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**)

![Graph showing production trends from 2001 to 2011]
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.
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

<table>
<thead>
<tr>
<th></th>
<th>Manufacturers’ Forecast for 2011</th>
<th>Actual 2011</th>
<th>2011 Actual over Forecast Discrepancy, %</th>
<th>2010 Actual over Forecast Discrepancy, %</th>
</tr>
</thead>
<tbody>
<tr>
<td>EPIRBs and SSAS, production</td>
<td>80,000</td>
<td>71,800</td>
<td>(-10.2)</td>
<td>(-17.6)</td>
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<tr>
<td>ELTs, Production</td>
<td>45,000</td>
<td>24,300</td>
<td>(-44.5)</td>
<td>(-37.7)</td>
</tr>
<tr>
<td>PLBs, Production</td>
<td>101,000</td>
<td>60,600</td>
<td>(-40.0)</td>
<td>(-39.3)</td>
</tr>
<tr>
<td>All beacon types, production</td>
<td>226,000</td>
<td>157,000</td>
<td>(-30.5)</td>
<td>(-31.0)</td>
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</tbody>
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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 !