

# PRESS RELEASE

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**Survey on the Future and Strategic Importance of the European Space Industry**

## Two-thirds of the industry doubt Europe's ability to scale in space

- Europe's space industry is technologically strong, but not economically competitive on the international stage
- The industry continues to think in terms of individual projects rather than scalable products
- Growth is expensive: project-oriented structures drive complexity, capital requirements and integration effort
- Lack of financing and investment further hampers growth and industrial scaling

**Ludwigsburg** – Europe's space industry is facing a historic surge in demand. Satellite constellations, defense programs, secure communication infrastructures and the expansion of European sovereignty are significantly increasing the need for space systems. For Europe's space industry to become internationally competitive not only technologically but also economically, it must scale substantially. While Europe possesses strong technologies, excellent engineering capabilities and deep systems expertise, production still largely follows project-based structures.

As a result, scaling is costly, capital-intensive and operationally complex – posing a major challenge to the industry's ambitious growth targets. This is shown by a survey conducted among 577 decision-makers and experts from Germany, Italy, France and the United Kingdom.

Giuseppe La Marca, Partner and Sector Lead Aerospace: "If the European space industry does not change its industrial logic, they will not remain relevant in the global race for space."

### Europe's unresolved equation

Today, the importance of space extends far beyond the sector itself. Satellites form the foundation of modern communication, navigation and security systems. Europe's ability to

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independently develop and operate these infrastructures is increasingly becoming a matter of economic competitiveness and strategic sovereignty.

However, the industry is under pressure: international competitors and start-ups are demonstrating how space systems can be industrialized quickly and efficiently. Europe has not yet succeeded in doing so. One key reason lies in the industry's still dominant project-based logic. This model enables high flexibility, customized development and technological excellence. However, it is poorly suited for industrial scaling. In project-oriented structures, every additional system increases engineering, integration and capital expenditure. As a result, growth creates additional complexity instead of reducing unit costs.

Another major issue compounds the challenge: 27% of respondents identify insufficient financing and investment as a central obstacle. In an industry driven by projects and dependent on substantial upfront investment, the lack of capital further intensifies scaling difficulties.

The product-based logic established in industries such as automotive manufacturing is considered a potential countermodel. Platforms, standardization and reusability enable rapid and cost-efficient scaling. Without such a transformation, Europe risks falling behind and jeopardizing both its sovereignty and competitiveness – with consequences for economic performance, technological sovereignty and geopolitical capacity to act.

### **Between project logic and product logic**

The growth ambitions of the European space industry are considerable – yet currently difficult to achieve. Two-thirds of respondents rate the industry's scalability as low. However, the industry does not necessarily have to choose between project-based and product-based logic. What is needed instead is a hybrid model: combining the technological flexibility of project-driven development with the scalability of standardized platforms.

The survey results highlight a central tension within the European space industry: the willingness to scale exists, but industrial transformation is lagging behind. Whether Europe can strengthen its position in the global space market will therefore depend less on developing new technologies than on its ability to efficiently and scalably transfer these technologies into industrial production.

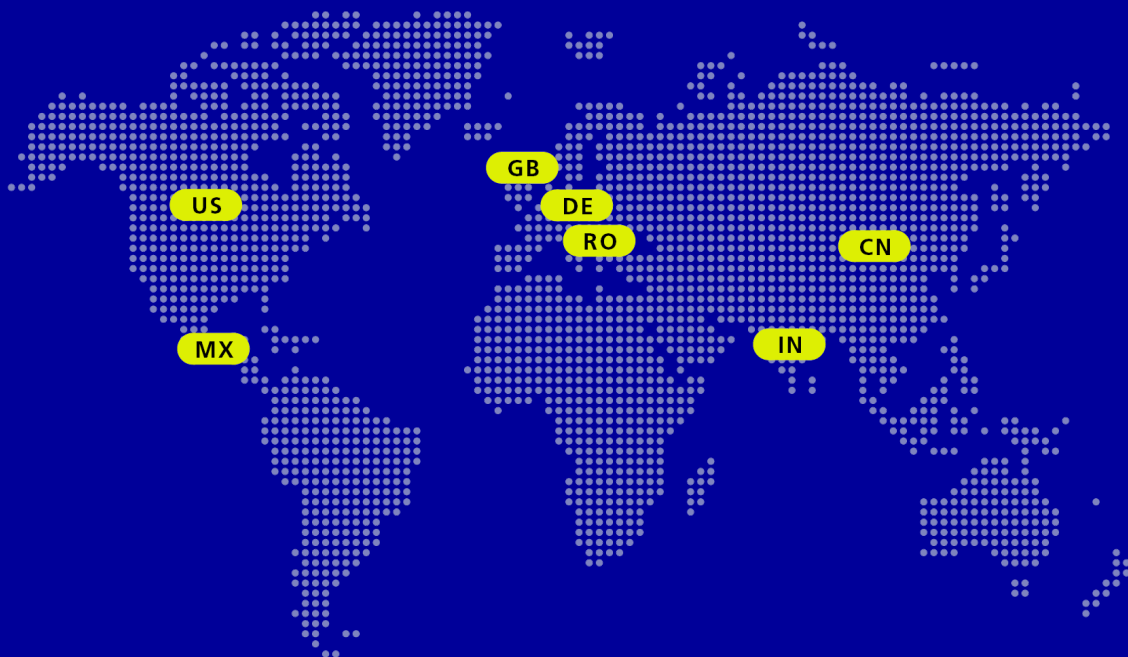
### **About the survey**

A compact overview of the survey's key findings is available here: [Space Report | MHP – A Porsche Company](#)

The survey institute Civey conducted an online survey on behalf of MHP between April 17 and May 13, 2026, among 577 decision-makers in the aerospace sector across Germany, the United Kingdom, France and Italy. Due to quota sampling and weighting, the results are representative within a statistical margin of error of 4.1 percentage points for the respective overall results.

The full paper, including detailed analyses, additional data and in-depth assessments, will be published in July 2026.

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