

# **In-Situ Resource Utilisation (ISRU) Manufacturing Market Forecasts to 2032 – Global Analysis By Resource Type (Lunar Regolith, Martian Soil & Minerals, In-Situ Metals & Alloys, Ice-Derived Water Resources and Atmospheric Gases), Platform, Technology, Application, End User, and By Geography**

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## **Abstracts**

According to Statistics MRC, the Global In-situ Resource Utilisation (ISRU) Manufacturing Market is accounted for \$398.9 million in 2025 and is expected to reach \$578.9 million by 2032 growing at a CAGR of 5.4% during the forecast period. ISRU manufacturing involves using local resources found at mission destinations such as the Moon, Mars, or asteroids to produce critical mission consumables, infrastructure materials, and spare parts. Technologies for ISRU include material extraction, handling, processing, and 3D printing, enabling the fabrication of building components, habitats, and tools directly on-site, reducing the need for costly Earth launches and enhancing sustainability for space exploration.

According to NASA's technology roadmaps, utilizing Martian regolith for 3D printing habitats and components is a critical enabling technology for sustainable, long-duration lunar and planetary exploration missions.

### **Market Dynamics:**

Driver:

Increasing space agency missions

Increasing space agency missions are accelerating ISRU manufacturing adoption as lunar, Martian, and deep-space programs prioritize autonomous material sourcing to reduce mass-to-orbit costs. Fueled by Artemis initiatives, commercial lunar payload services, and renewed planetary exploration cycles, agencies are shifting from Earth-dependent logistics to in-situ extraction for construction, oxygen generation, and propellant production. This transition supports long-duration habitation, enabling sustained surface operations. As mission frequency expands, ISRU systems become central to scalable extraterrestrial infrastructure and future interplanetary supply chains.

Restraint:

Extreme variability in extraterrestrial regolith composition

Extreme variability in extraterrestrial regolith composition acts as a limiting factor, creating processing uncertainty for ISRU systems designed for consistent material behavior. Differences in mineralogy, grain morphology, volatiles, and mechanical properties across landing zones complicate extraction rates, sintering stability, and refining efficiency. These inconsistencies require highly adaptable processing units and extensive pre-mission characterization. The absence of standardized regolith datasets increases engineering risk and raises cost burdens for system modularity and redundancy, slowing commercialization timelines for surface manufacturing technologies.

Opportunity:

Emergence of robotic minerals

The emergence of robotic minerals—autonomous robotic systems capable of identifying, extracting, and processing in-situ materials—presents a significant opportunity for ISRU manufacturing. These robotic platforms leverage AI-enabled geological sensing, adaptive excavation, and real-time mineral sorting to increase yield precision. By reducing human operational constraints and enabling continuous extraction cycles, robotic minerals enhance productivity across lunar and Martian surfaces. Their integration with autonomous refineries, 3D-printing habitats, and oxygen-generation units accelerates the development of closed-loop resource ecosystems vital for long-term space habitation.

Threat:

## Mission delays caused by deep-space radiation events

Mission delays caused by deep-space radiation events pose a substantial threat to ISRU deployment schedules and mission continuity. Solar particle events and galactic cosmic rays can disrupt electronics, degrade robotic systems, and trigger operational stand-downs, slowing surface manufacturing cycles. Prolonged radiation exposure may also compromise sensor calibration, thermal controls, and communication infrastructure essential for ISRU operations. As radiation unpredictability increases risk across mission timelines, operators face higher contingency costs and potential interruptions in resource-processing workflows.

## Covid-19 Impact:

Covid-19 created temporary slowdowns in component manufacturing, launch schedules, and cross-national space collaboration, delaying several ISRU demonstration missions. However, the pandemic simultaneously accelerated interest in autonomous, low-crew surface operations as agencies prioritized resilient, remotely supervised technologies. Strengthened investment in robotics, automated sample processing, and digital mission planning created favorable conditions for ISRU adoption. As supply chains stabilize and commercial launch activity rebounds, ISRU development benefitted from renewed funding cycles and expanded partnerships focused on long-duration off-Earth manufacturing.

The lunar regolith segment is expected to be the largest during the forecast period

The lunar regolith segment is expected to account for the largest market share during the forecast period, resulting from its strategic importance in producing structural materials, oxygen, and potential metal feedstocks. Lunar regolith is abundant, accessible, and well-characterized compared to Martian or asteroid analogs, enabling earlier-scale demonstration missions. Its suitability for sintering, additive construction, and molten-regolith electrolysis supports multiple infrastructure functions. With lunar surface operations central to near-term exploration, regolith-based ISRU systems anchor the first commercially viable extraterrestrial manufacturing pipelines.

The lunar platforms segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the lunar platforms segment is predicted to witness the highest

growth rate, propelled by increasing deployment of modular surface stations that integrate power systems, excavation robots, processing reactors, and construction modules. These platforms act as operational hubs enabling continuous ISRU workflows for fuel generation, habitat fabrication, and resource storage. Rising collaboration among space agencies and commercial vendors accelerates platform development. As lunar surface missions expand, these integrated bases become mission-critical for scalable, long-duration ISRU manufacturing.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share, attributed to robust lunar exploration programs led by China, India, and Japan. Expanding investment in sample-return missions, robotic landers, and surface mobility systems fuels regional ISRU interest. Government-backed infrastructure programs and partnerships with private aerospace firms strengthen capability development. The region's rapid expansion of launch capacity, low-cost mission strategies, and increasing focus on lunar industrialization position Asia Pacific as a dominant hub in early ISRU deployment.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR associated with aggressive ISRU development initiatives under NASA's Artemis program and expanding commercial lunar service providers. Strong R&D capabilities, advanced robotics ecosystems, and extensive collaborations with aerospace contractors accelerate ISRU technology maturation. The rise of privately funded lunar mining, regolith-processing demonstrations, and in-space construction startups further boosts adoption. With sustained federal funding and a well-developed innovation pipeline, North America is positioned for rapid ISRU growth.

Key players in the market

Some of the key players in In-situ Resource Utilisation (ISRU) Manufacturing Market include Astrobotic Technology, ispace, Intuitive Machines, Space Forge, OffWorld, Terran Orbital, Blue Origin, Astroscale, Lockheed Martin, Boeing, Honeybee Robotics, Airbus, Masten Space Systems, Planetary Resources, NASA, Deep Space Industries and Foundation.

### **Key Developments:**

In October 2025, Lockheed Martin unveiled its 'Mars Forge' ISRU Pilot Plant, a compact, automated system designed to extract and process Martian regolith into high-purity aluminum and iron feedstock for on-site 3D printing of structural components and spare parts.

In September 2025, Blue Origin launched its 'Blue Alchemist' Processor, a scalable solar-thermal reactor that can be deployed on the lunar surface to extract oxygen and silicon from lunar soil (regolith), producing photovoltaic cells to generate electricity on the Moon.

In August 2025, NASA awarded a milestone-based contract to a consortium led by Honeybee Robotics and Masten Space Systems to demonstrate the full lifecycle of their 'RAPID' (Regolith to Architecture via Processing and In-situ Design) system, from mining to 3D printing a landing pad, in a terrestrial analog environment.

#### Resource Types Covered:

Lunar Regolith

Martian Soil & Minerals

In-Situ Metals & Alloys

Ice-Derived Water Resources

Atmospheric Gases

#### Platforms Covered:

Lunar Platforms

Martian Platforms

Asteroid Mining Stations

Orbital ISRU Facilities

Lagrange Point Stations

Deep-Space Manufacturing Hubs

Technologies Covered:

Regolith Extraction Systems

In-Situ Additive Manufacturing Systems

Electrolysis & Chemical Conversion

Autonomous Excavation Robots

In-Situ Fuel Production Modules

Applications Covered:

Habitat Construction

Fuel Production for Spacecraft

Life Support & Oxygen Generation

Power Infrastructure Deployment

Scientific Infrastructure Development

End Users Covered:

Space Agencies

Commercial Space Companies

Defense & Strategic Space Programs

Space Mining Startups

Research Institutions

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

**What our report offers:**

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments

- Supply chain trends mapping the latest technological advancements

### **Free Customization Offerings:**

All the customers of this report will be entitled to receive one of the following free customization options:

#### Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

#### Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

#### Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

## Contents

### **1 EXECUTIVE SUMMARY**

### **2 PREFACE**

- 2.1 Abstract
- 2.2 Stake Holders
- 2.3 Research Scope
- 2.4 Research Methodology
  - 2.4.1 Data Mining
  - 2.4.2 Data Analysis
  - 2.4.3 Data Validation
  - 2.4.4 Research Approach
- 2.5 Research Sources
  - 2.5.1 Primary Research Sources
  - 2.5.2 Secondary Research Sources
  - 2.5.3 Assumptions

### **3 MARKET TREND ANALYSIS**

- 3.1 Introduction
- 3.2 Drivers
- 3.3 Restraints
- 3.4 Opportunities
- 3.5 Threats
- 3.6 Technology Analysis
- 3.7 Application Analysis
- 3.8 End User Analysis
- 3.9 Emerging Markets
- 3.10 Impact of Covid-19

### **4 PORTERS FIVE FORCE ANALYSIS**

- 4.1 Bargaining power of suppliers
- 4.2 Bargaining power of buyers
- 4.3 Threat of substitutes
- 4.4 Threat of new entrants
- 4.5 Competitive rivalry

## **5 GLOBAL IN-SITU RESOURCE UTILISATION (ISRU) MANUFACTURING MARKET, BY RESOURCE TYPE**

- 5.1 Introduction
- 5.2 Lunar Regolith
- 5.3 Martian Soil & Minerals
- 5.4 In-Situ Metals & Alloys
- 5.5 Ice-Derived Water Resources
- 5.6 Atmospheric Gases

## **6 GLOBAL IN-SITU RESOURCE UTILISATION (ISRU) MANUFACTURING MARKET, BY PLATFORM**

- 6.1 Introduction
- 6.2 Lunar Platforms
- 6.3 Martian Platforms
- 6.4 Asteroid Mining Stations
- 6.5 Orbital ISRU Facilities
- 6.6 Lagrange Point Stations
- 6.7 Deep-Space Manufacturing Hubs

## **7 GLOBAL IN-SITU RESOURCE UTILISATION (ISRU) MANUFACTURING MARKET, BY TECHNOLOGY**

- 7.1 Introduction
- 7.2 Regolith Extraction Systems
- 7.3 In-Situ Additive Manufacturing Systems
- 7.4 Electrolysis & Chemical Conversion
- 7.5 Autonomous Excavation Robots
- 7.7 In-Situ Fuel Production Modules

## **8 GLOBAL IN-SITU RESOURCE UTILISATION (ISRU) MANUFACTURING MARKET, BY APPLICATION**

- 8.1 Introduction
- 8.2 Habitat Construction
- 8.3 Fuel Production for Spacecraft
- 8.4 Life Support & Oxygen Generation

- 8.5 Power Infrastructure Deployment
- 8.6 Scientific Infrastructure Development

## **9 GLOBAL IN-SITU RESOURCE UTILISATION (ISRU) MANUFACTURING MARKET, BY END USER**

- 9.1 Introduction
- 9.2 Space Agencies
- 9.3 Commercial Space Companies
- 9.4 Defense & Strategic Space Programs
- 9.5 Space Mining Startups
- 9.6 Research Institutions

## **10 GLOBAL IN-SITU RESOURCE UTILISATION (ISRU) MANUFACTURING MARKET, BY GEOGRAPHY**

- 10.1 Introduction
- 10.2 North America
  - 10.2.1 US
  - 10.2.2 Canada
  - 10.2.3 Mexico
- 10.3 Europe
  - 10.3.1 Germany
  - 10.3.2 UK
  - 10.3.3 Italy
  - 10.3.4 France
  - 10.3.5 Spain
  - 10.3.6 Rest of Europe
- 10.4 Asia Pacific
  - 10.4.1 Japan
  - 10.4.2 China
  - 10.4.3 India
  - 10.4.4 Australia
  - 10.4.5 New Zealand
  - 10.4.6 South Korea
  - 10.4.7 Rest of Asia Pacific
- 10.5 South America
  - 10.5.1 Argentina
  - 10.5.2 Brazil

- 10.5.3 Chile
- 10.5.4 Rest of South America
- 10.6 Middle East & Africa
  - 10.6.1 Saudi Arabia
  - 10.6.2 UAE
  - 10.6.3 Qatar
  - 10.6.4 South Africa
  - 10.6.5 Rest of Middle East & Africa

## **11 KEY DEVELOPMENTS**

- 11.1 Agreements, Partnerships, Collaborations and Joint Ventures
- 11.2 Acquisitions & Mergers
- 11.3 New Product Launch
- 11.4 Expansions
- 11.5 Other Key Strategies

## **12 COMPANY PROFILING**

- 12.1 Astrobotic Technology
- 12.2 ispace
- 12.3 Intuitive Machines
- 12.4 Space Forge
- 12.5 OffWorld
- 12.6 Terran Orbital
- 12.7 Blue Origin
- 12.8 Astroscale
- 12.9 Lockheed Martin
- 12.10 Boeing
- 12.11 Honeybee Robotics
- 12.12 Airbus
- 12.13 Masten Space Systems
- 12.14 Planetary Resources
- 12.15 NASA
- 12.16 Deep Space Industries
- 12.17 Foundation

## List Of Tables

### LIST OF TABLES

Table 1 Global In-situ Resource Utilisation (ISRU) Manufacturing Market Outlook, By Region (2024-2032) (\$MN)

Table 2 Global In-situ Resource Utilisation (ISRU) Manufacturing Market Outlook, By Resource Type (2024-2032) (\$MN)

Table 3 Global In-situ Resource Utilisation (ISRU) Manufacturing Market Outlook, By Lunar Regolith (2024-2032) (\$MN)

Table 4 Global In-situ Resource Utilisation (ISRU) Manufacturing Market Outlook, By Martian Soil & Minerals (2024-2032) (\$MN)

Table 5 Global In-situ Resource Utilisation (ISRU) Manufacturing Market Outlook, By In-Situ Metals & Alloys (2024-2032) (\$MN)

Table 6 Global In-situ Resource Utilisation (ISRU) Manufacturing Market Outlook, By Ice-Derived Water Resources (2024-2032) (\$MN)

Table 7 Global In-situ Resource Utilisation (ISRU) Manufacturing Market Outlook, By Atmospheric Gases (2024-2032) (\$MN)

Table 8 Global In-situ Resource Utilisation (ISRU) Manufacturing Market Outlook, By Platform (2024-2032) (\$MN)

Table 9 Global In-situ Resource Utilisation (ISRU) Manufacturing Market Outlook, By Lunar Platforms (2024-2032) (\$MN)

Table 10 Global In-situ Resource Utilisation (ISRU) Manufacturing Market Outlook, By Martian Platforms (2024-2032) (\$MN)

Table 11 Global In-situ Resource Utilisation (ISRU) Manufacturing Market Outlook, By Asteroid Mining Stations (2024-2032) (\$MN)

Table 12 Global In-situ Resource Utilisation (ISRU) Manufacturing Market Outlook, By Orbital ISRU Facilities (2024-2032) (\$MN)

Table 13 Global In-situ Resource Utilisation (ISRU) Manufacturing Market Outlook, By Lagrange Point Stations (2024-2032) (\$MN)

Table 14 Global In-situ Resource Utilisation (ISRU) Manufacturing Market Outlook, By Deep-Space Manufacturing Hubs (2024-2032) (\$MN)

Table 15 Global In-situ Resource Utilisation (ISRU) Manufacturing Market Outlook, By Technology (2024-2032) (\$MN)

Table 16 Global In-situ Resource Utilisation (ISRU) Manufacturing Market Outlook, By Regolith Extraction Systems (2024-2032) (\$MN)

Table 17 Global In-situ Resource Utilisation (ISRU) Manufacturing Market Outlook, By In-Situ Additive Manufacturing Systems (2024-2032) (\$MN)

Table 18 Global In-situ Resource Utilisation (ISRU) Manufacturing Market Outlook, By

Electrolysis & Chemical Conversion (2024-2032) (\$MN)

Table 19 Global In-situ Resource Utilisation (ISRU) Manufacturing Market Outlook, By Autonomous Excavation Robots (2024-2032) (\$MN)

Table 20 Global In-situ Resource Utilisation (ISRU) Manufacturing Market Outlook, By In-Situ Fuel Production Modules (2024-2032) (\$MN)

Table 21 Global In-situ Resource Utilisation (ISRU) Manufacturing Market Outlook, By Application (2024-2032) (\$MN)

Table 22 Global In-situ Resource Utilisation (ISRU) Manufacturing Market Outlook, By Habitat Construction (2024-2032) (\$MN)

Table 23 Global In-situ Resource Utilisation (ISRU) Manufacturing Market Outlook, By Fuel Production for Spacecraft (2024-2032) (\$MN)

Table 24 Global In-situ Resource Utilisation (ISRU) Manufacturing Market Outlook, By Life Support & Oxygen Generation (2024-2032) (\$MN)

Table 25 Global In-situ Resource Utilisation (ISRU) Manufacturing Market Outlook, By Power Infrastructure Deployment (2024-2032) (\$MN)

Table 26 Global In-situ Resource Utilisation (ISRU) Manufacturing Market Outlook, By Scientific Infrastructure Development (2024-2032) (\$MN)

Table 27 Global In-situ Resource Utilisation (ISRU) Manufacturing Market Outlook, By End User (2024-2032) (\$MN)

Table 28 Global In-situ Resource Utilisation (ISRU) Manufacturing Market Outlook, By Space Agencies (2024-2032) (\$MN)

Table 29 Global In-situ Resource Utilisation (ISRU) Manufacturing Market Outlook, By Commercial Space Companies (2024-2032) (\$MN)

Table 30 Global In-situ Resource Utilisation (ISRU) Manufacturing Market Outlook, By Defense & Strategic Space Programs (2024-2032) (\$MN)

Table 31 Global In-situ Resource Utilisation (ISRU) Manufacturing Market Outlook, By Space Mining Startups (2024-2032) (\$MN)

Table 32 Global In-situ Resource Utilisation (ISRU) Manufacturing Market Outlook, By Research Institutions (2024-2032) (\$MN)

Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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