China’s Space Momentum: The Long March 10B Catch, a State-Curated Consortium, and a Bifurcating Market

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On 10 July 2026, China became only the second nation, after the United States, to recover an orbital-class booster under control, and the first anywhere to do so with a net rather than landing legs. The state-owned China Academy of Launch Vehicle Technology intends to re-fly the same stage before year’s end.

The engineering is novel, but the more consequential story is legal and commercial. Reusability is the mechanism through which SpaceX collapsed launch costs and captured most of the world’s orbital launches. Net capture removes landing-leg mass from the vehicle and shifts it to the recovery infrastructure, freeing payload and, if it scales, lowering cost per kilogram. A credible second source of low-cost, high-cadence launch would cause ripples across the commercial launch market.

A state-curated commercial base

The timing of the booster is not coincidental. On 1 July 2026, a body under the China State Administration of Science, Technology and Industry for National Defense published the membership of the national commercial space consortium established at China’s Space Day in April 2025. The roster runs to 271 vetted entities across nine groups, from launch and satellite manufacturing to ground segment and financial services. Because membership followed voluntary application and deliberate vetting, the list functions as a signal of

which players the state treats as serious and which domains it intends to back: direct-to-device and non-terrestrial networks as a full value chain, commercial human spaceflight, hypersonic spaceplanes, and orbital compute.

The membership captures the state-commercial hybrid that defines Chinese “new space,” pairing state-linked launch arms with venture-backed firms that have independently reached orbit, alongside satellite operators. Whilst officially a coordination mechanism for policy, standards, and supply-demand matching, China has not yet enacted a dedicated national space law and thus the consortium, paired with China National Space Administration’s November 2025 action plan on commercial space, operates as an interim instrument for steering the sector and curating its industrial base. For counterparties, it also clarifies which Chinese entities are established, state-endorsed, and, almost uniformly, dual-use.

Two blocs, two legal regimes

The same rocket technology that is used by the Long March 10B supports the Long March 10A, the vehicle designed to carry China’s crew spacecraft and lander to the Moon before 2030 and eventually to the International Lunar Research Station (“ILRS”). The ILRS, led by China and Russia, is the rival to the U.S.-led Artemis Accords. It has become a real consortium, drawing in about seventeen countries and international organizations and more than fifty research institutions, including Pakistan, the UAE, Senegal, Venezuela, and Turkey. The Artemis Accords, by comparison, have sixty-six signatories. Two camps are taking shape, each with its own rockets, partners, and view of the law.

Export control is the force consolidating them. The Wolf Amendment bars NASA from bilateral cooperation with China, while International Traffic in Arms Regulations and the Export Administration Regulations restrict the flow of launch, satellite, and component technology, turning bloc affiliation

into a threshold commercial decision. Entities wishing to work across both, as several Gulf states presently do, face a genuine compliance tightrope, sharpened by the dual-use character of the newly named Chinese consortium. Critically, Artemis and ILRS advance competing interpretations of the Outer Space Treaty's non-appropriation principle, of "safety zones," and of resource-utilization rights that China will begin to test in 2028.

The takeaway

China's momentum is compounding vis-à-vis a recovered booster, a crewed lunar architecture behind it, and a state-curated commercial base beneath it. The result is a structurally bifurcated market in which launch access, partnership eligibility, financing, insurance, and dispute resolution increasingly depend on which side of an export-control line a venture sits. For governments building space agencies and corporations structuring cross-border ventures, the decisive questions have become substantial questions of law.

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