



Lunar Market Watch — Sample Issue

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Format note: This is a sample issue showing the format and depth subscribers receive each month. The items below are illustrative of typical coverage; live issues analyse the month's actual developments and are tailored with a closing note for each subscriber's sector.

In This Issue

This month's briefing covers three developments that matter to suppliers and investors positioning for the lunar economy, this quarter's funding radar, and one number worth knowing. Reading time: about eight minutes.

1. CLPS task-order cadence — what a steady drumbeat means for component suppliers

What's happening: NASA's Commercial Lunar Payload Services programme continues to award task orders to its lander pool, sustaining a multi-mission pipeline through the late 2020s. Each awarded mission triggers a procurement wave at the prime and integrator level roughly 12–18 months before flight.

Why it matters to you: the window to be designed-in for a given mission closes early. If you supply components, the conversation with a lander prime needs to happen at task-order award, not at mission announcement. Suppliers waiting for "the lunar market to mature" are systematically missing the design-in windows that exist now.

Watch next: which primes win the next round of orders — each award reshuffles which supply chains are actively buying.

2. ESA's Argonaut programme — the geographic-return opportunity for UK and European firms

What's happening: ESA's Argonaut lunar lander programme continues moving through its development phases, with industrial work packages distributed across member states under ESA's geographic-return rules.

Why it matters to you: geographic return means UK-based content is actively *sought*, not merely tolerated — a structural advantage no US-facing supply chain offers. For firms not yet space-qualified, ESA technology programmes (GSTP, TDE) remain the most accessible co-funding route for component qualification.

Watch next: upcoming invitations to tender on the ESA-STAR portal tied to Argonaut subsystem packages.

3. Regulatory drumbeat — Accords-derived clauses appearing in supplier flow-downs

What's happening: as Artemis-aligned procurement matures, requirements rooted in the Artemis Accords — registration data provision, debris-mitigation documentation, transparency on provenance — are increasingly appearing as standard flow-down clauses in Tier 2/3 supplier contracts.

Why it matters to you: compliance is becoming a pre-bid screening criterion rather than a post-award formality. Firms with export-control programmes and ready-made data packs clear supplier onboarding in weeks; those without lose bids they never knew they were ruled out of.



Watch next: whether UK licensing reform consultations introduce changes relevant to component-level data obligations.

Funding Radar — This Quarter

Opportunity	Who it suits	Status	Indicative deadline
UKSA technology programme call	UK firms qualifying components for space environments	Illustrative — live issues track real calls	Q3 2026
ESA GSTP / TDE cycle	European suppliers seeking co-funded qualification	Illustrative	Rolling
Innovate UK space competition	SMEs with dual-use technology	Illustrative	Q3 2026

Live issues list actual open calls with deadlines, indicative award sizes and an honest one-line fit assessment for your business.

One Number

12–18 months — the typical lead time between a lunar mission's task-order award and the closure of its component design-in window. Whatever your entry plan, it must be timed against this clock, not against launch dates.

Subscriber Note

In live issues, this closing section is tailored to your sector — two or three paragraphs connecting the month's developments to your specific products, capabilities and strategy. It is the part subscribers tell us they read first.

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