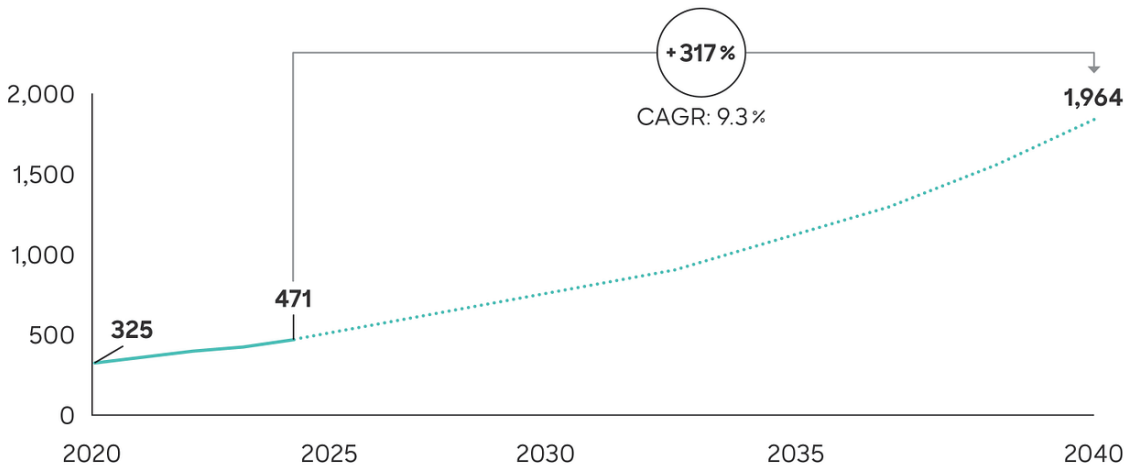


## Boom times in space

Sales development of the global space industry,  
2020–2040 [billion euros]



Source ESA, Roland Berger

Sep 25, 2025 11:00 CEST

## Innovation creates growth: Space is key to the future of German industry

- Germany and Europe have faced a widening gap to the United States and China in space in recent years – a development with far-reaching consequences for industry as a whole
- To strengthen German industry across all sectors, we need a new perspective on space, alongside structural reforms, greater investment and more freedom rather than new regulations
- Germany alone must increase its public investment in space by EUR 93 billion through 2040 compared to the baseline forecast in order to increase Europe's market share from 17% today to 25%

Munich, September 2025: The space industry is an engine of growth and a driver of innovation for modern economies. In the study "Aufholjagd im All (The space catch-up)", conducted in cooperation with the Federation of German Industries (BDI), Roland Berger highlights the potential of the new space economy for the future of German industry. The global market for space-based infrastructure and services is set to quadruple – from almost EUR 500 billion today to EUR 2,000 billion by 2040. This holds considerable potential for Germany's economy thanks to the nation's specialized engineering expertise, which is in great demand in the space industry.

### **New mindset: New space can be the basis for technology leadership**

The US Apollo program is an example of what targeted investment in space can accomplish long term. Many of the program's achievements still form the basis for the United States' technology leadership today. We in Germany need to have this same mindset about the importance and the potential of space. Space will strengthen our industry across all sectors, secure our technological sovereignty and create new business models.

We need to act on a real sense of urgency if we are to catch up with the leading space-faring nations, the United States and China. Just to maintain Europe's current market share at around 17% in the growing space market, some EUR 237 billion in additional investment will be needed in the period to 2040. Germany alone will have to raise its spending by EUR 56 billion in the same timeframe. To increase its market share to 25% over the equivalent period, Germany will need to invest a further EUR 93 billion. Europe's investments will have to rise by EUR 412 billion in total to achieve the same. Besides higher investment, we need greater ambition: targeted government demand, better underlying conditions through the removal of red tape, more risk taking and a clear strategic vision – of space as a driver of technology leadership.

### **Pressing need to close the investment gap against international peers**

"Space is a key industry for the future of Europe," says Stefan Schaible, Global Managing Partner at Roland Berger. "If we want to strengthen our role in the world, we must be at the forefront of the space industry. Space-based technologies are drivers of both growth and security. It will take investment, accelerated processes and a clear vision of assuming a globally leading position."

Just how far behind we are is evident from a look at the investment gap that

severely hampers the German space sector compared to the United States and China. Public spending on space projects in Germany stood at around EUR 2.5 billion in 2024. The US, already the leading space nation, invested EUR 72 billion. China, too, significantly increased its spending to around EUR 18 billion in 2024. Other space-faring nations like Japan and France are also investing considerably more than Germany.

### **Mitigating dependency risks**

Decades of underfunding have left their mark. For example, Germany currently operates just over 80 satellites of its own, while the US has more than 10,000 and China over 900 – rising fast. This creates problematic dependencies in areas like satellite communications: There is currently no German or European alternative to the American network. Yet data from space is absolutely indispensable today – for our defense capabilities as well as for key processes in modern economies, such as logistics and supply chain management, new mobility solutions and Industry 4.0 applications.

"In a geopolitically uncertain world, space is much more than technology – it is essential security infrastructure. Nations that do not have their own space capabilities are dependent and they are vulnerable," says Peter Leibinger, BDI President. "At the same time, space opens up new growth opportunities for German industrial companies with their engineering expertise – from global data communications and lunar logistics to space mining. For Germany to take advantage of these opportunities, decisive political action is needed: Space must be understood as the strategic backbone of our industrial strength and our technological sovereignty. Particularly in a high-tech field such as space, policymakers must foster – not curb – agility, risk taking and innovation. With space services being dual use by nature, Germany should significantly increase its ESA investments – from three to six billion euros over the next three years. The Ministerial Council Conference in Bremen in November, which Germany is chairing, should send a signal embodying a new sense of urgency for Europe."

### **Recommendations for achieving the space catch-up**

Alongside their background analyses and calculations, the study authors developed a series of proposals and recommendations for political decision-makers that will enable Germany to compete with the US and China. First among them are measures to raise awareness throughout society of the importance and the opportunities of space. In addition, government contracts and all investments need to be not only expanded but also specifically targeted at achieving the greatest economic, social, security and strategic

benefits.

National and European space agencies are called upon to coordinate their efforts more closely and focus more strongly on commercial aspects. For the new space economy to grow, Germany and Europe need more freedom to innovate and less bureaucracy.

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#### About Roland Berger

Roland Berger is one of the world's leading strategy consultancies with a wide-ranging service portfolio for all relevant industries and business functions. Founded in 1967, Roland Berger is headquartered in Munich. Renowned for its expertise in transformation, innovation across all industries and performance improvement, the consultancy has set itself the goal of embedding sustainability in all its projects. Roland Berger generated revenues of around 1 billion euros in 2024.

#### About the BDI

The Federation of German Industries (BDI) is the umbrella organization of German industry. It represents the interests of some 40 industry associations and over 100,000 companies to policymakers and the public. The BDI is a voluntary membership organization that promotes German industry by consolidating the positions of its members and communicating them to political decision-makers in Germany and around the world. The Federation plays an important role in shaping opinion and decision-making in economic policy, thereby helping to strengthen Germany's position as a location for business and investment.

## Contacts



### **Attila Rosenbaum**

Press Contact

Global Head of Corporate Communications & PR

[attila.rosenbaum@rolandberger.com](mailto:attila.rosenbaum@rolandberger.com)

+49 40 37631 4244



### **Silvia Constanze Zösch**

Press Contact

Corporate Communications & PR, Press Contact Global PR

[silvia.zoesch@rolandberger.com](mailto:silvia.zoesch@rolandberger.com)

+49 89 9230 8750



### **Nico A. Jaenecke**

Press Contact

Corporate Communications & Public Relations

[nico.jaenecke@rolandberger.com](mailto:nico.jaenecke@rolandberger.com)

+49 40 37631 4229