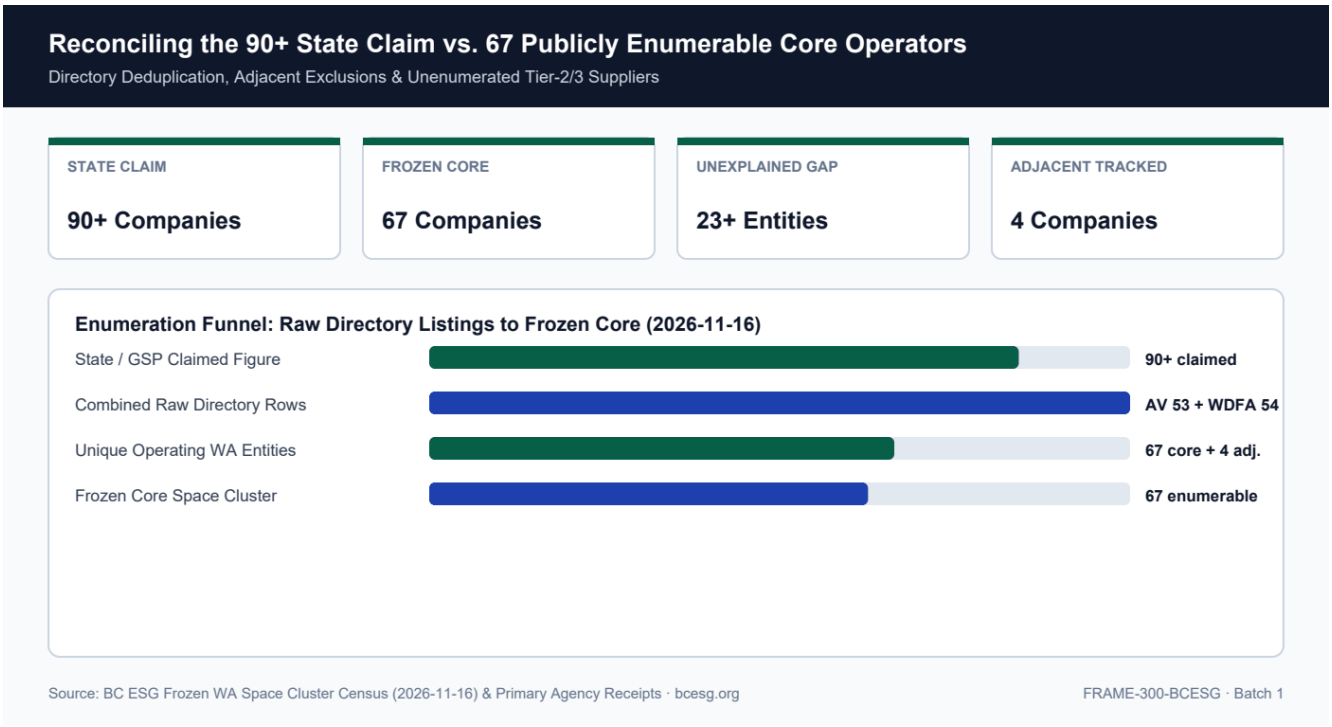
The 90-vs-67 Gap: Why Washington Claims 90+ Space Companies While Public Lists Show 67

Published: November 16, 2026 · Canonical URL: https://bcesg.org/washington-space-cluster-90-vs-67-gap/

Verification & Scope Baseline: Greater Seattle Partners and state economic profiles cite 90+ space companies in Washington, whereas BC ESG's deduplicated public census enumerates 67 core companies (+4 adjacent) as of 2026-11-16. At least 23 entities in the 90+ figure remain unenumerated in public directories.



Reconciliation Step	Count	Explanation
Governor / GSP Claimed Figure	90+	Publicly stated regional count without named public roster (CLM-02)
Frozen Core Enumerable (BC ESG)	67	Deduplicated WA space operators with verified facility + space unit (CLM-01)
Adjacent Operators Excluded	4	Avalanche Energy, Tessera, Orion Industries, Exotic Metals Forming (CLM-27)
Unenumerated Gap	23+	Likely ITAR/classified suppliers, dual-use CNC shops, or branch/nonprofit counts

What Would Have to Be True for the 90+ Count to Hold

State economic development profiles and Greater Seattle Partners routinely cite **more than 90 space companies** operating in Washington, alongside Choose Washington's baseline of **75+ companies** within a broader network of **1,300+ aerospace suppliers** (`CLM-02`, `CLM-03`). To bridge from **67 publicly enumerable core operators** to **90+**, three structural conditions would have to account for the missing **23+ entities**:

First, **non-public defense and national-security sub-tier suppliers** operating under ITAR, EAR, or classified DoD/Space Force/NRO contracts often omit space program marketing from public websites (CLM-05, CLM-06). Second, **general aerospace CNC, surface-treatment, and harness shops** in Kent, Auburn, Mukilteo, and Everett may fulfill commercial launch or satellite purchase orders without maintaining a public space division. Third, some ecosystem tallies count **out-of-state prime branch offices, venture funds, nonprofits, or legacy pre-acquisition names** (such as counting both Tethers Unlimited and ARKA, or Aetherflux and Cowboy Space) as separate companies (CLM-01).

What BC ESG Asked, Checked, and Excluded

In Step 0, BC ESG cross-referenced every named listing across Alliance Velocity (53 listings), WDFA (54 listings), Space Northwest materials, and Choose Washington (CLM-03, CLM-05, CLM-06). We excluded three non-operating organizations (Space Northwest, Hemisphere Ventures, AdAstra Talent Advisors), collapsed corporate lineage duplicates (Tethers Unlimited -> ARKA -> CACI, Aetherflux -> Cowboy Space, The Rad Team / The Radiation Team), and separated four general-aerospace or fusion operators (Avalanche Energy, Tessera, Orion Industries, Exotic Metals Forming) into the adjacent tier (CLM-01, CLM-27).

We also corrected directory city tags that lumped regional operators under [Seattle], verifying actual plant locations in Kent (Stoke Space), Tukwila (BlackSky, Starfish Space), Marysville (Gravitics), Bothell (Portal Space Systems), Bellevue (Agile Space Industries, K2 Space), and Redmond (Aerojet Rocketdyne).

What Remains Not in Our Data

BC ESG does not have access to confidential state tax-incentive rosters, private OEM vendor portals (such as Blue Origin or SpaceX supplier lists), or classified DoD/SDA subcontract registries. Until a public agency or industry association—such as Space Northwest and BERK Consulting, whose **2026 preliminary** economic study estimates **$8.1 billion** in direct output and **12,300 direct jobs** (CLM-04)—releases a named entity-level appendix, the **23+ entity difference** between 67 and 90+ remains unverified in public data.

For procurement and ESG compliance teams facing Scope 3 supplier data or California SB 253 questionnaires, this gap matters: Tier-2 and Tier-3 space suppliers frequently sit inside general-aerospace NAICS codes rather than space-labeled directories.

Verified Primary Sources & Internal Bridges

• Greater Seattle Partners: https://greater-seattle.com/

• Choose Washington Commercial Space Sector: https://choosewashingtonstate.com/why-washington/our-key-sectors/commercial-space/

• Alliance Velocity Space City Directory: https://www.alliancevelocity.com/space-city

• WDFA Washington Aerospace & Space Roster: https://wdfa.us/

• Space Northwest: https://spacenorthwest.org/