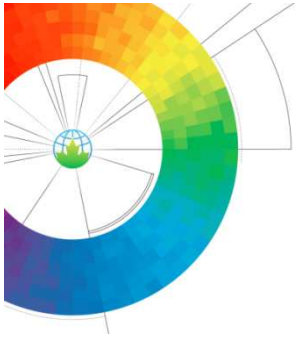


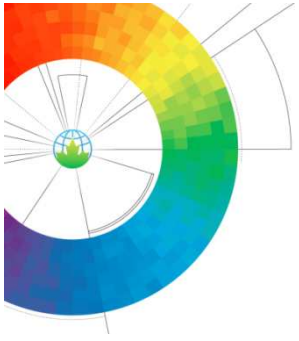
**Céline Bak**  
Analytica Advisors

**The 2014 Canadian Clean  
Technology Industry Report**



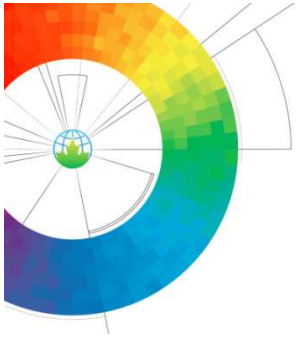
# THE CANADIAN CLEAN TECHNOLOGY INDUSTRY: A NARRATIVE OF OPPORTUNITY AND SOLUTIONS

GDP =



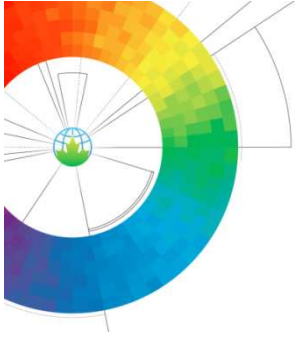
# THE CANADIAN CLEAN TECHNOLOGY INDUSTRY: A NARRATIVE OF OPPORTUNITY AND SOLUTIONS

**GDP = PUBLIC INVESTMENT +**



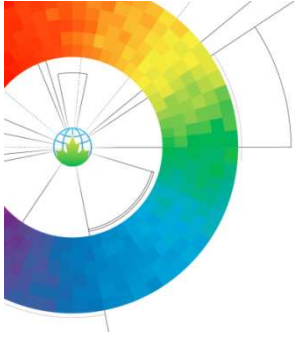
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**GDP = PUBLIC INVESTMENT +  
CONSUMER SPENDING +**



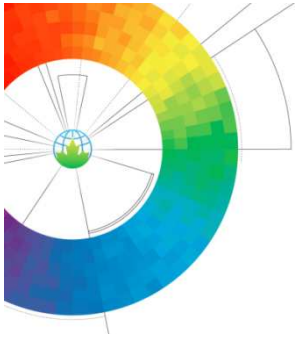
# THE CANADIAN CLEAN TECHNOLOGY INDUSTRY: A NARRATIVE OF OPPORTUNITY AND SOLUTIONS

GDP = PUBLIC INVESTMENT +  
CONSUMER SPENDING +  
INDUSTRY INVESTMENT +



## THE CANADIAN CLEAN TECHNOLOGY INDUSTRY: A NARRATIVE OF OPPORTUNITY AND SOLUTIONS

GDP = PUBLIC INVESTMENT +  
CONSUMER SPENDING +  
INDUSTRY INVESTMENT +  
**EXPORTS**



# THE CANADIAN CLEAN TECHNOLOGY INDUSTRY – ENABLING AND DELIVERING ECONOMIC OPPORTUNITY

## CANADIAN CLEAN TECHNOLOGY INDUSTRY TAXONOMY

### UPSTREAM SECTORS

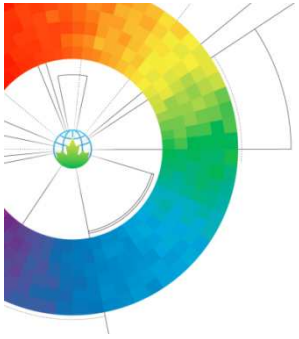
- Biorefinery Products
- Power Generation

### DOWNSTREAM SECTORS

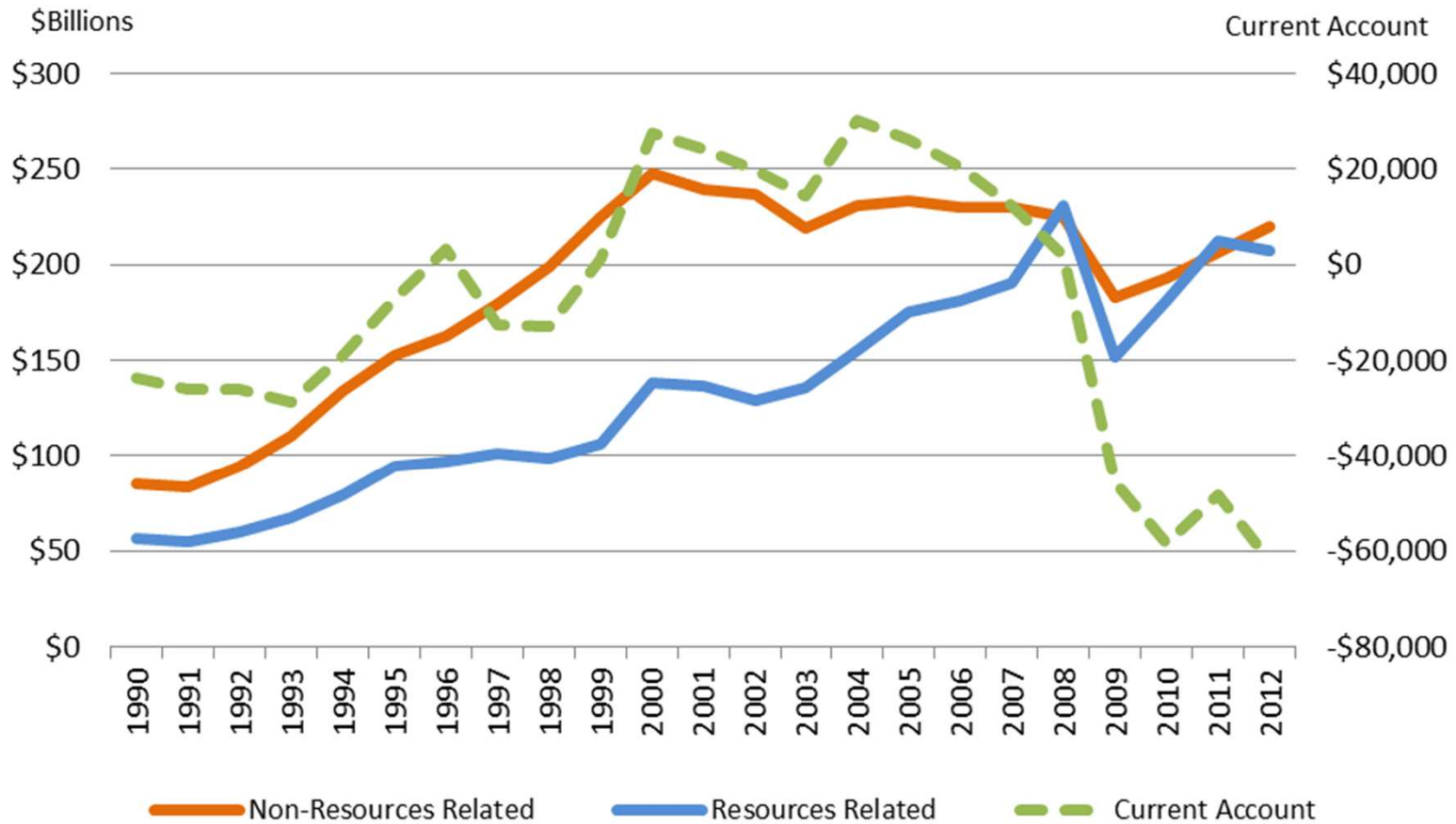
- Energy Infrastructure/Smart Grid
- Energy Efficiency/Green Buildings
- Industrial Processes & Products
- Extractive Processes & Products
- Transportation
- Recycling, Recovery & Remediation

### WATER & AGRICULTURE SECTORS

- Water & Wastewater
- Agriculture

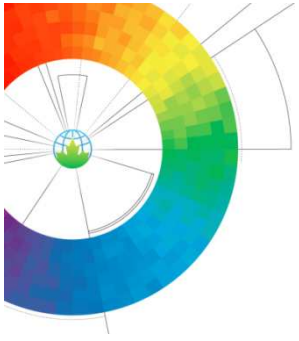


# CANADIAN EXPORTS – AN OPPORTUNITY TO COLLABORATE



Data Sources: Statistics Canada, EIA, Bank of Canada, Analytica Advisors

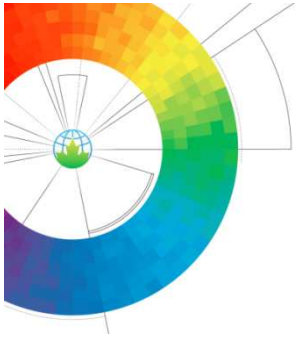




## THE SURPRISING ECONOMIC CREDENTIALS OF THE EMERGING INDUSTRY

2012 INDUSTRY  
REVENUE

**\$11.3B**



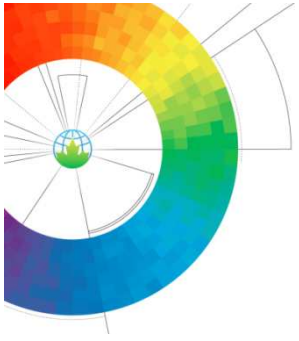
## THE SURPRISING ECONOMIC CREDENTIALS OF THE EMERGING INDUSTRY

2012 INDUSTRY  
REVENUE

**\$11.3B**

2010 TO 2012  
CANADIAN  
INDUSTRY REVENUE  
CAGR

**10%**



## THE SURPRISING ECONOMIC CREDENTIALS OF THE EMERGING INDUSTRY

2012 INDUSTRY  
REVENUE

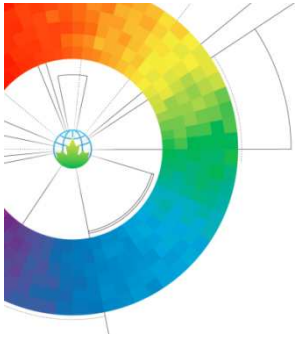
**\$11.3B**

2010 TO 2012  
CANADIAN  
INDUSTRY REVENUE  
CAGR

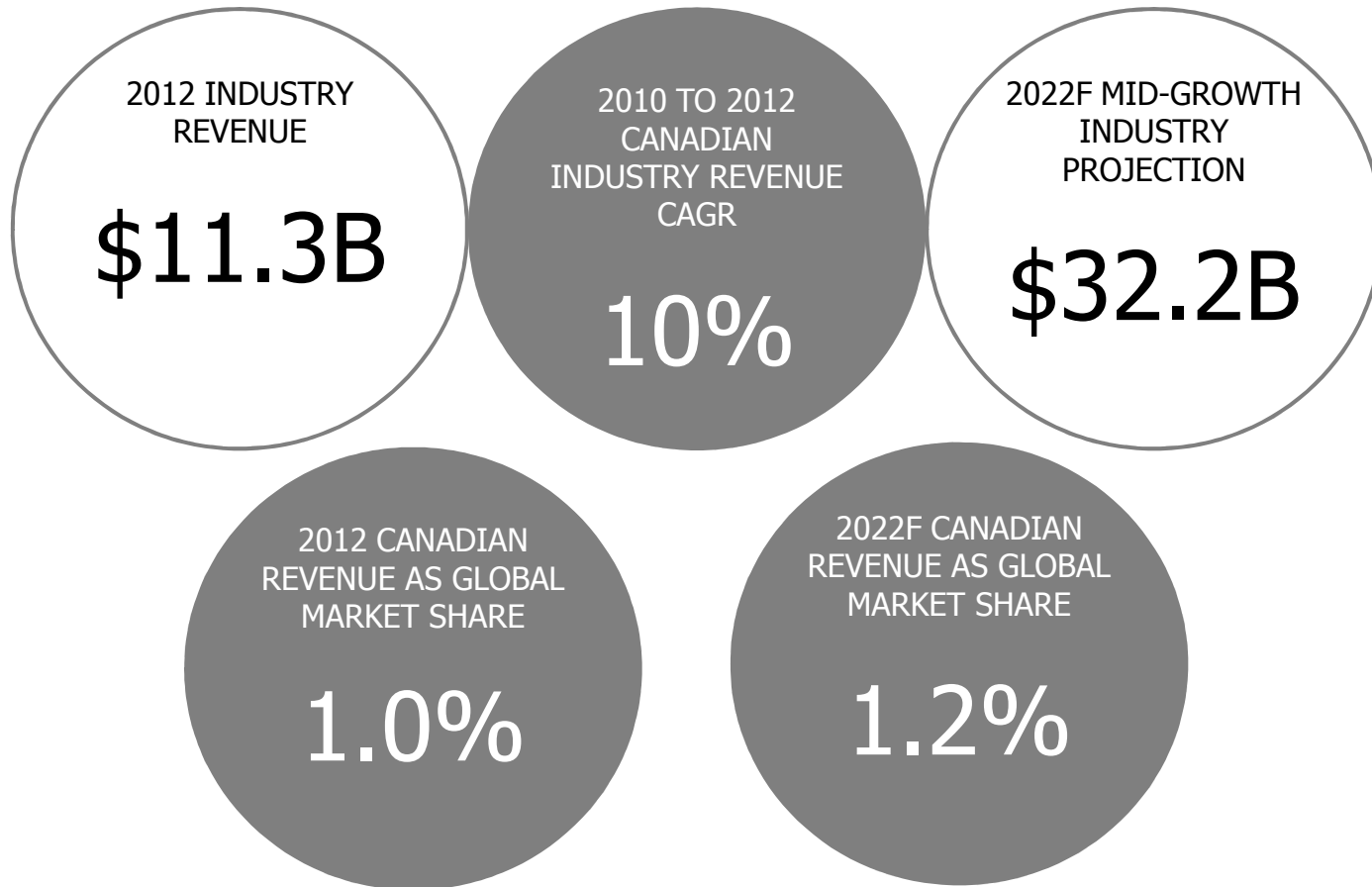
**10%**

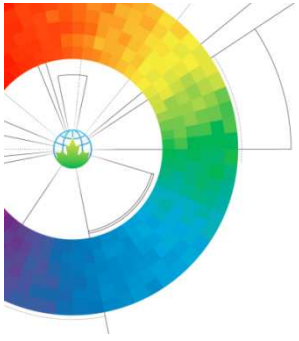
2022F MID-GROWTH  
INDUSTRY  
PROJECTION

**\$32.2B**



## THE SURPRISING ECONOMIC CREDENTIALS OF THE EMERGING INDUSTRY

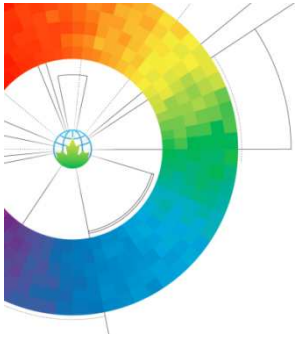




## THE SURPRISING ECONOMIC CREDENTIALS OF THE EMERGING INDUSTRY

2012 INDUSTRY  
EMPLOYMENT

**41,100**



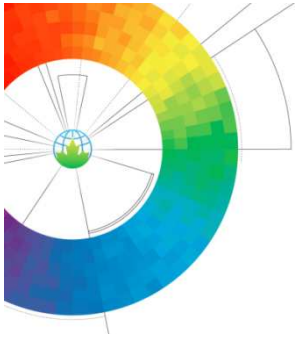
## THE SURPRISING ECONOMIC CREDENTIALS OF THE EMERGING INDUSTRY

2012 INDUSTRY  
EMPLOYMENT

**41,100**

EMPLOYMENT  
2011 TO 2012 YoY  
PERCENT GROWTH

**6%**



## THE SURPRISING ECONOMIC CREDENTIALS OF THE EMERGING INDUSTRY

2012 INDUSTRY  
EMPLOYMENT

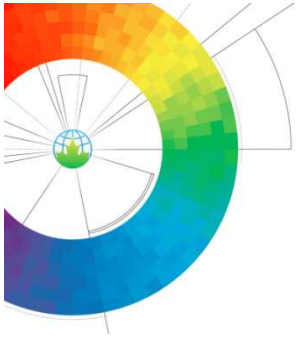
**41,100**

EMPLOYMENT  
2011 TO 2012 YoY  
PERCENT GROWTH

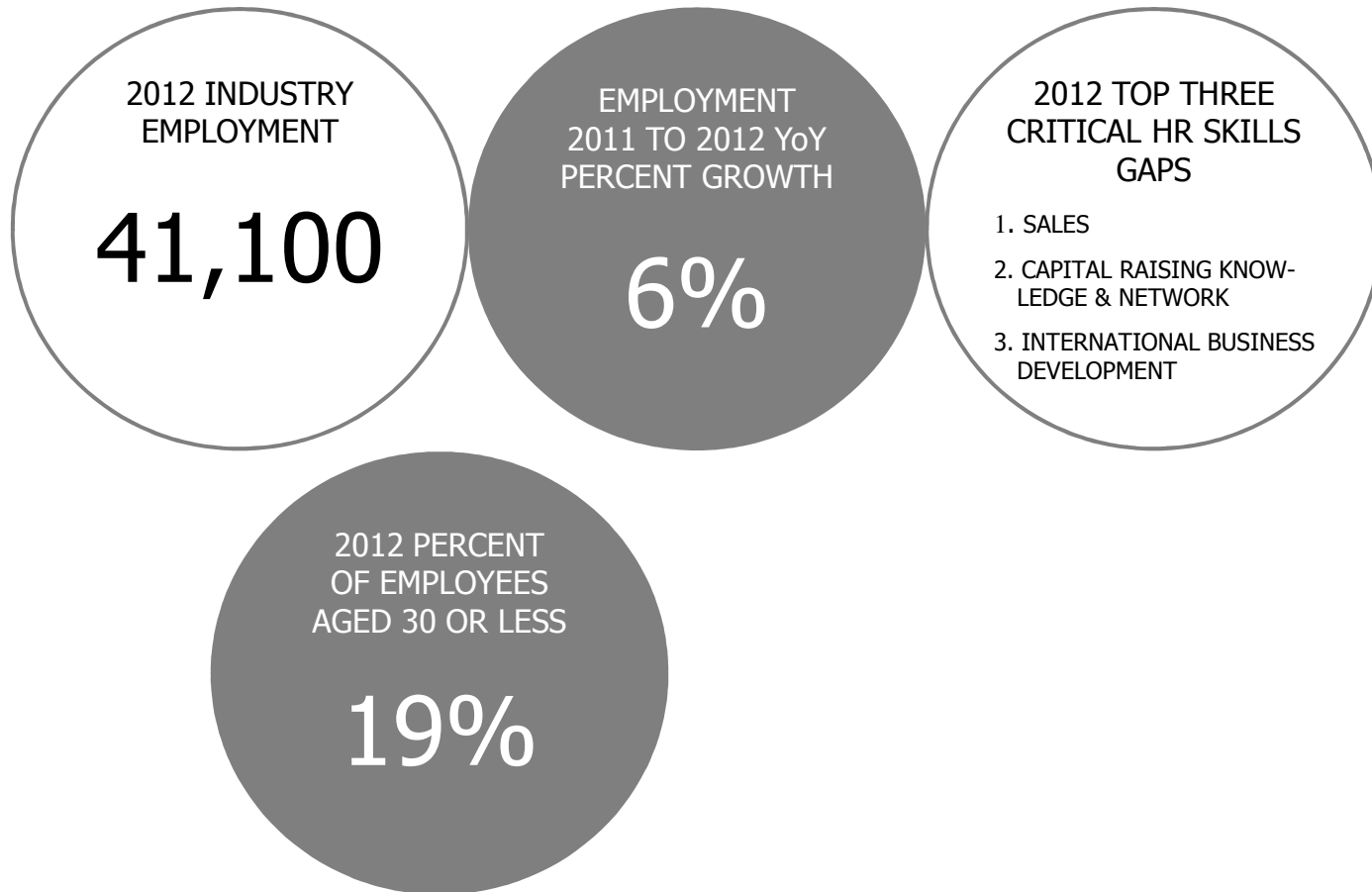
**6%**

2012 TOP THREE  
CRITICAL HR SKILLS  
GAPS

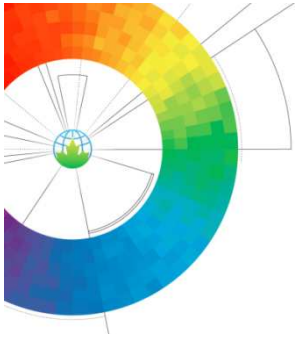
1. SALES
2. CAPITAL
3. BUSINESS DEVELOPMENT



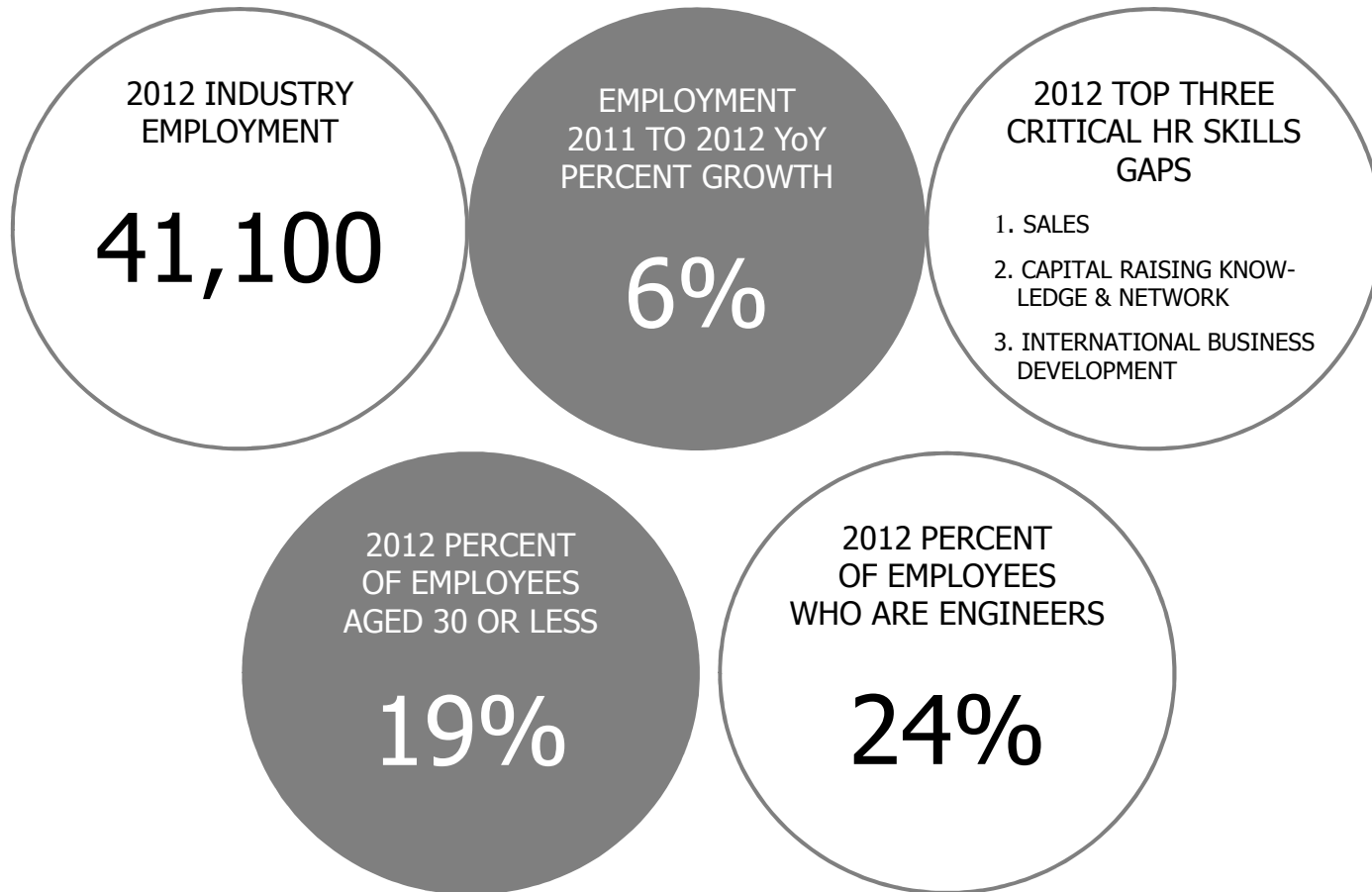
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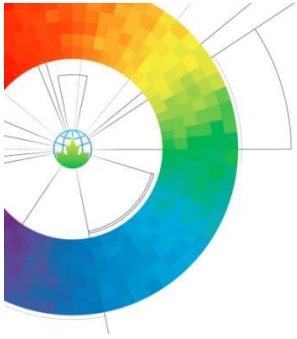




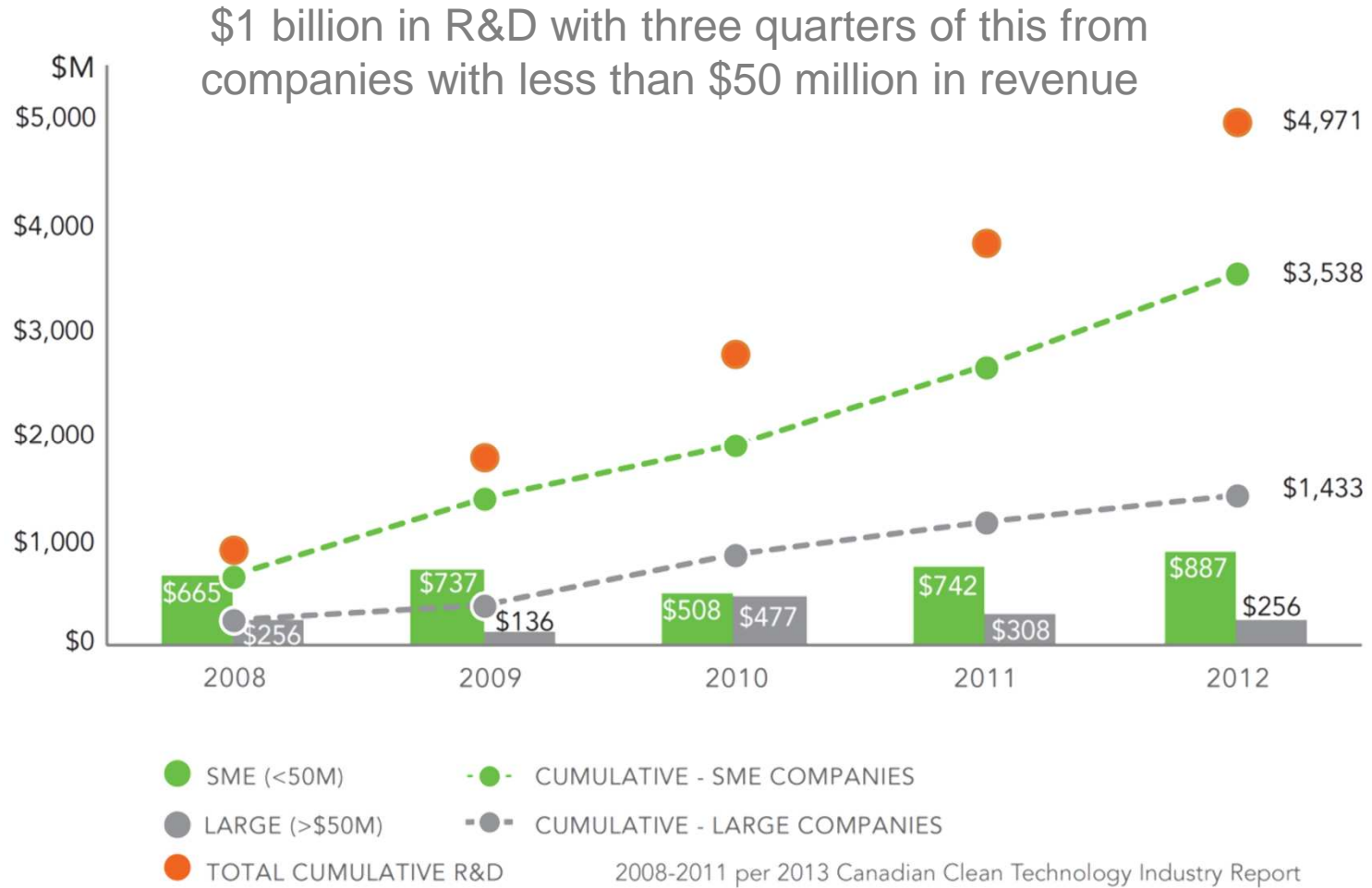


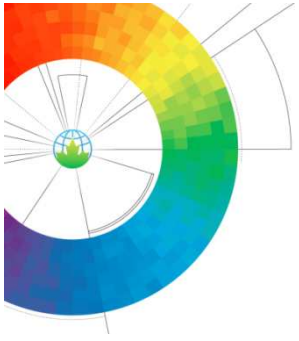
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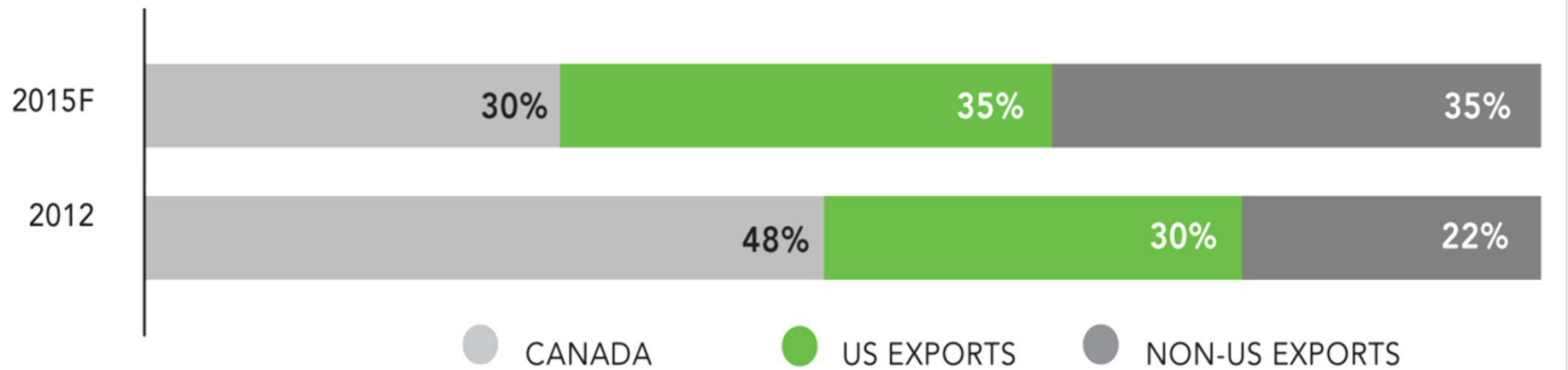
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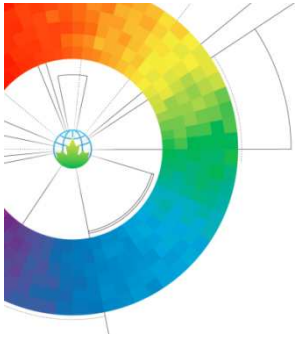




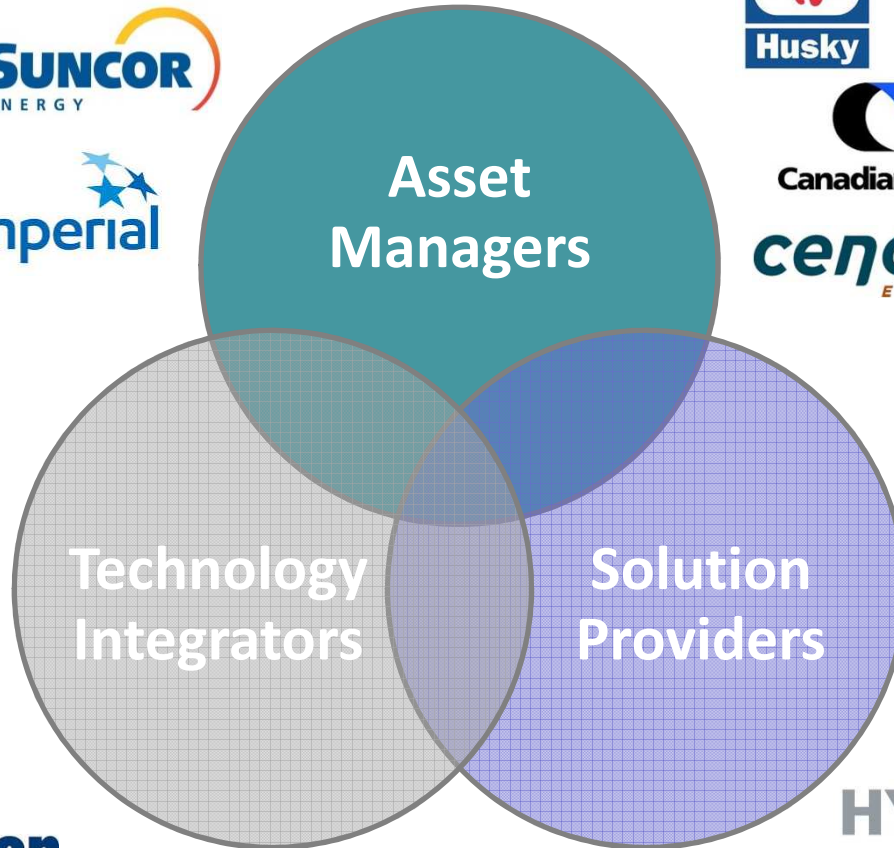
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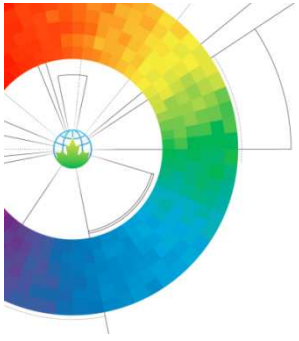
- 52 percent of revenues from exports
- 22 percent of industry revenues coming from non-US markets





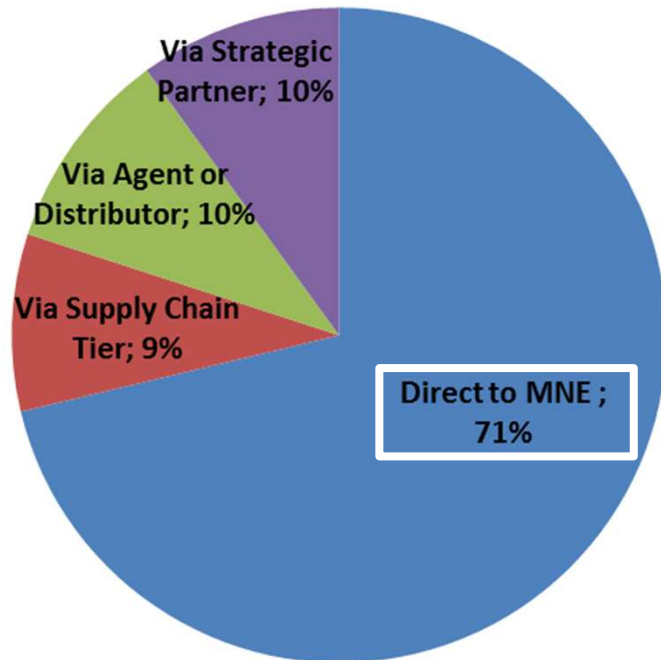
# COLLABORATION IS AT THE CORE



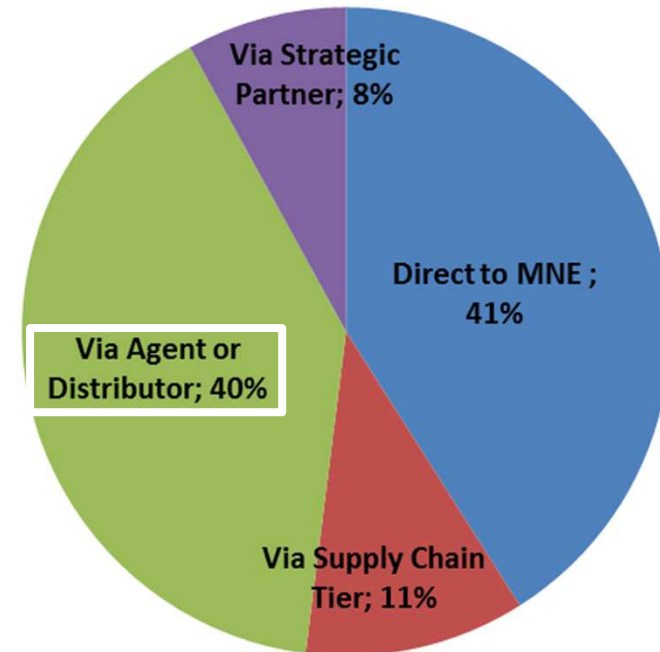


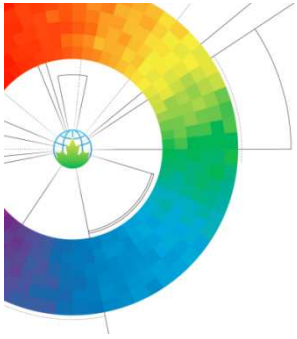
IN ORDER TO HAVE THE FULL BENEFIT FROM THE INDUSTRY, WE NEED TO RECOGNIZE WHAT INVESTORS ARE LOOKING FOR:

Companies with \$10 to \$25 Million in Annual Revenue



Companies with \$25 to \$100 Million in Annual Revenue





# THERE IS STILL MUCH WORK TO DO ON FINANCE

