

ESETA: ESTABLISHING A GROUNDBREAKING FRAMEWORK FOR EUROPEAN SPACE ECONOMY STATISTICS

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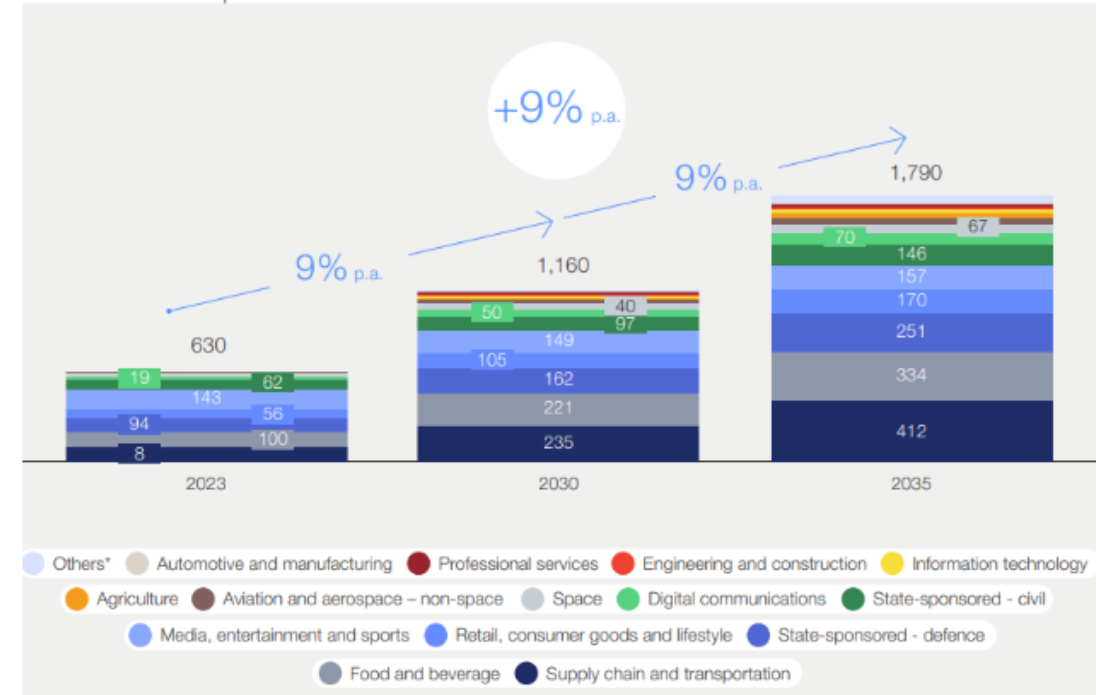


Towards a thematic account of the space economy

Rome (Italy), 9 December 2025

Starting Point

- **Space / Space Economy:**
 - Essential component of our everyday lives
 - Crucial element for economic growth & innovation
 - Expected CAGR of 9% until 2035 ~twice global GDP
- **But:**
 - Comprehensive and accurate overview of the space sector **still missing** in Europe – despite emphasis on evidenced-based decision-making at EU level =>
 - **Statistical evidence** across upstream & downstream space activities **key in identifying economic benefits and justifying requests for financial resources**



ESETA objectives

- **ESETA goal:** comprehensive view of the space sector in terms of size and value, relying on official macro-economic statistics and working with EU Member States
- **ESETA results** will allow economic impact assessments on the European space sector with unprecedented degree of granularity (including value added, employment and output)
- **Use of input-output economics** → Production and consumption of space-relevant goods and services will be traced, and their economic effects quantified
- ESETA defines space economy in terms of statistical codes (**NACE & CPA**)
- The project focuses on the **upstream** but also **downstream** part (not the space-derived) following the OECD definition (see [OECD Handbook on Measuring the Space Economy](#))
- **Cooperation** with ISTAT has been fundamental in ESETA – involvement at technical level, harmonization of methodology at European level, key role of ASI



ESETA overview

□ Work Package 3 | Set of teams across the European space value chain

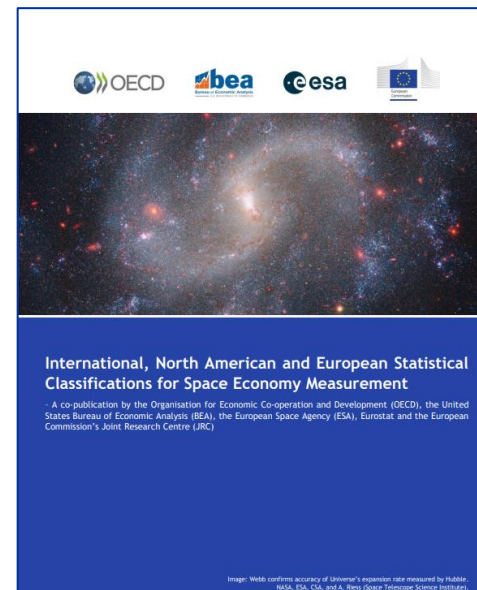
Ongoing



Establish national teams in volunteering Member States to test the applicability of methodology and definition developed in WP1 & WP2

- **WP1:** Statistical Working Paper published in December 2023:
<https://ec.europa.eu/eurostat/en/web/products-statistical-working-papers/w/ks-tc-23-497>

- **WP2:** Publication of **first-ever list of statistical codes** to measure the space economy by Eurostat, JRC, ESA, OECD and US-BEA released in December 2023:
<https://ec.europa.eu/eurostat/en/web/products-statistical-working-papers/w/ks-tc-23-496>



STATISTICAL CODES TO DEFINE THE SPACE ECONOMY | 26

Table 4 European NACE and CPA codes for space activities

NACE four-digit	NACE description	CPA six-digit	CPA description
C - Manufactured products			
20.11	Manufacture of industrial gases	20.11.11	Hydrogen, argon, rare gases, nitrogen and oxygen
		20.11.13	Liquid air and compressed air
		20.11.99	Sub-contracted operations as part of manufacturing of industrial gases
25.11	Manufacture of metal structures and parts of structures	25.11.23	Other structures and parts of structures, plates, rods, angles, shapes and the like, of iron, steel or aluminium
		25.11.99	Sub-contracted operations as part of manufacturing of metal structures and parts of structures
25.29	Manufacture of other tanks, reservoirs and containers of metal	25.29.11	Reservoirs, tanks, vats and similar containers (other than for compressed or liquefied gas), of iron, steel or aluminium, of a capacity > 300 litres, not fitted with mechanical or thermal equipment
		25.29.12	Containers for compressed or liquefied gas, of metal
		25.29.99	Sub-contracted operations as part of manufacturing of tanks, reservoirs and containers of metal
25.61	Treatment and coating of metals	25.61.11	Metallic coating services of metal



First steps and results

- **As first step, focus on 100% space-related products and activities** (no share to be computed in these cases)
- **Use of Eurostat data:** PRODCOM for production; FIGARO balanced view of trade for exports and imports
- **December 2023:** trade for CPA 30.30.40 (spacecraft and their launch vehicles)
- **December 2024:** production and updated trade for CPA 30.30.40
- **January 2025:** trade for NACE 51.22 (space transport)

100% space-related products and activities

NACE 4 digits	Description
51.22	Space transport
CPA 6 digits	Description
30.30.40	Spacecraft (including satellites) and spacecraft launch vehicles
51.22.11	Space transport services for passengers
51.22.12	Space transport services for freight
52.23.20	Services incidental to space transportation
61.30.10	Satellite telecommunications services, except home programme distribution services via satellite

NACE statistical codes relate to activities

CPA codes relate to products (goods and services)



January 2025 results

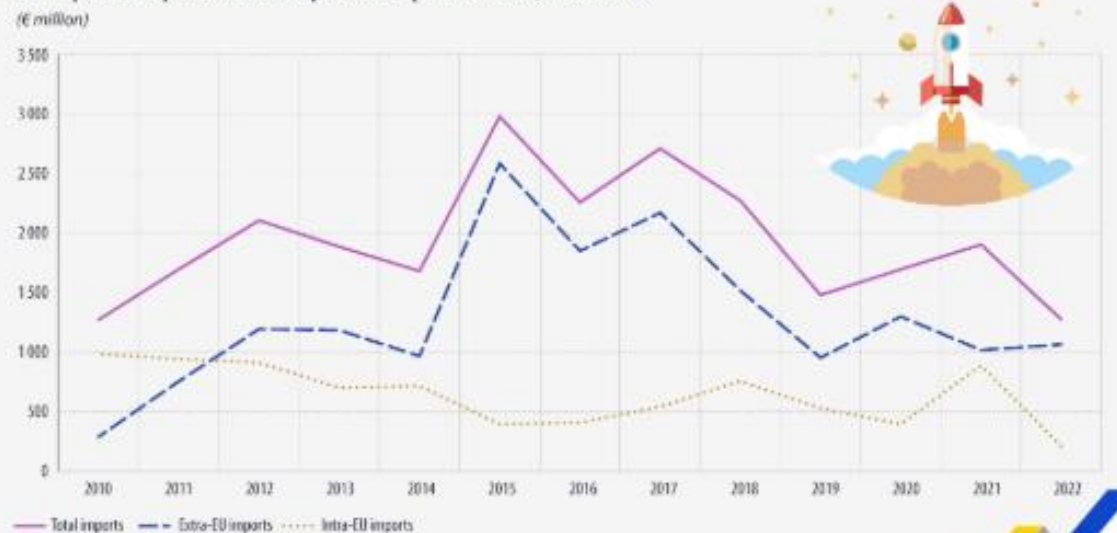
Spacecraft & space transport exports: €1 340 million



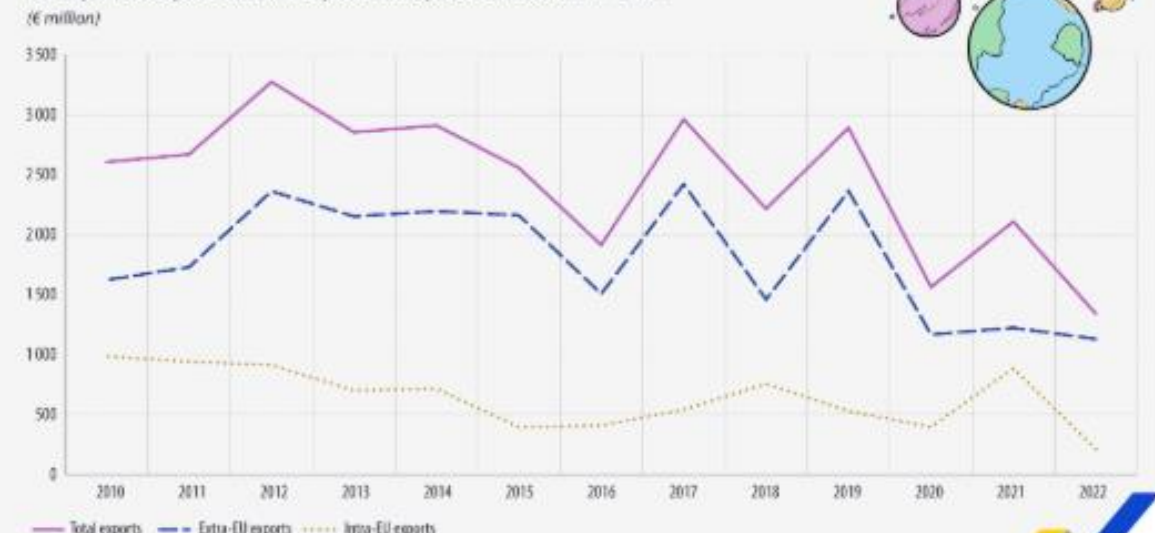
In 2022, EU exports of spacecraft and space transport services totalled €1 340 million after experiencing a 36% drop compared with 2021 (€2 108 million). In 2022, 84% of all exports, or €1 129 million, went to countries outside the EU.

- Results for CPA 30.30.40 + 51.22.11 and 51.22.12
- Export and import data for the spacecraft + space transport of passengers and freight
- Released at the occasion of the 17th European Space Conference
- [News item](#)

EU imports of spacecraft and space transport services, 2010-2022



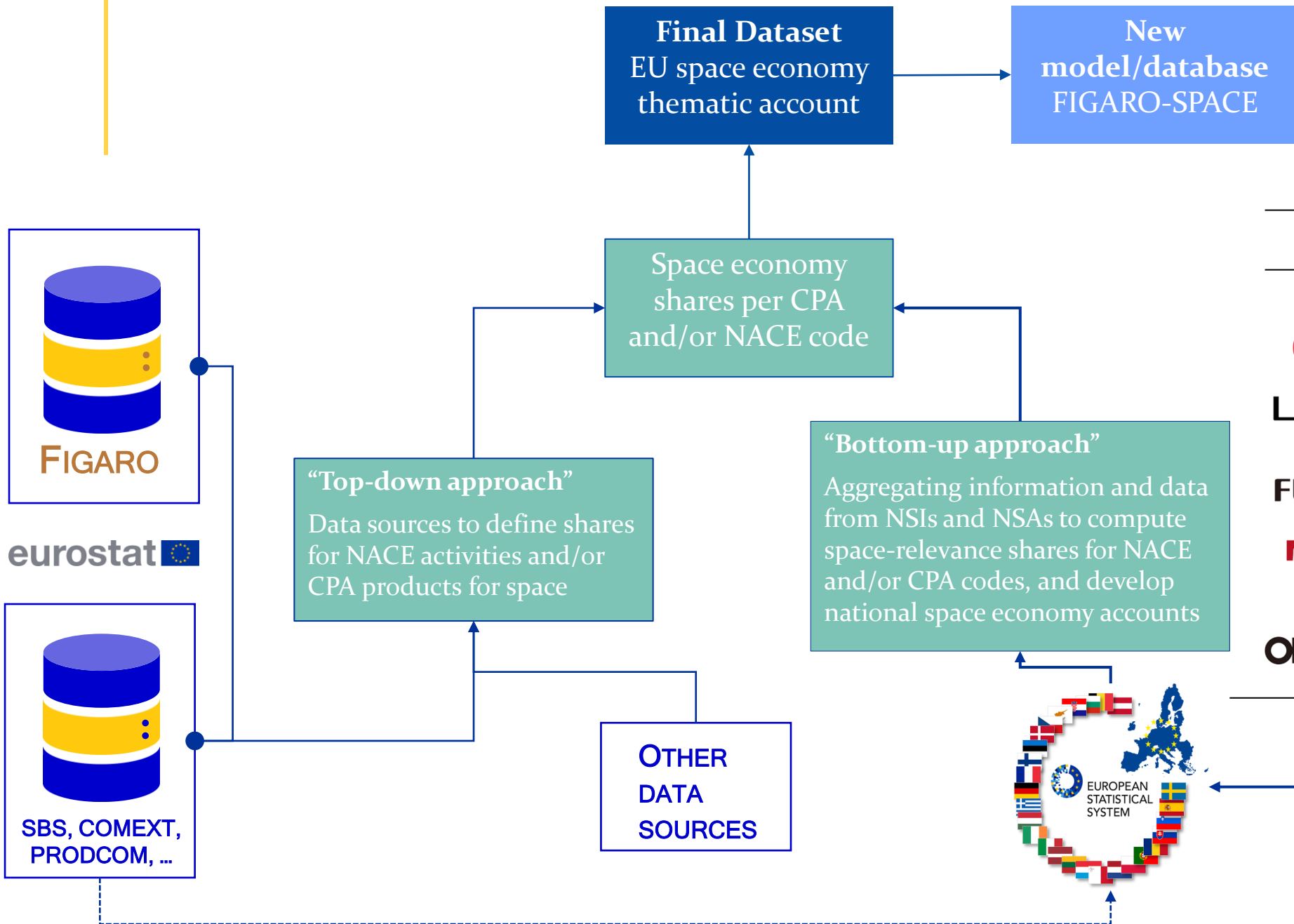
EU exports of spacecraft and space transport services, 2010-2022



Developments

- First-ever workshop involving both space and statistics experts, organised in Riga on 25 March 2025:
 - Importance of the ESETA project to contribute to **evidence-based policymaking**
 - Presentations of ongoing **national experiences**: Italy, Latvia, Denmark
 - Discussion on the list of 50 activities (NACE) and 220 products (CPA) relevant for the space economy in Europe – 2023 publication and [ShowVoc](#)
 - Proposed way forward based on two approaches in parallel (**bottom-up** and **top-down**)
- List of entities (private + public) active in the space sector :
 - List set up in cooperation with ESA, DEFIS, EUSPA, National Statistical Institutes and National Space Agencies (ministries/services) for all EU countries
 - Ongoing finetuning of the list





Space firms operating in the optical photographic industry (example)



Note: The company logos correspond to a random group of firms for explanatory purposes only.



	Industry											Final uses			
	A	B-E	C	F	G-I	J	K	L	M-N	O-Q	R-U	S1	P5	P6	Use
Industry	A														
	B-E	Manufacturing Non Space related													
	C	Manufacturing Space related													
	F														
	G-I											Consumption	Investment	Exports	Total use
	J														
	K														
	L														
	M-N														
	O-Q														
	R-U														
Gross Value Added	D1	Compensation of employees													
	B2A3G	Gross operating surplus													
	D2X3	Taxes less subsidies													
	P7	Imports													
	Output	Total Output													



FIGARO



Ongoing work

- Cooperation with volunteering countries:
 - **Spain** (INE – AEE) joined the project
 - **Latvia**, **Denmark** and **Italy** obtained first results
 - Some more countries to join soon using microdata linking / profiling: France, Estonia, Finland, the Netherlands, Portugal – Teamwork
- Cooperation with Eurostat microdata linking project
- Finetuning of the list of entities active in the space sector
- Release on the Eurostat website in January 2026:
 - Updated results for the 100% space-related products and activities, including more statistical codes for services
 - If possible, information on the share (e.g. range) of space-relevance for each activity / product



Thank you

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