

AI To Be 99% of SpaceX Value by 2031

Elon Musk declares AI will soon surpass all other business lines, redefining commercial space.

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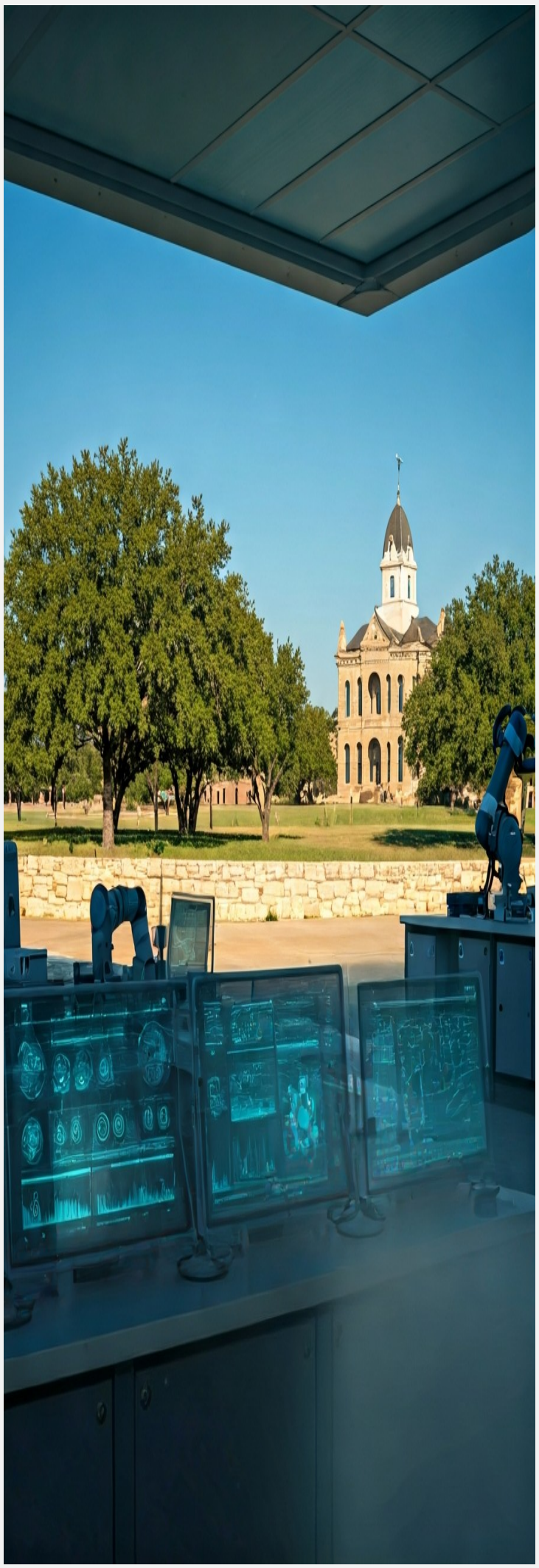
THE DATA

99%

SpaceX Value from AI

Elon Musk's projection for AI's share of SpaceX's total value within five years.

In a recent company update, Elon Musk announced a pivotal strategic shift for SpaceX, projecting that AI will constitute roughly 99% of the company's total value within five years. This bold statement highlights AI's rapidly growing importance, with AI revenue expected to surpass all other business lines, including Starlink and launch services, as early as September 2026. This reorientation underscores AI's transformative potential beyond traditional aerospace applications.



Source: KeepTrack.space · Published August 12, 2026

01

Redefining Commercial Space Revenue Models

This strategic pivot signals a fundamental re-evaluation of what constitutes value in the commercial space sector. Where launch services and satellite constellations once dominated, AI-driven applications and infrastructure are now positioned to become the primary revenue drivers, indicating a maturation of AI's economic impact in space.



02

Orbital AI: The Next Compute Frontier

SpaceX's ambition to scale its AI compute capacity to 10 gigawatts by the end of 2027, with projections of $300 billion to $500 billion in annual revenue, points to the emergence of orbital data centers. This move positions space as a critical new frontier for high-performance computing, potentially solving terrestrial power and cooling challenges and enabling unprecedented AI capabilities.

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