

Global and Indian Geospatial Market and Economy

ABHISHEK KOTANGALE
Geospatial World



A smarter, more digital world must grasp the power of a map
~ Guardian

How Big Data And Analytics Are Transforming The Construction Industry
~ Forbes

Geospatial Analytics will Eat the World and You Won't Even Know it
~ Forbes

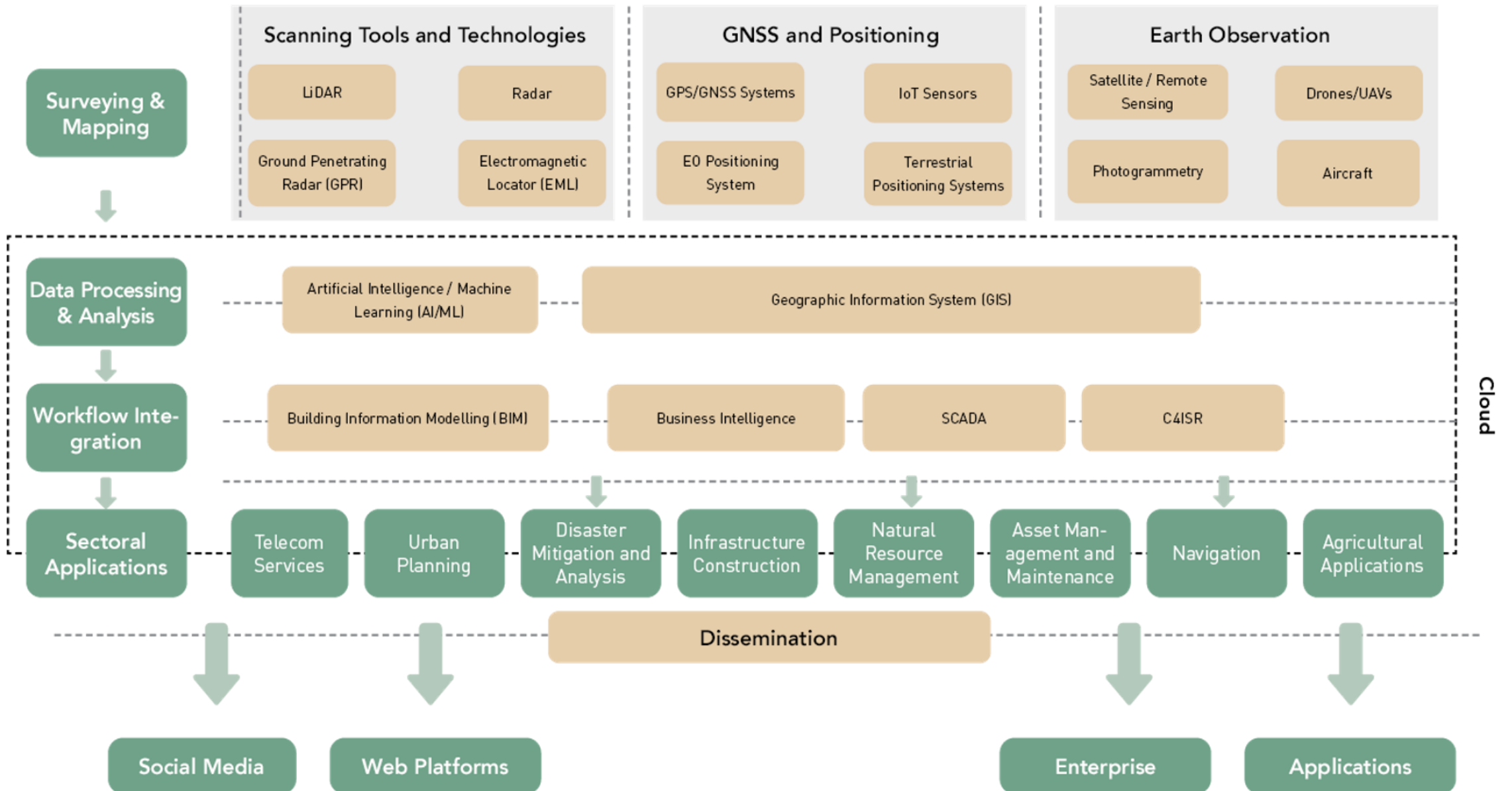
The World Economy Runs on GPS

~ Bloomberg Businessweek

How digital maps are changing the way we understand our world
~ Guardian

Why Location Intelligence Should Guide US Infrastructure Investments
~ Forbes

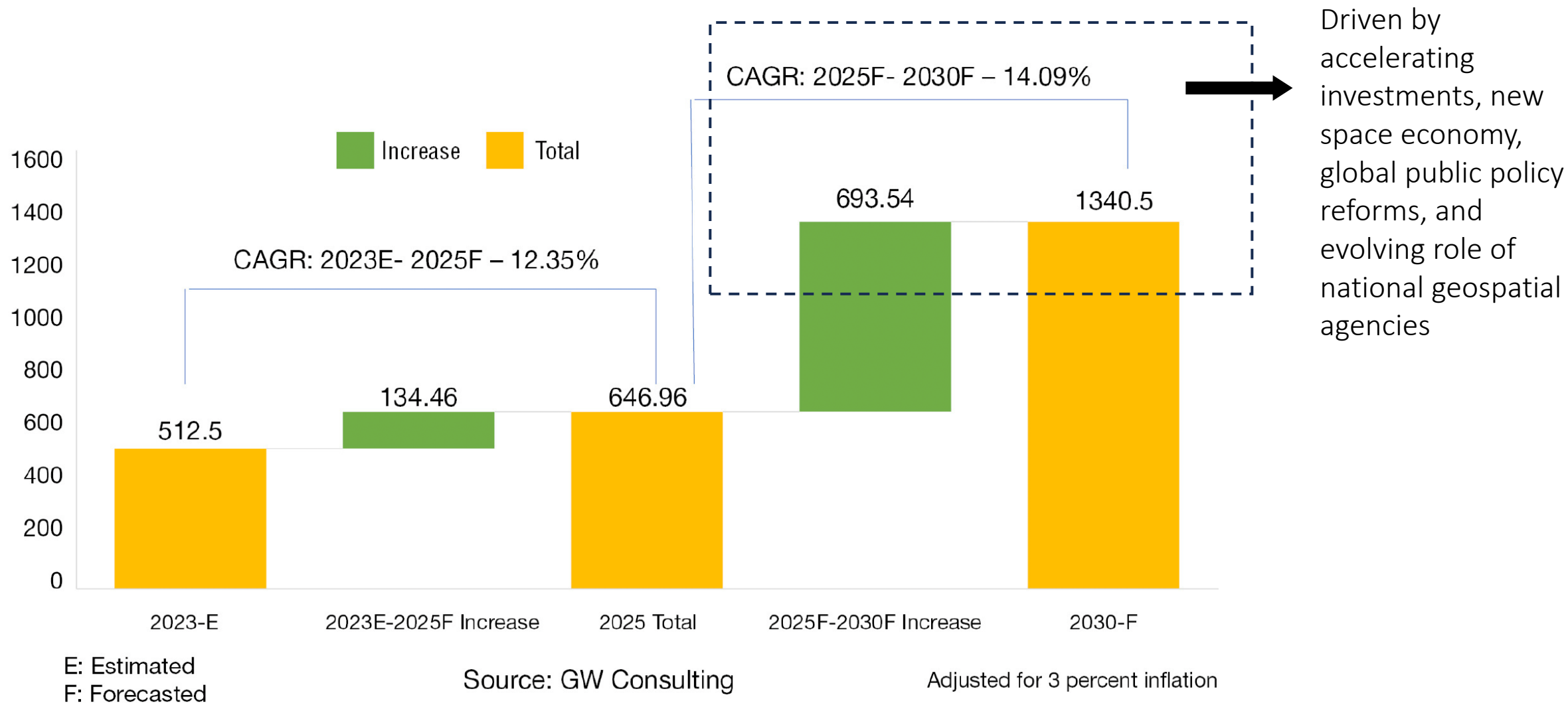
GEOSPATIAL INDUSTRY VALUE CHAIN



GLOBAL GEOSPATIAL INDUSTRY

MARKET SIZE, ECONOMY AND GROWTH FORECAST

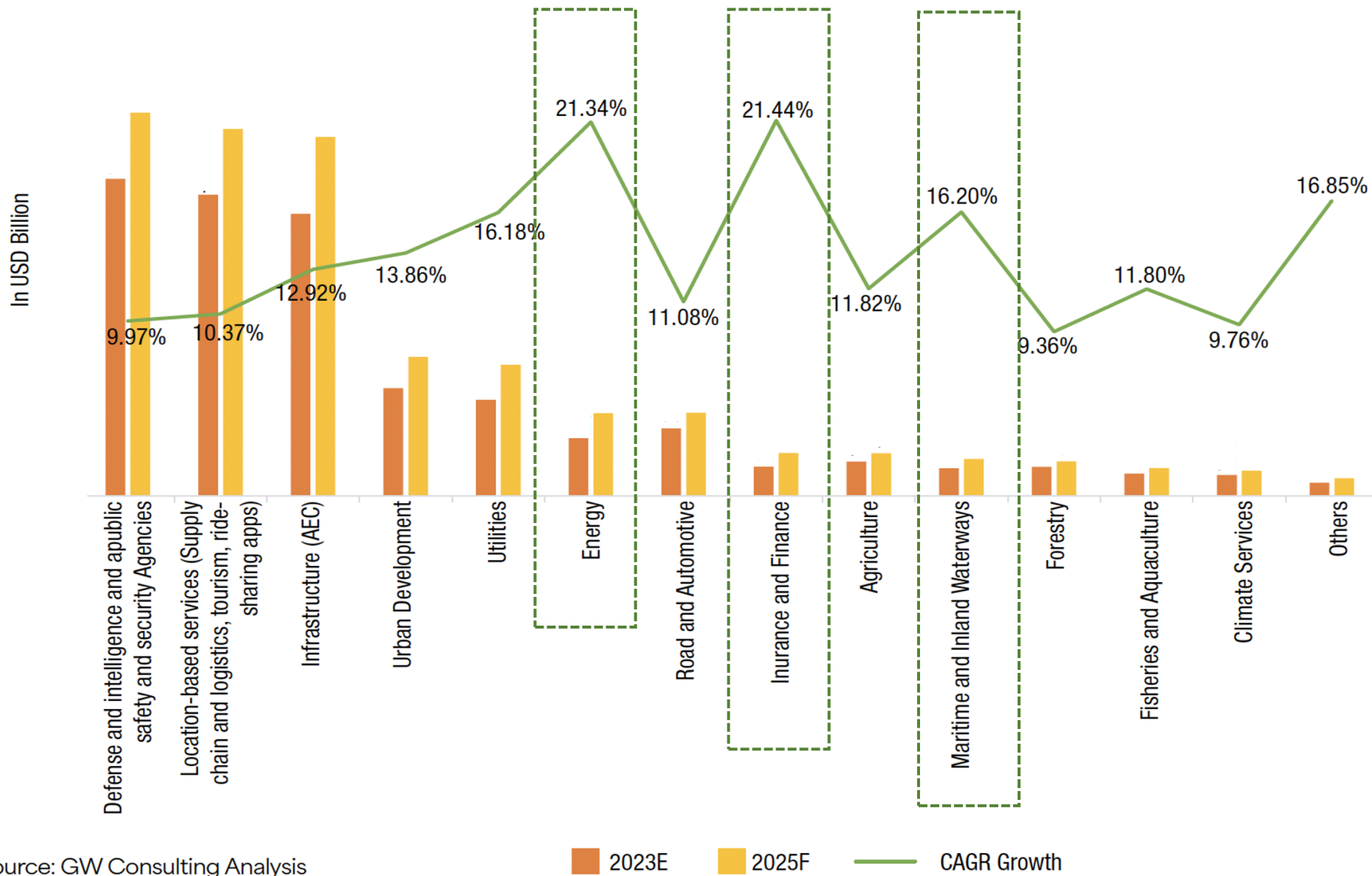
Global Geospatial Market Size and Forecast: 2023-2030



The background of the slide is a dark blue aerial view of a city, overlaid with a network of thin white lines and several semi-transparent location pin icons. The text is centered and reads:

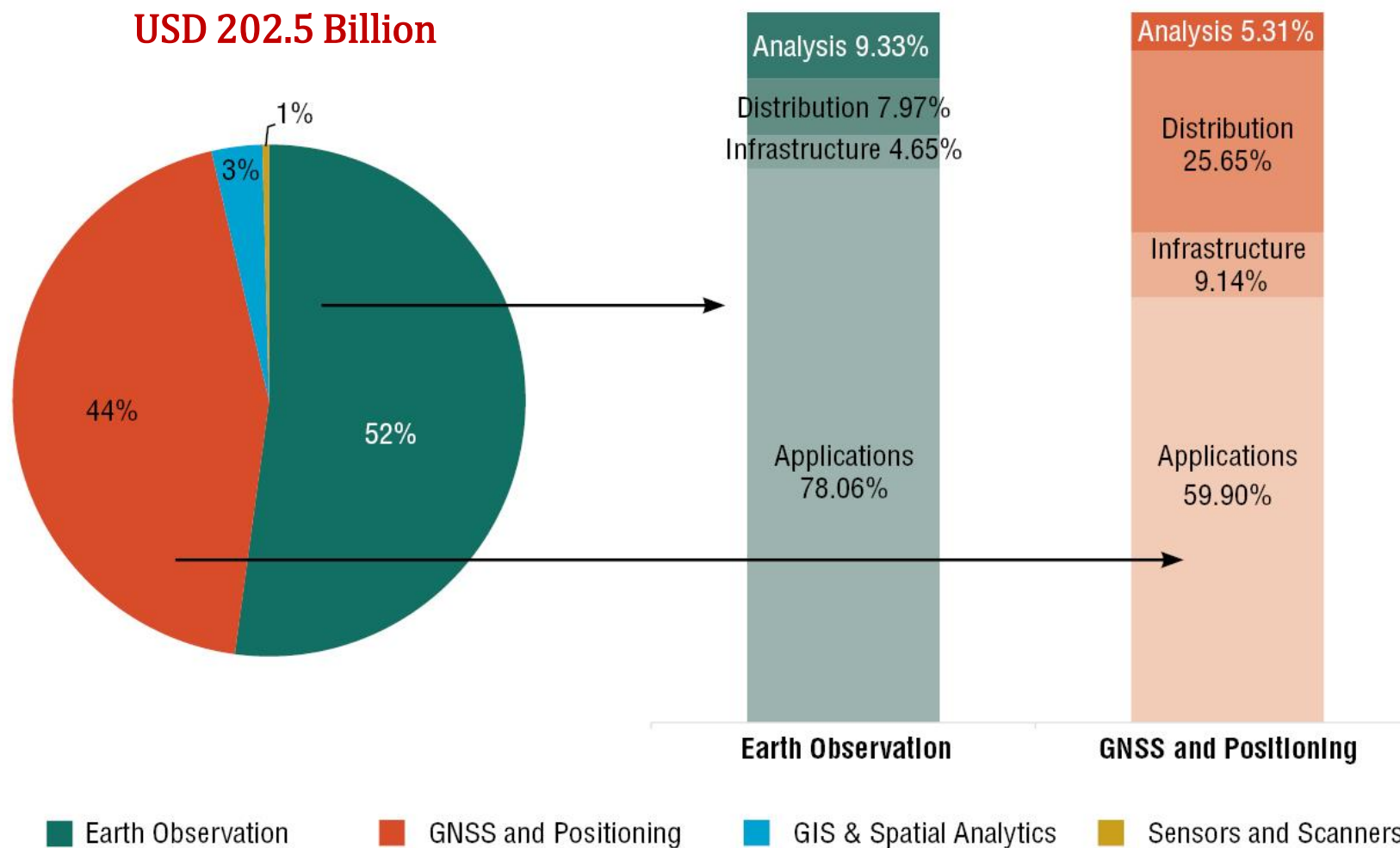
“Geospatial data has moved from the **realms of maps to knowledge** – wherein citizens and customers require data and solutions which are more current, accurate, with on-demand accessibility and in application ready formats.”

Sectoral Geospatial Market Size and Forecast: 2023-2025

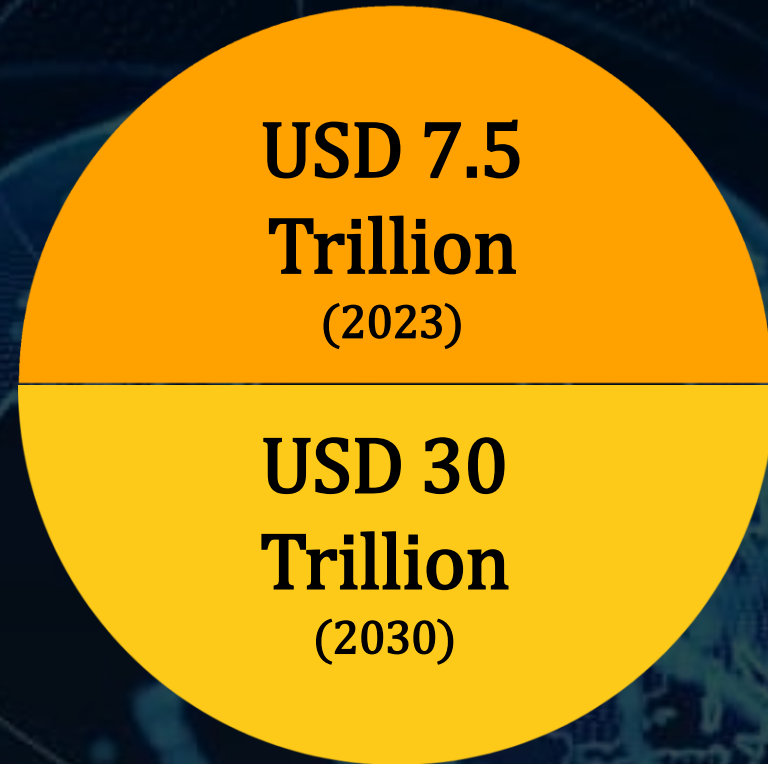


Source: GW Consulting Analysis

Investments (including IPO and SPAC) in Global Geospatial and Space Industry (2019-2022)



DIRECT ECONOMIC IMPACT OF GEOSPATIAL INFORMATION AND TECHNOLOGY: GLOBAL



\$0.66-\$1.44 Tn
Infrastructure



\$0.10-\$0.87 Tn
Utilities



\$0.36-\$1.16 Tn
Location-based Services



\$0.09-\$0.42 Tn
Energy



\$0.06-\$0.34 Tn
Agriculture



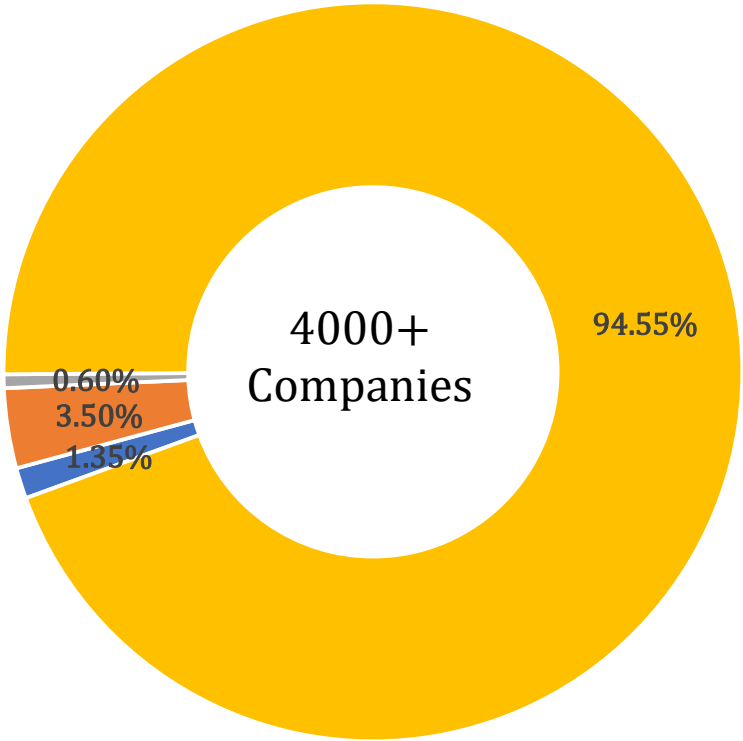
\$0.05-\$0.12 Tn
BFSI

INDIAN GEOSPATIAL INDUSTRY

MARKET SIZE, ECONOMY AND GROWTH FORECAST

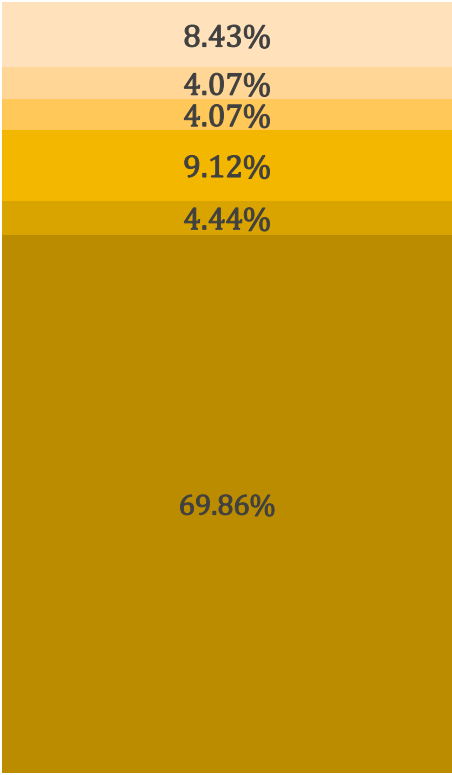
INDIAN GEOSPATIAL INDUSTRY PROFILE

Indian Geospatial Industry Profile
By Business Offerings



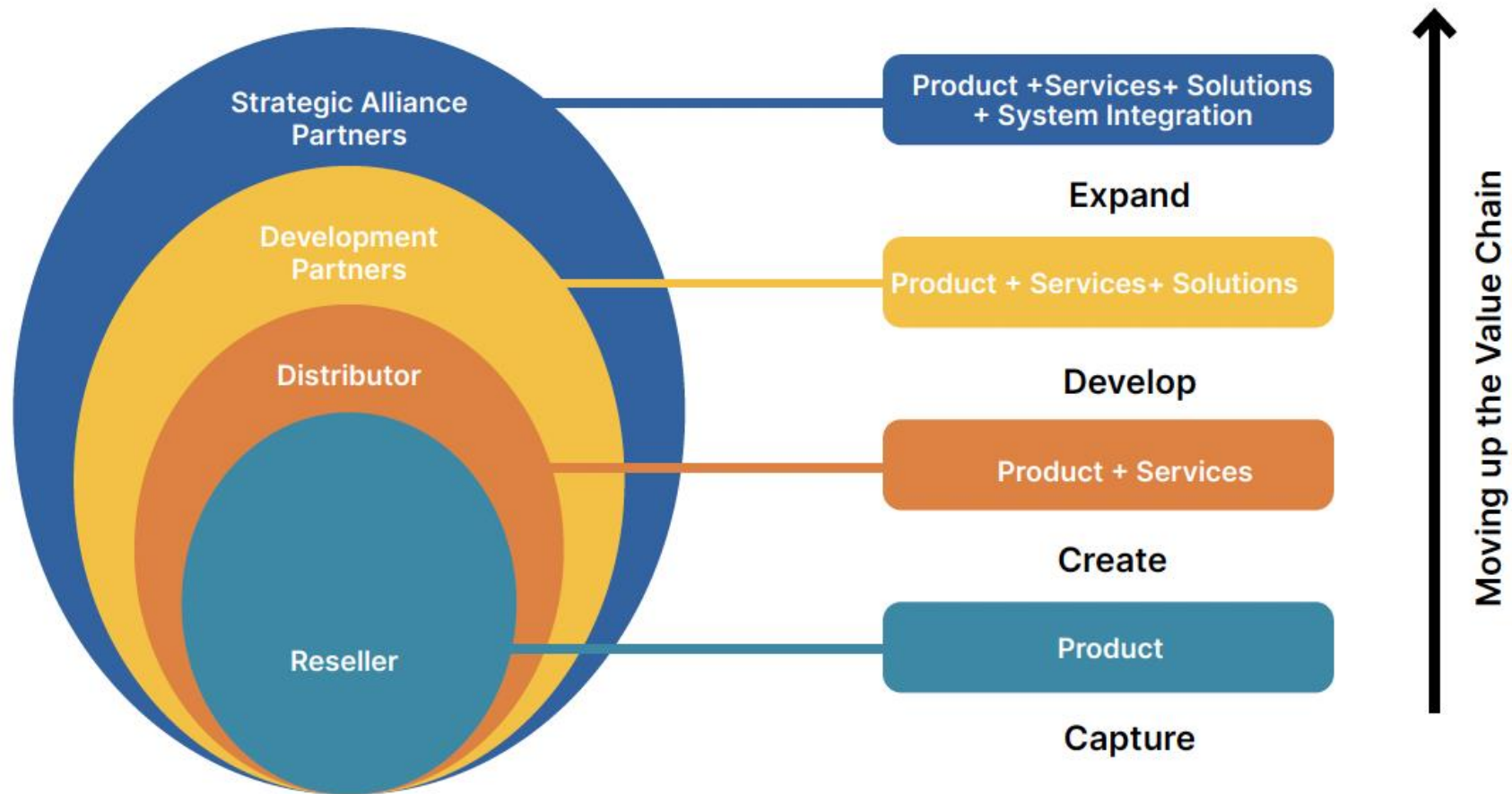
- Hardware Companies (including Foreign Companies)
- Software and Analytics
- Data Providers
- Services Companies

Indian Services Industry Profile
By Subsegments



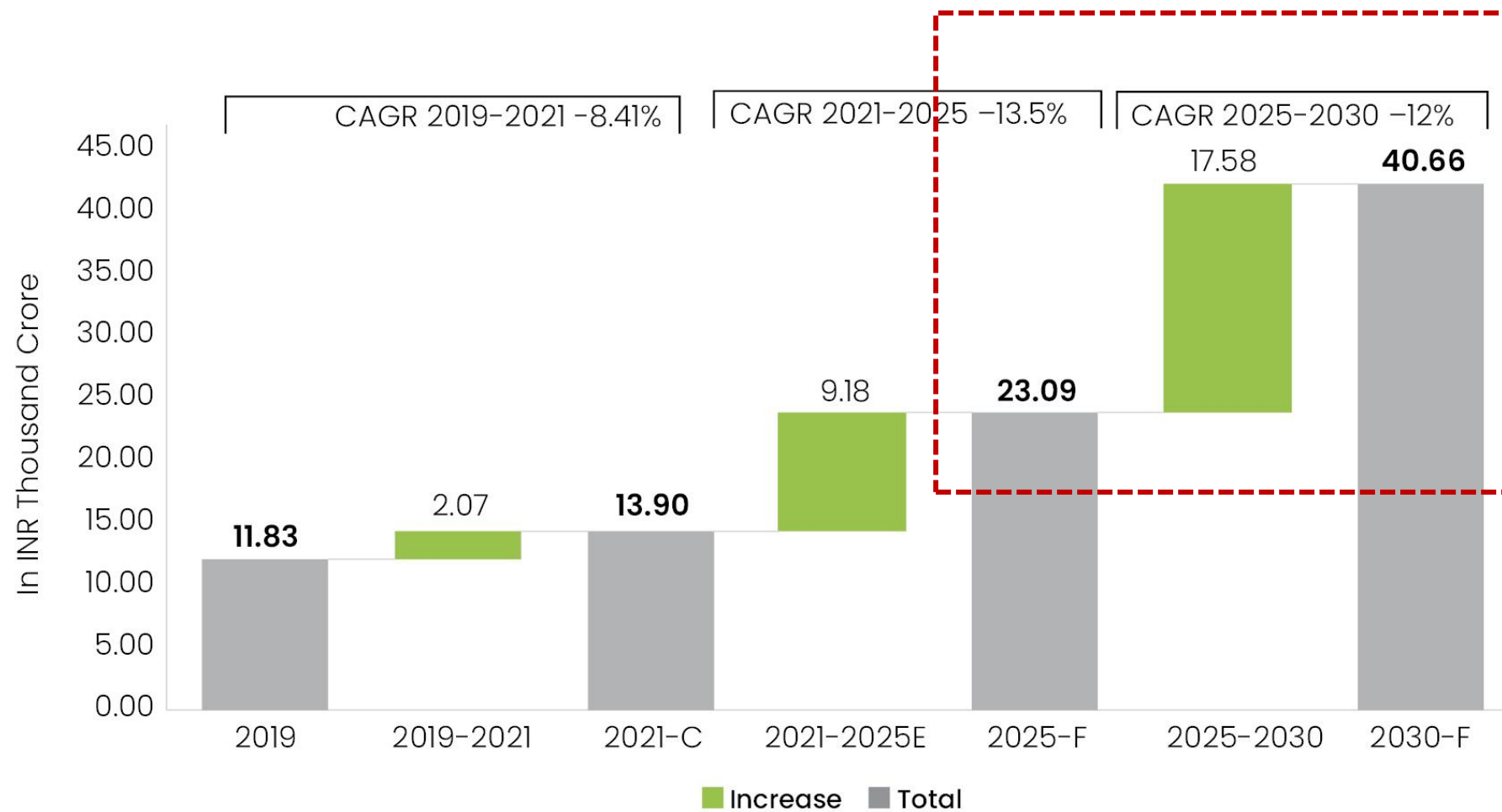
- Satellite Imagery Processing Services
- Mine Survey Services
- Hydrographic Survey
- GIS and BIM Services
- Subsurface Survey (GPR/EML)
- Land & Topographic Surveying

INDIA'S GEOSPATIAL INDUSTRY: FROM SERVICES TO SOLUTIONS THE FUTURE



Source: GW Consulting Analysis

INDIAN GEOSPATIAL MARKET SIZE AND FORECAST 2019-2030



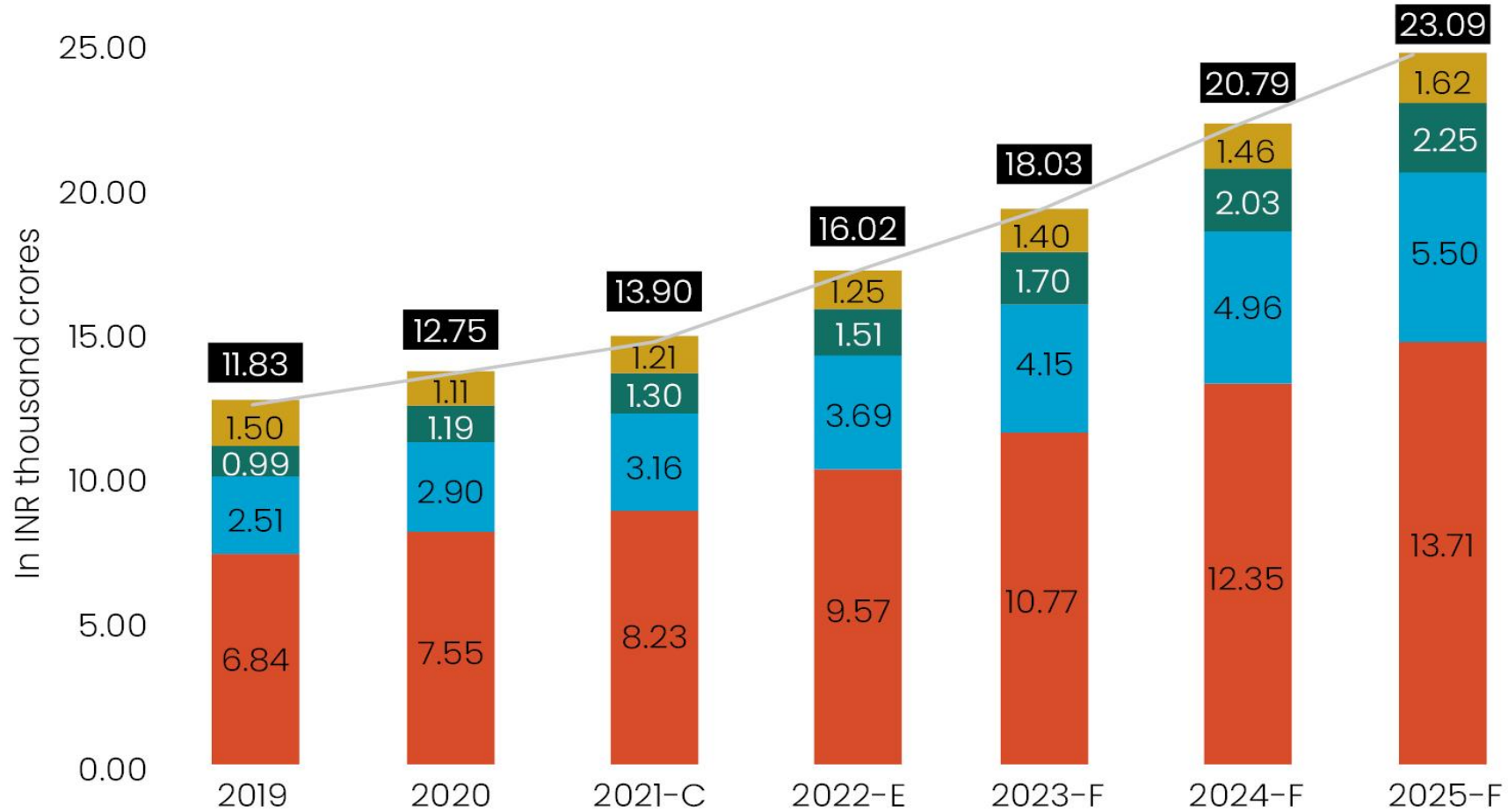
- Enhanced Impact of Guidelines for Geospatial Data
- Increasing embedment of geospatial across national programs
- System shift towards solutions industry from a services ecosystem; and
- Growth of indigenous companies

C-Corrected
F-Forecasted

Source: GW Consulting Analysis

Adjusted for 3% inflation for 2025-2030

INDIAN GEOSPATIAL MARKET SIZE AND FORECAST (2019-2025): BY TECHNOLOGY SEGMENTS



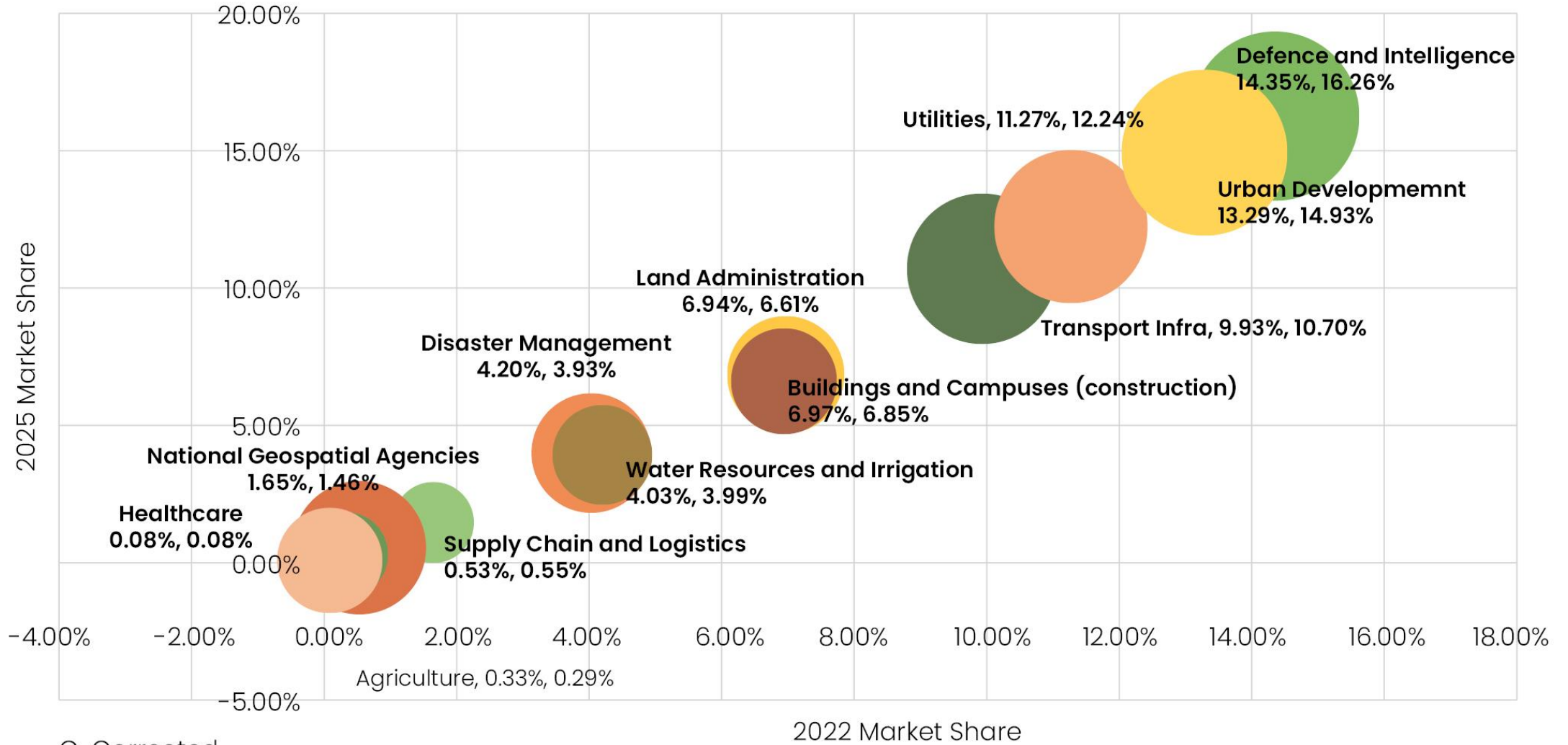
■ GNSS and Positioning
 ■ GIS and Spatial Analytics
 ■ Earth Observation
 ■ Scanning
 — Total

C-Corrected
 E -Estimated
 F-Forecasted

Source: GW Consulting Analysis

Adjusted for 3% inflation for 2025-2030

INDIAN GEOSPATIAL MARKET: BY SECTORAL MARKET SHARE (2022 & 2025)



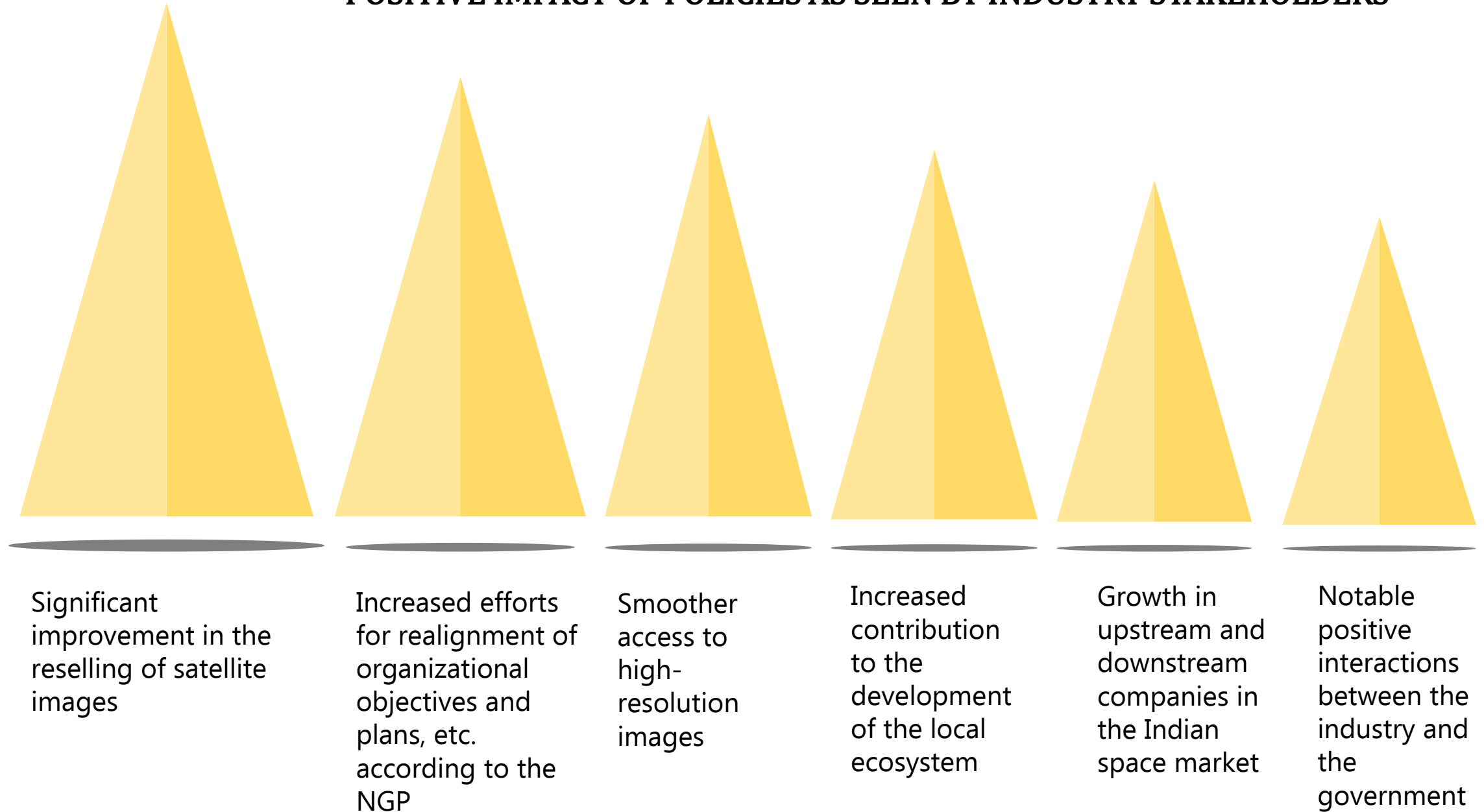
C-Corrected
E -Estimated
F-Forecasted

Source: GW Consulting Analysis

Adjusted for 3% inflation for 2025-2030

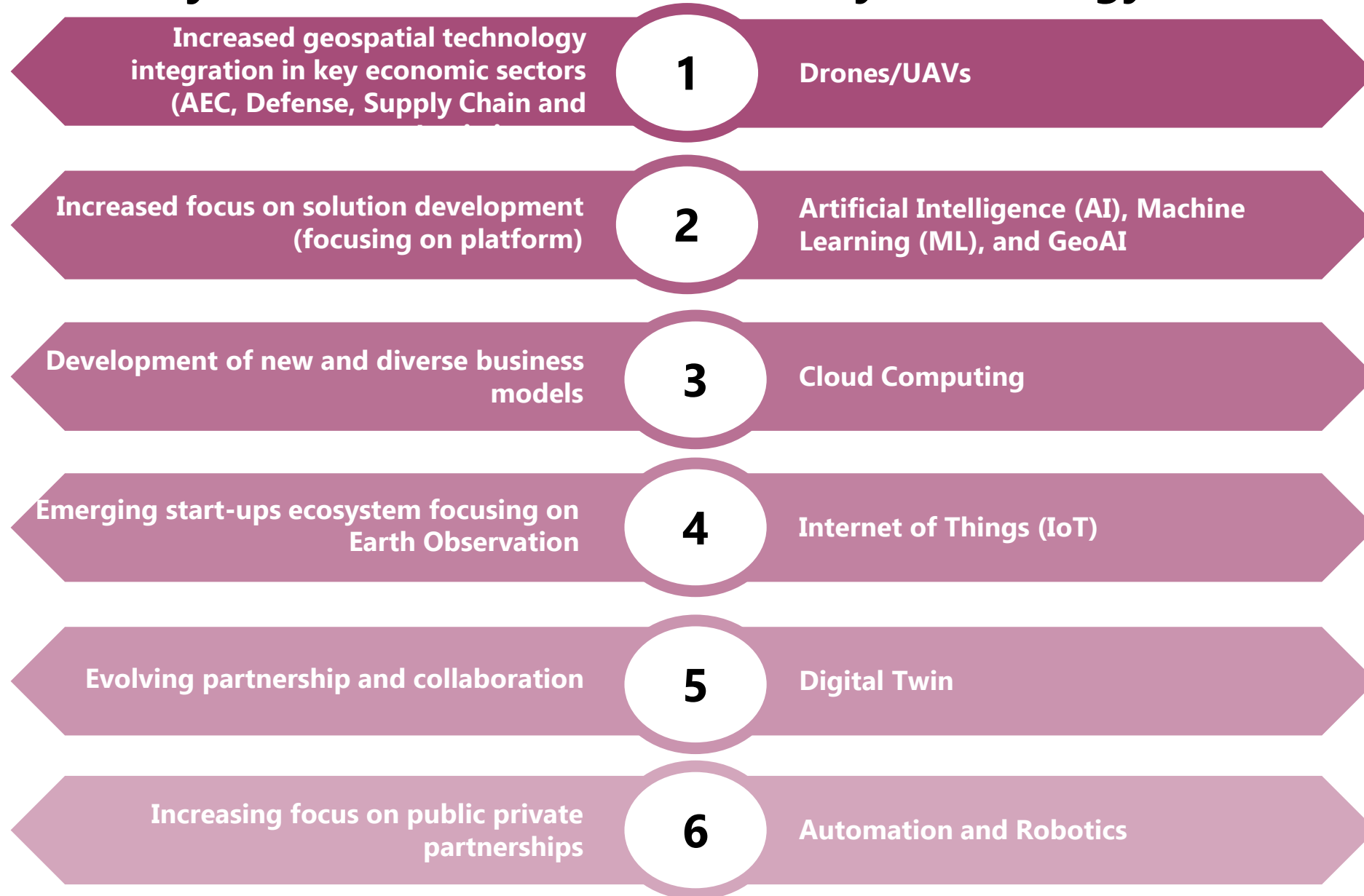
Note: Buildings and Campuses construction is taken into consideration separately than urban development.

POSITIVE IMPACT OF POLICIES AS SEEN BY INDUSTRY STAKEHOLDERS

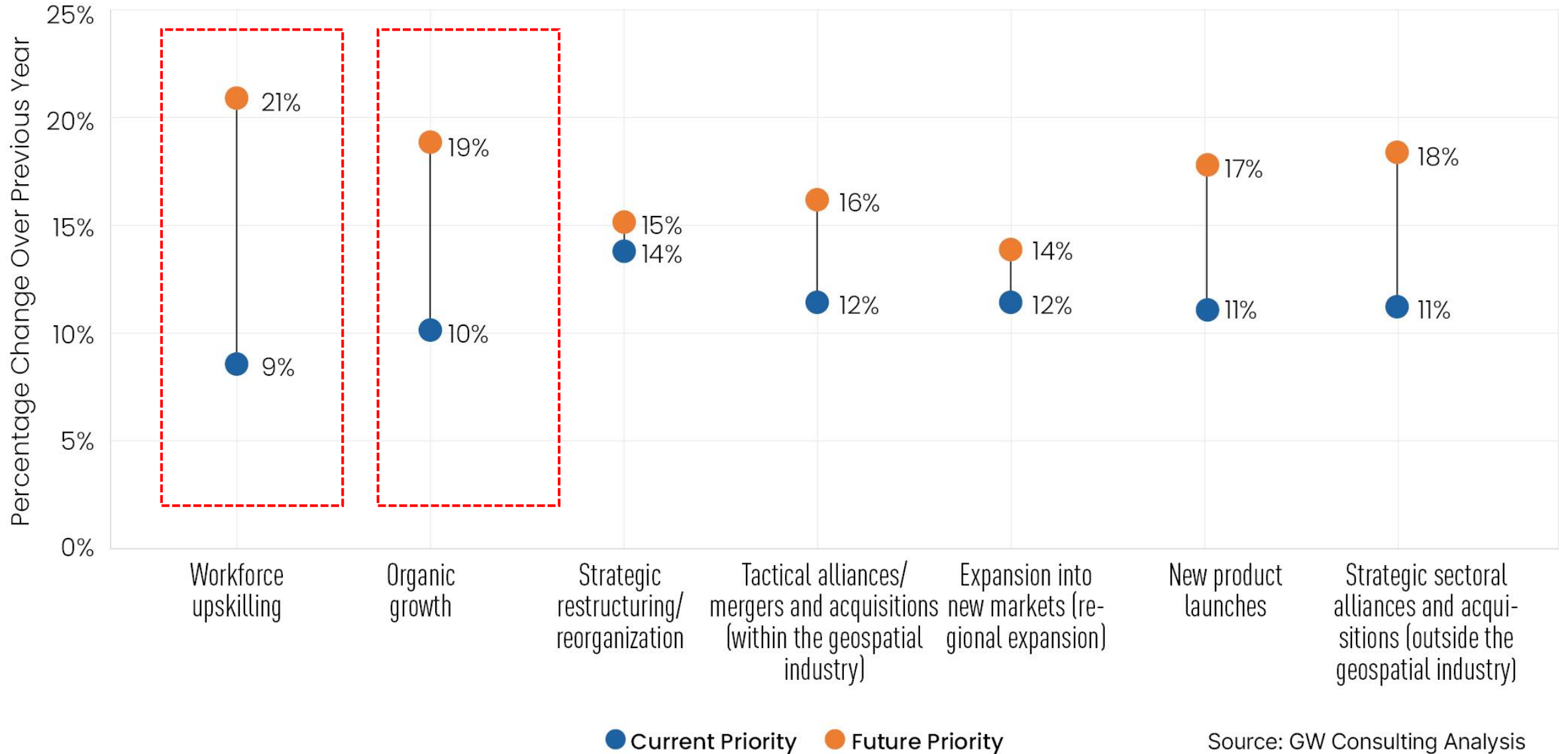


Key Market Drivers

Key Technology Trends

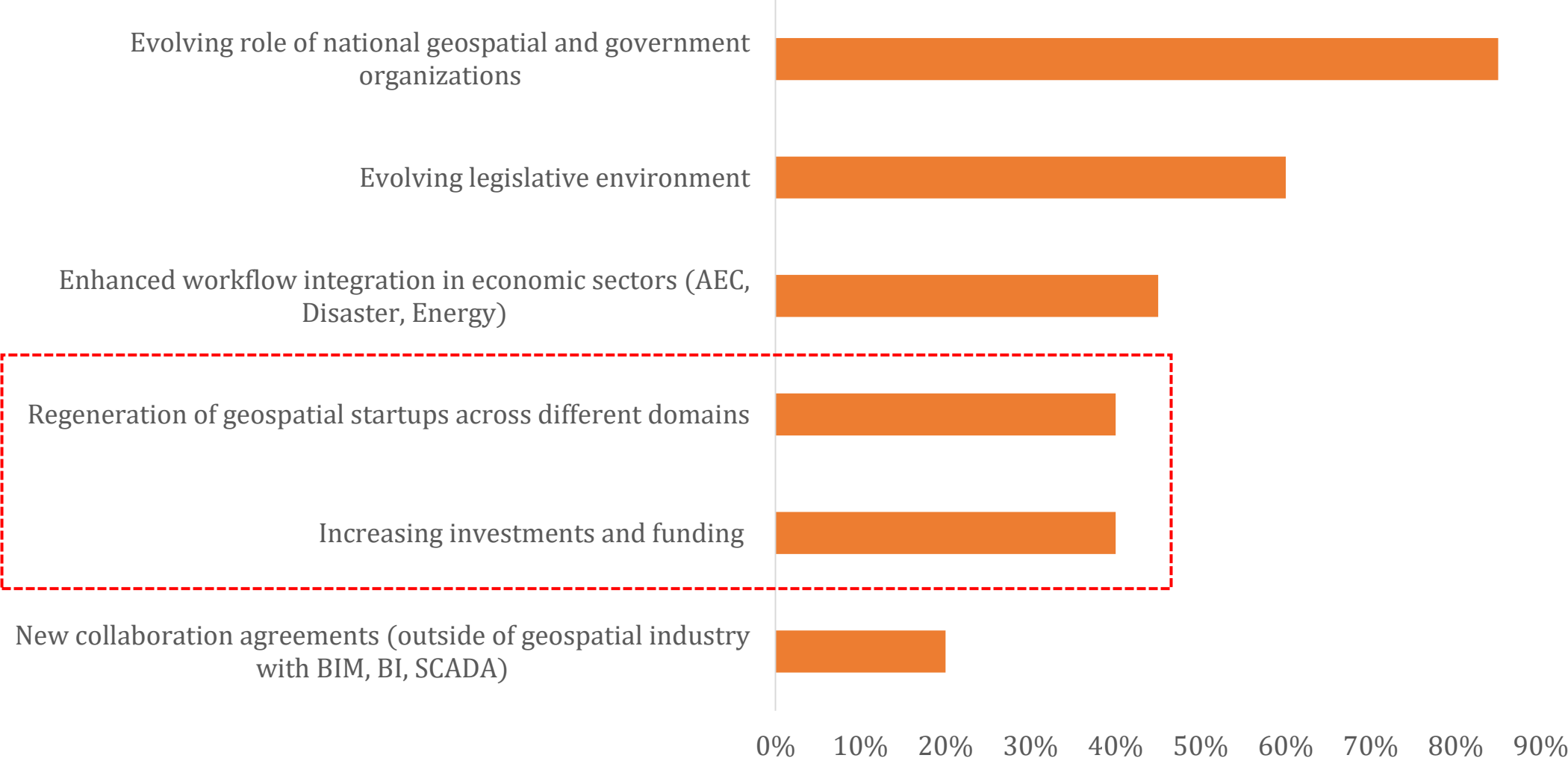


INDIAN GEOSPATIAL INDUSTRY'S BUSINESS PRIORITIES

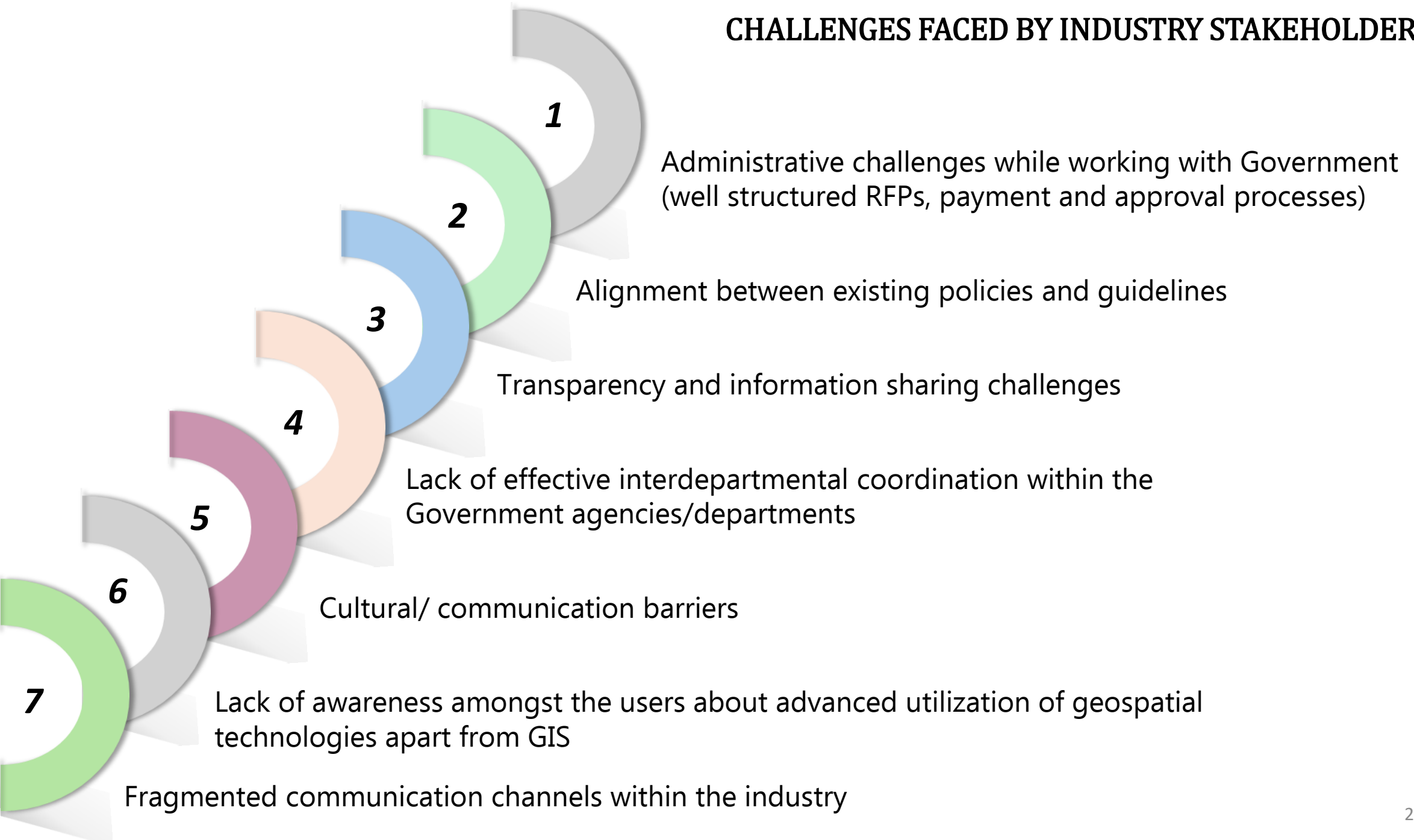


Source: GW Consulting Analysis

MARKET DRIVERS INFLUENCING THE GEOSPATIAL INDUSTRY



CHALLENGES FACED BY INDUSTRY STAKEHOLDERS



Funding and Investment Trends within Indian Geospatial (and space) Companies from 2019-2022

49

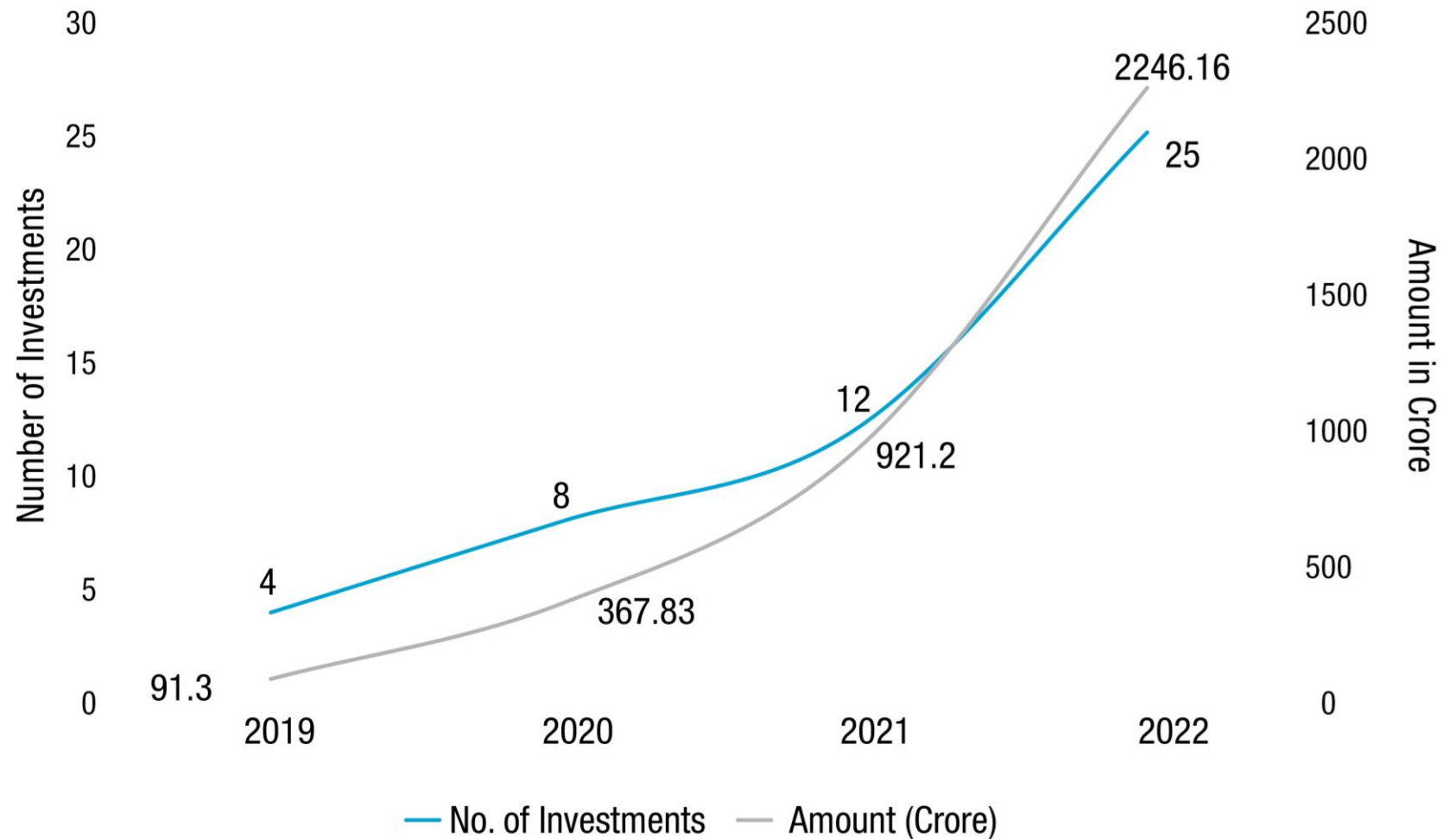
NO. OF INVESTMENTS
FROM 2019 TO 2022

3626.49 Cr

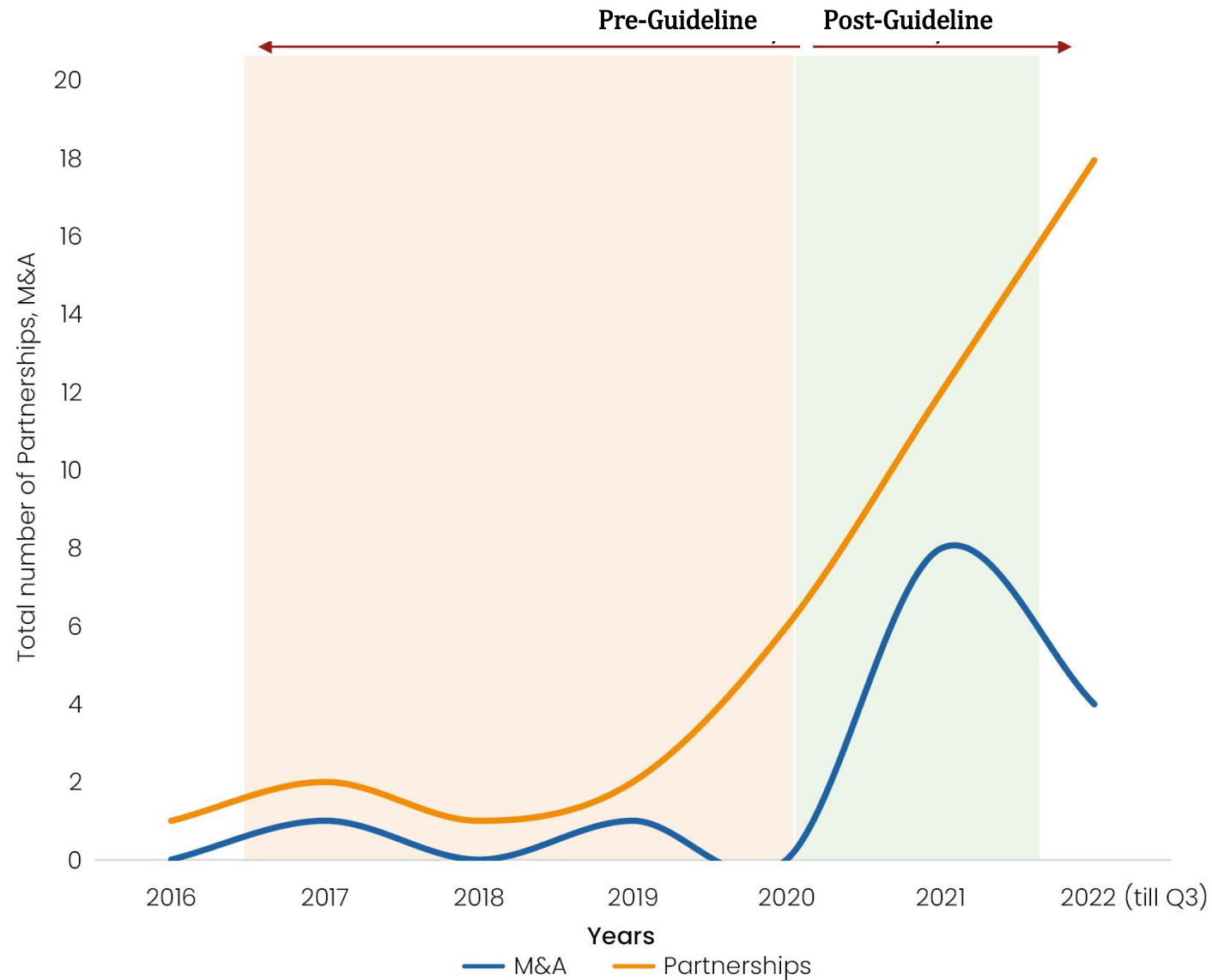
AMOUNT RAISED
FROM 2019-2022

98

TOTAL NUMBER OF
INVESTORS



Mergers and Acquisitions and Partnership Trends within Indian Geospatial Industry





Strategic, Tactical, and Commercial Approach towards
Robust, Resilient, and Growing
Indian space and geospatial industry

THANK YOU

GEOSPATIAL
WORLD

ADVANCING KNOWLEDGE FOR SUSTAINABILITY