## **Global and Indian Geospatial Market and Economy**

ABHISHEK KOTANGALE Geospatial World











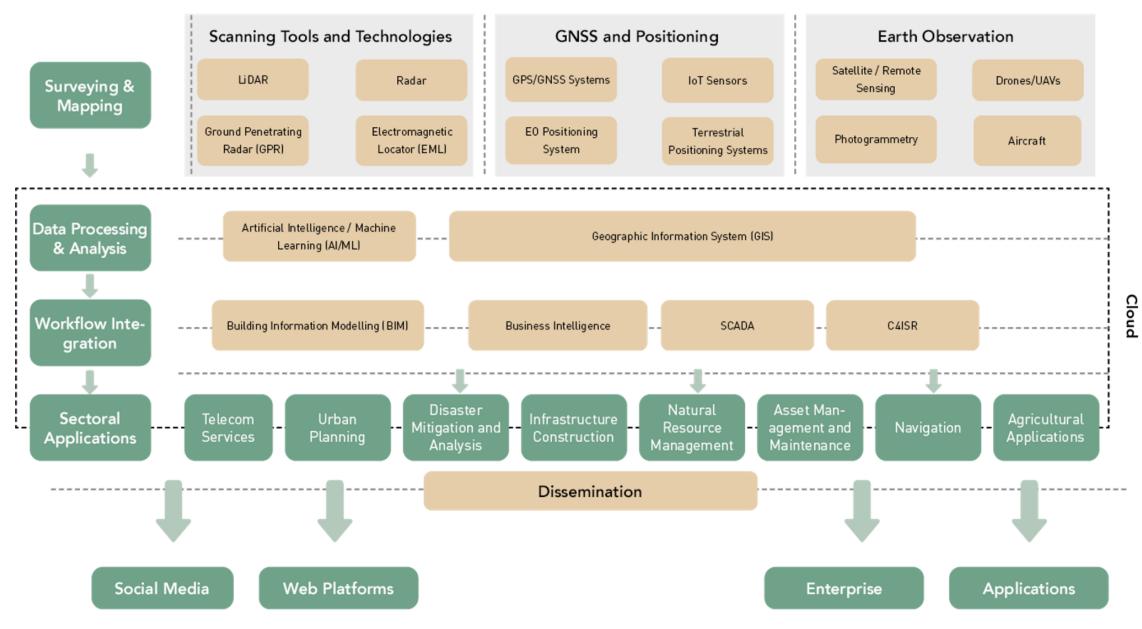




want to be starting games, being 2K @ sint see start mayer c santed to show the boss what I could A smarter, more digital world Geospatial Analytics will must grasp the power of a map Eat the World and You Won't Even Know it How Big Data And Analytics in hac habitasse 😤 🛠 Are Transforming The Construction Industry 101-TUT ~ Forbes A ng -d the bon II DT inceries more the hey dury he game fin for a Nasti scored Wox, wh balloy reasons why link we fay also a i also a purpo varifed by many selected is week the wes that Khan The World Economy Runs on GPS  $\sim$  Bloomberg Businessweek sphone contat - - a dimension orom inclim prevented the .... game fing Why Location Intelligence Should rebuilt Sec. 95.30<sup>3</sup> also a pur Guide US Infrastructure Investments How digital maps are changing the all the house way we understand our world ~ Guardian Alm Gulf, where few © Geospatial Media and Communications Pvt. Ltd.

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### **GEOSPATIAL INDUSTRY VALUE CHAIN**

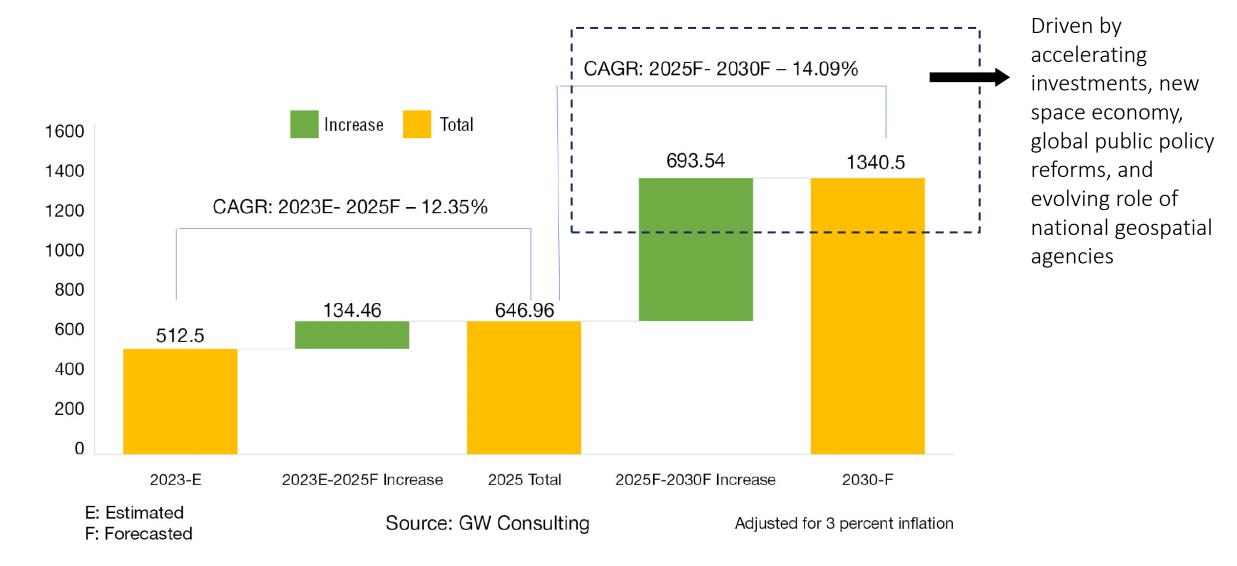


Source: GW Consulting Analysis<sup>3</sup>

## **GLOBAL GEOSPATIAL INDUSTRY**

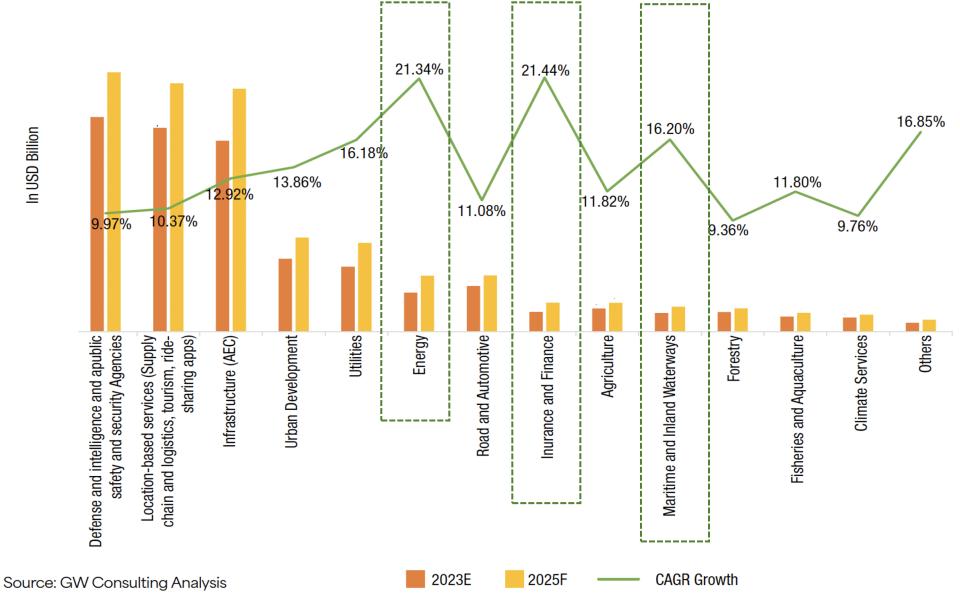
MARKET SIZE, ECONOMY AND GROWTH FORECAST

### **Global Geospatial Market Size and Forecast: 2023-2030**



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.

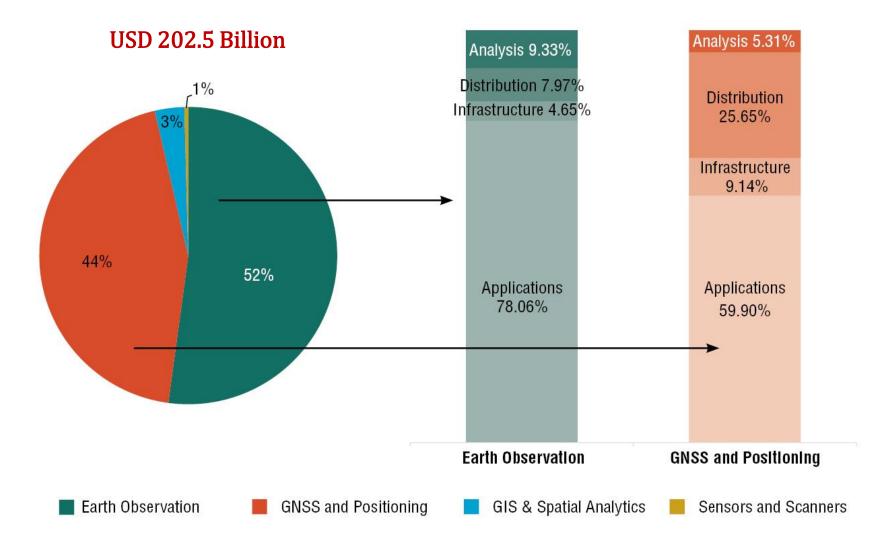
### Sectoral Geospatial Market Size and Forecast: 2023-2025



Source: GeoBuiz 23: Global Geospatial Industry Market Size, Forecast and Growth Trends Report 2023

GW CONSULTING

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



## DIRECT ECONOMIC IMPACT OF GEOSPATIAL INFORMATION AND TECHNOLOGY: GLOBAL

USD 7.5 Trillion (2023)

USD 30 Trillion (2030)



\$0.06-\$0.34 Tn Agriculture



**\$0.05- \$0.12 Tn** BFSI



\$0.66-\$1.44 Tn Infrastructure



**\$0.36-\$1.16 Tn** Location-based Services **7 ≳ §** ≅ ≅ ≅

**\$0.10-\$0.87 Tn** Utilities

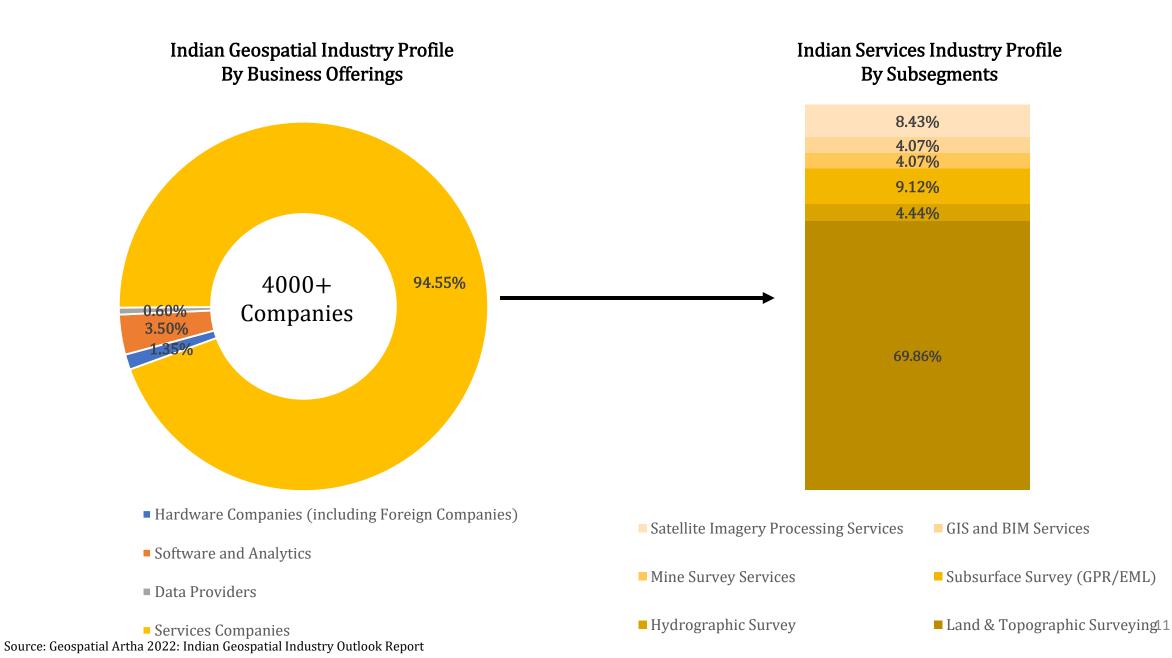


\$0.09-\$0.42 Tn Energy

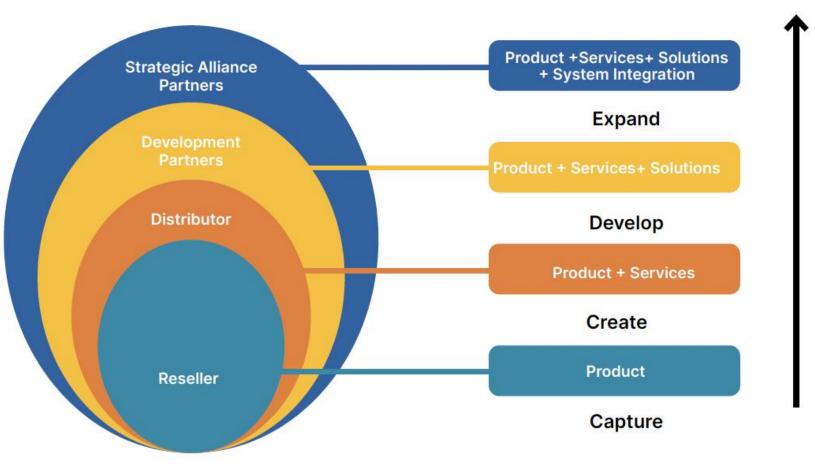
## **INDIAN GEOSPATIAL INDUSTRY**

MARKET SIZE, ECONOMY AND GROWTH FORECAST

#### **INDIAN GEOSPATIAL INDUSTRY PROFILE**



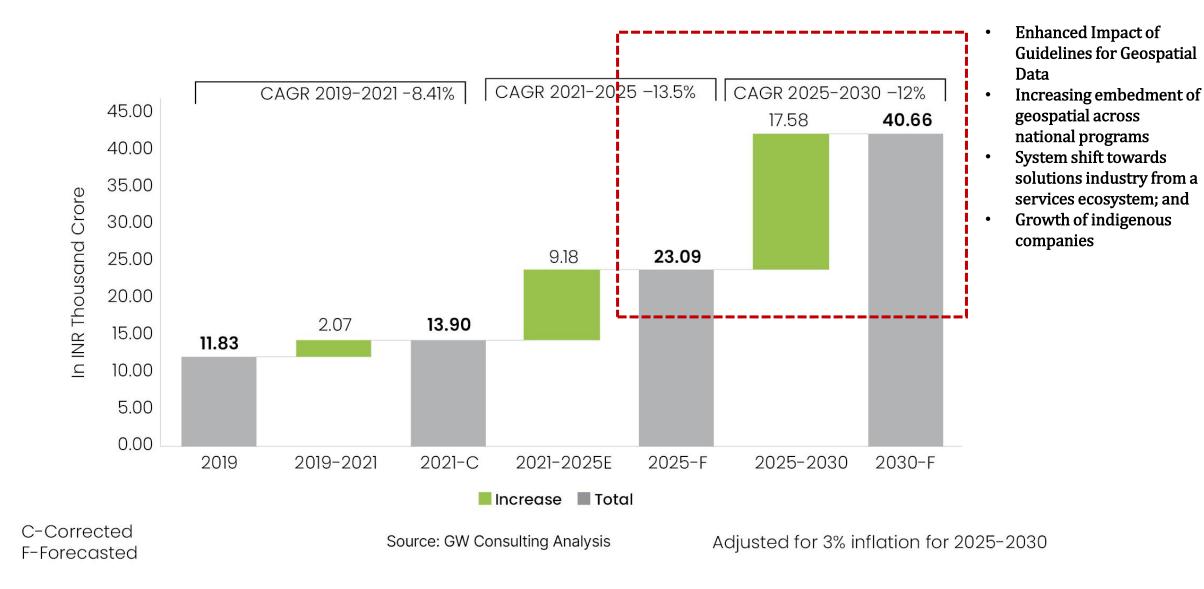
### INDIA'S GEOSPATIAL INDUSTRY: FROM SERVICES TO SOLUTIONS THE FUTURE



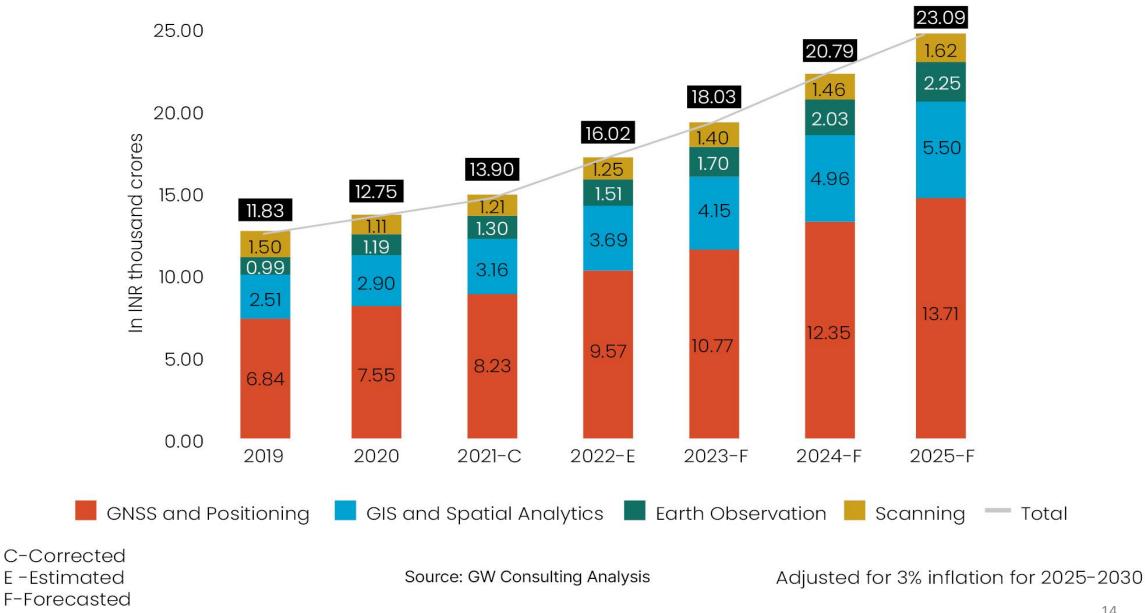
Moving up the Value Chain

Source: GW Consulting Analysis

#### **INDIAN GEOSPATIAL MARKET SIZE AND FORECAST 2019-2030**

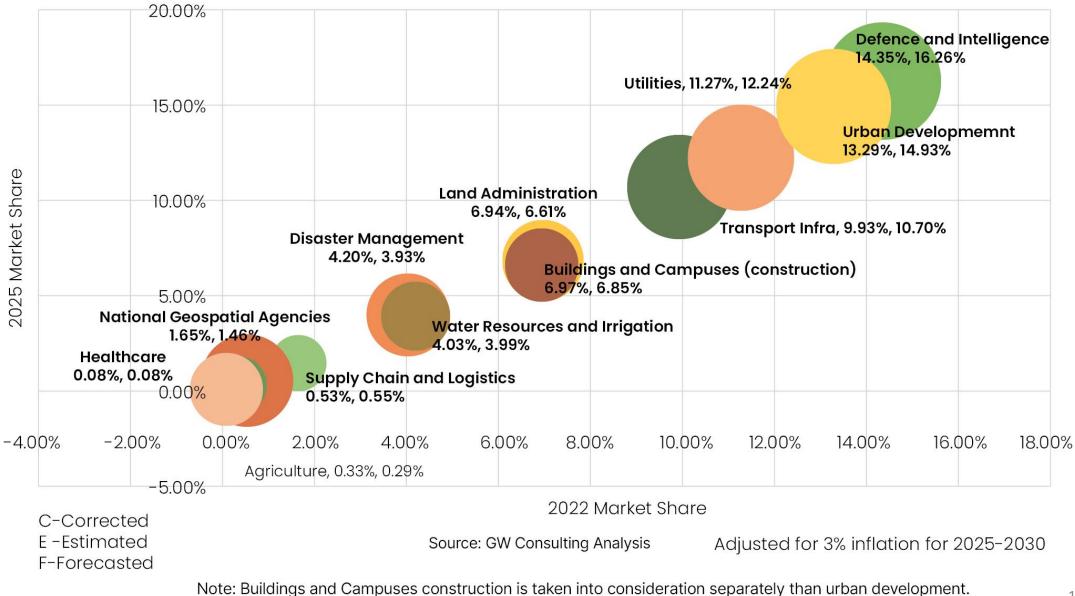


#### **INDIAN GEOSPATIAL MARKET SIZE AND FORECAST (2019-2025):** BY TECHNOLOGY SEGMENTS

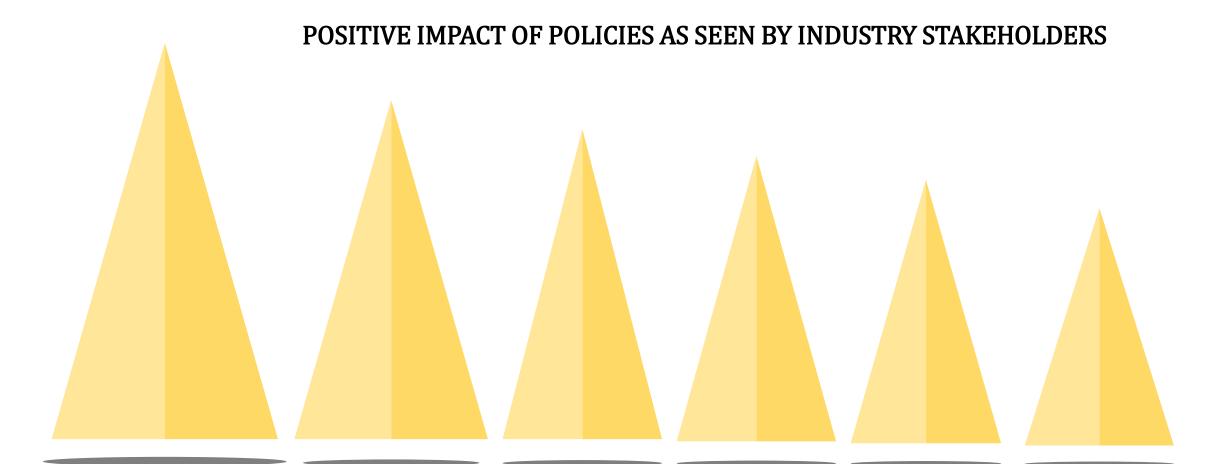


Source: Geospatial Artha 2022: Indian Geospatial Industry Outlook Report

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



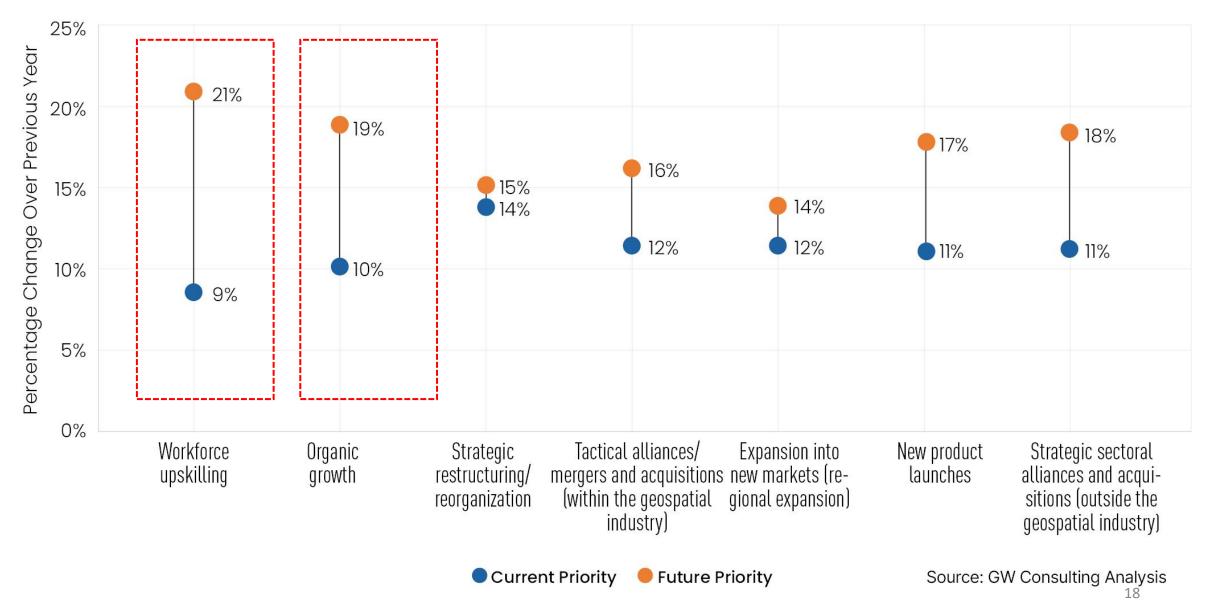
Source: Geospatial Artha 2022: Indian Geospatial Industry Outlook Report



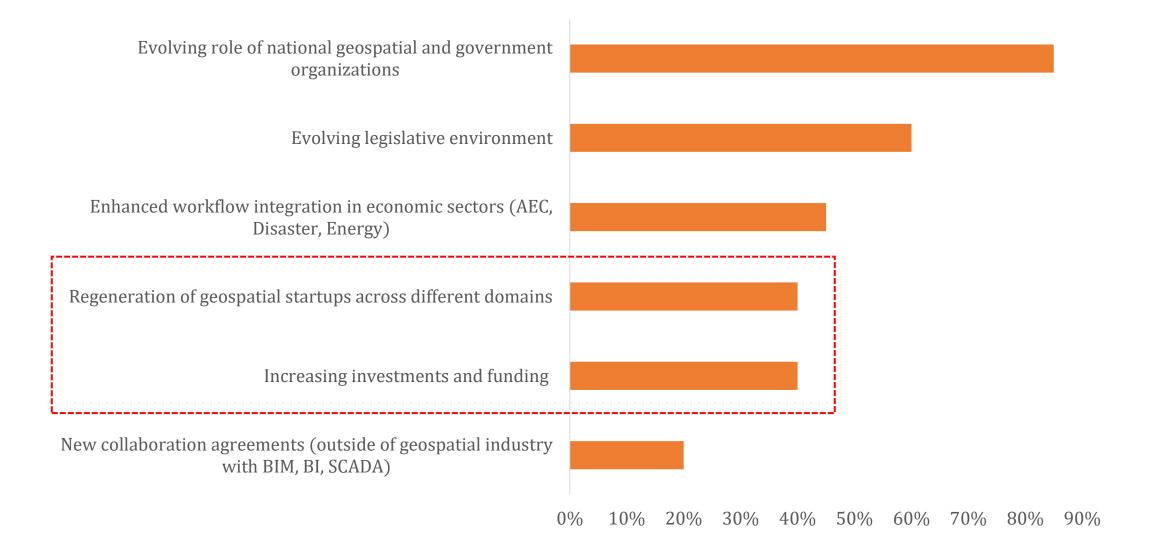
Significant improvement in the reselling of satellite images Increased efforts for realignment of organizational objectives and plans, etc. according to the NGP Smoother access to highresolution images Increased contribution to the development of the local ecosystem Growth in upstream and downstream companies in the Indian space market Notable positive interactions between the industry and the government

Key Market Drivers		Key Technology Trends
Increased geospatial technology integration in key economic sectors (AEC, Defense, Supply Chain and	1	Drones/UAVs
Increased focus on solution development (focusing on platform)	2	Artificial Intelligence (AI), Machine Learning (ML), and GeoAI
Development of new and diverse business models	3	Cloud Computing
Emerging start-ups ecosystem focusing on Earth Observation	4	Internet of Things (IoT)
Evolving partnership and collaboration	5	Digital Twin
Increasing focus on public private partnerships	6	Automation and Robotics

### **INDIAN GEOSPATIAL INDUSTRY'S BUSINESS PRIORITIES**



### MARKET DRIVERS INFLUENCING THE GEOSPATIAL INDUSTRY



#### CHALLENGES FACED BY INDUSTRY STAKEHOLDERS

Administrative challenges while working with Government (well structured RFPs, payment and approval processes)

Alignment between existing policies and guidelines

Transparency and information sharing challenges

Lack of effective interdepartmental coordination within the Government agencies/departments

Cultural/ communication barriers

1

2

3

4

5

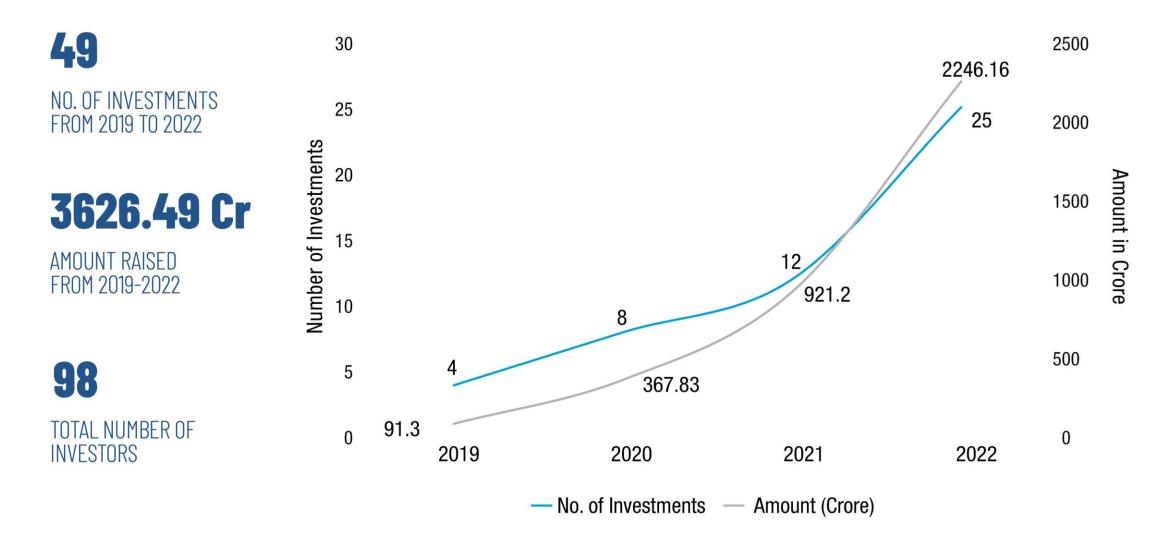
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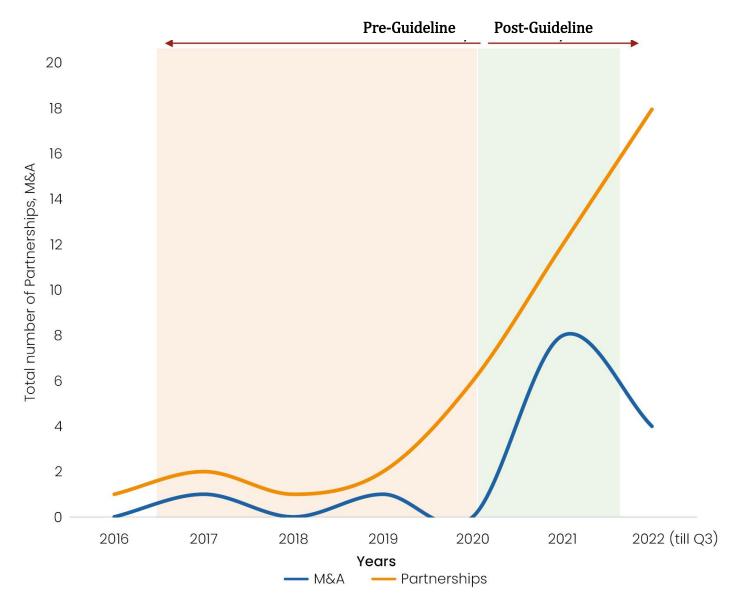
Lack of awareness amongst the users about advanced utilization of geospatial technologies apart from GIS

Fragmented communication channels within the industry

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



### 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 WØRLD

ADVANCING KNOWLEDGE FOR SUSTAINABILITY