

Lunar Exploration (2)
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Author: Dr. Luigi Scatteia
PricewaterhouseCoopers Advisory (PwC), France, scatteia.luigi@fr.pwc.com

Mr. Yann Perrot
PricewaterhouseCoopers Advisory (PwC), France, yann.perrot@pwc.com

Ms. Tala ATIE
PricewaterhouseCoopers Advisory (PwC), France, tala.atie@pwc.com

Mrs. Elisa CARCAILLON
PricewaterhouseCoopers Advisory (PwC), France, elisa.carcaillon@pwc.com

Ms. Victoria Carter-Cortez
PricewaterhouseCoopers Advisory (PwC), France, victoria.carter-cortez@pwc.com

Mr. Siddharth Shihora
International Space University (ISU), France, siddharth.shihora@community.isunet.edu

LUNAR MARKET ASSESSMENT: MARKET TRENDS AND CHALLENGES IN THE
DEVELOPMENT OF A LUNAR ECONOMY

Abstract

Global developments surrounding the Artemis programme supported by the Commercial Lunar Payload services, NextSTEP partnerships and the establishment of the Artemis Accords are paving the way for a commercial space sector that is increasingly present in lunar activities. This paper presents results of an in-depth lunar market assessment study performed by PwC Space Practice. It explores how the current trends in space exploration and space resource utilization enable the emergence of new capabilities at increasingly lower price points. It also discusses the expected trends in supply and demand related to key markets of the lunar economy: Lunar Transportation as well as the Space Resource market and its associated Data markets. The paper examines progress in each field, their drivers and challenges, all in the frame of current programmes and activities, technology developments, global cooperation and the existing economy and financing. Themes considered are understood in line with geographical trends, providing analysis on developments in the USA, Europe, Asia, Russia as well as the Rest of the World. Quantitative market assessment estimates are presented for each market segment investigated for different scenarios.