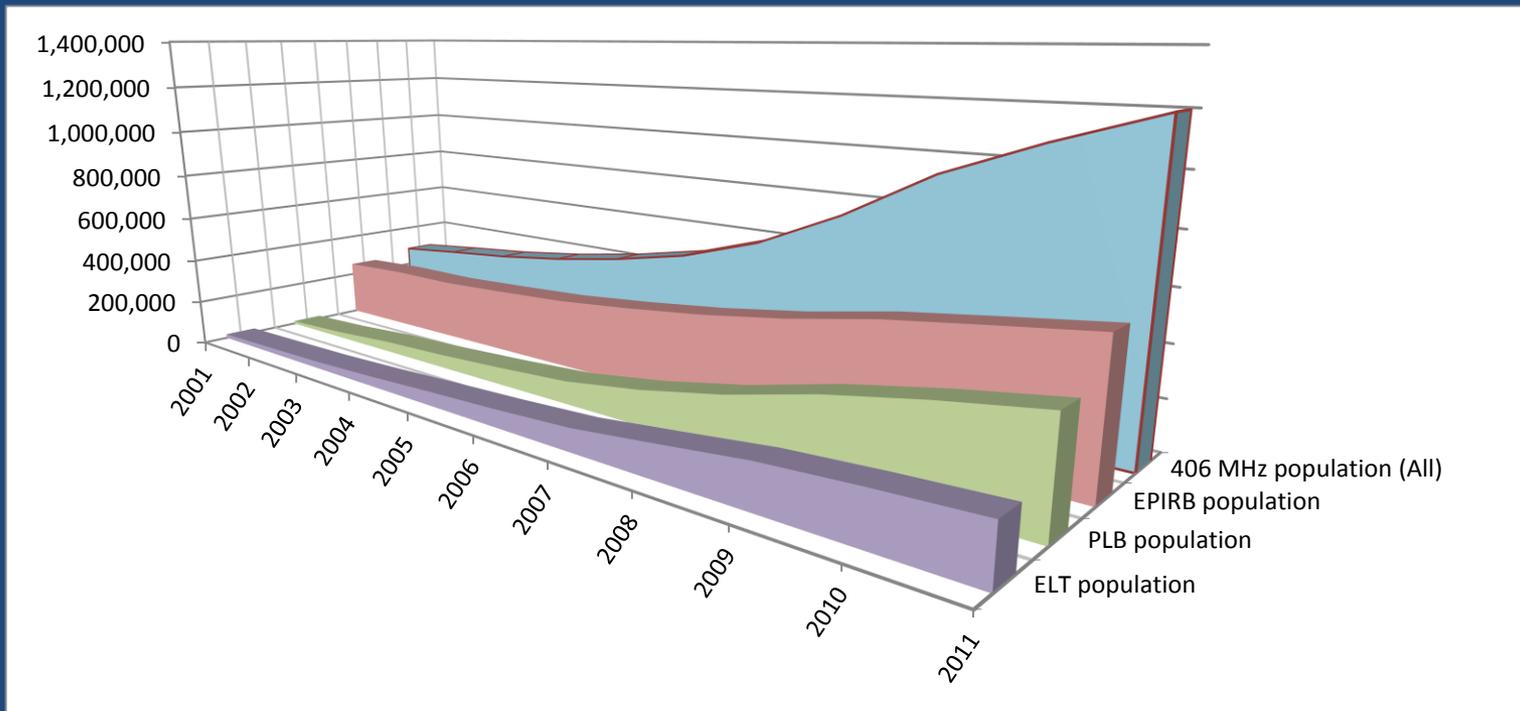
- 73,000 EPIRBs (decrease in annual production: - 6.7% against 2010)
  - production growth in 2005 (+23.5%); in 2006 (+31.4%), in 2007 (+20%) , in 2008 (+31%) and in 2009 (+25%);
  - annual production decrease in 2010: - 38% against 2009.

- 24,000 ELTs (decrease in annual production: -9.2% against 2010)
  - production growth in 2005 (+31 %), in 2006 (- 10%) , in 2007 (+40%), in 2008 (+102%) and in 2009 (+3%) - 20% against 2009
  - annual production decrease in 2010: - 20% against 2009.

- 60,000 PLBs (decrease in annual production: -12.4% against 2010)
  - production growth in 2005 (+44 %), in 2006 (+ 30%), in 2007 (+125%), in 2008 (+37%) and in 2009 (+33%)
  - annual production decrease in 2010: - 22% against 2009.

# Estimated Beacon Population

- **Over 1,200,000** beacons operating at 406 MHz were in use at the end of 2011
- Annual increase in global beacon population : **~ 11%**



# Survey Highlights

- 11 manufacturers (22% of all respondents) reported 'zero' production in 2011, in 2010: 22% , in 2009 : 24 %
- ...with 1 - 499 units produced in 2011: 12 (24%), in 2010: 28%
- ...with > 500 units produced in 2011: 26 (53%), in 2010: 50%



# Survey Results

50 % of active beacon manufacturers reported increase in production volumes in 2011 (40% in 2010)

in 2011-12, 5 new beacon manufacturers informed Cospas-Sarsat of their plans to develop and type approve new models

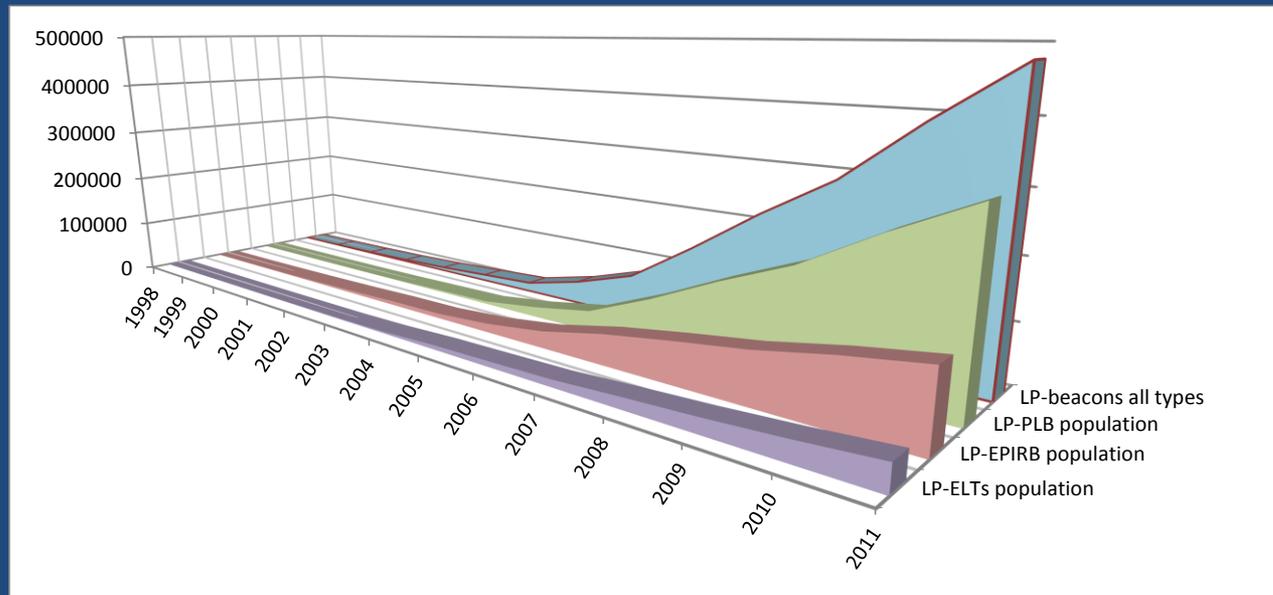
# Main reasons for global production slow-down in 2011 (\*)

- Global economical recession, sharp drop in production of new vessels (ships and aircraft);
- Reductions in government spending leading to government programmes put “on-hold”;
- Delays in implementation of legislation stimulating beacon use and production (e.g. in ELT carriage requirements);
- Slower than expected deployment of new models.

**(\*) Based on information provided by 5 beacon manufacturers**

# Location Protocol Beacons

- 1995: Approval of technical requirements for location protocols by CSC-15
- 1998: Type approval of the first LP-beacons
  - TAC-102 , NAT's EPIRB model "SATFIND 406 GPIRB" with int. GPS
  - TAC-104, ARTEX' ELT model "ELT 110-406 NAV" with ext. nav. interface
- 2012: Over 477,000 LP-beacons deployed worldwide (40% of global population).



# Survey Results : Location Protocol Beacons

> **88,000** (or 56 % of all, same as in 2010 ) 406 MHz beacons produced in 2011 by 22 beacon manufacturers were LP- capable, including:

- 19, 000 EPIRBs (26% of all EPIRBs produced in 2011)
- 59,000 PLBs (98% of all PLBs produced in 2011)
- 10,000 ELTs (41% of all ELTs produced in 2011)



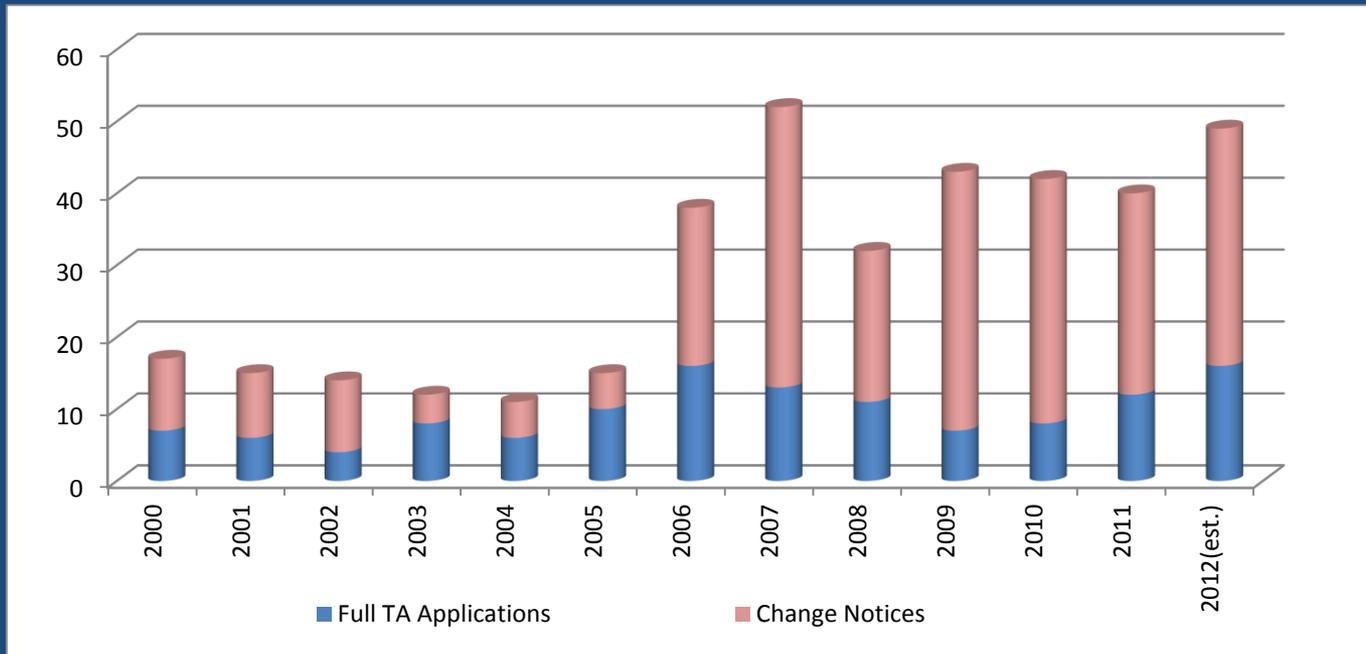
## Manufacturers' Plans for 2012

- **Over 212,000** beacons to be produced in 2012 (+ 35 % over actual production in 2011), including:
  - » 87,500 EPIRBs
  - » 38,000 ELTs
  - » 86,000 PLBs
- In 2012 global 406 MHz beacon population might reach 1,365,000 (annual growth + 14%)
- 58 % of all produced beacons will be LP-beacons

# Accuracy of Beacon Manufacturers' Forecast

	Manufacturers' Forecast for 2011	Actual 2011	2011 Actual over Forecast Discrepancy, %	2010 Actual over Forecast Discrepancy, %
EPIRBs and SSAS, production	80,000	71,800	(-10.2)	(-17.6)
ELTs, Production	45,000	24,300	(-44.5)	(-37.7)
PLBs, Production	101,000	60,600	(-40.0)	(-39.3)
All beacon types, production	226,000	157,000	(-30.5)	(-31.0)

# Type Approval Activity



In 2012, the Secretariat expects 16 applications for Type Approval of new beacon models and 33 Change Notices from 18 beacon manufacturers

# For more information...

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**Thank you !**