

Lunar Exploration (2)  
Lunar Exploration (2) (2)

Author: Dr. Luigi Scatteia  
PricewaterhouseCoopers Advisory (PwC), France

Mr. Yann Perrot  
PricewaterhouseCoopers Advisory (PwC), France

Ms. Tala ATIE  
PricewaterhouseCoopers Advisory (PwC), France

Mrs. Elisa CARCAILLON  
PricewaterhouseCoopers Advisory (PwC), France

Ms. Victoria Carter-Cortez  
PricewaterhouseCoopers Advisory (PwC), France

Mr. Siddharth Shihora  
International Space University (ISU), France

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.