

Market opportunities ACES, 2014



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Technical team



Market team



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Agenda

- Intro to Earth observation market demand
- Market pull-push factors
- Market segments
- Roadmaps for market growth



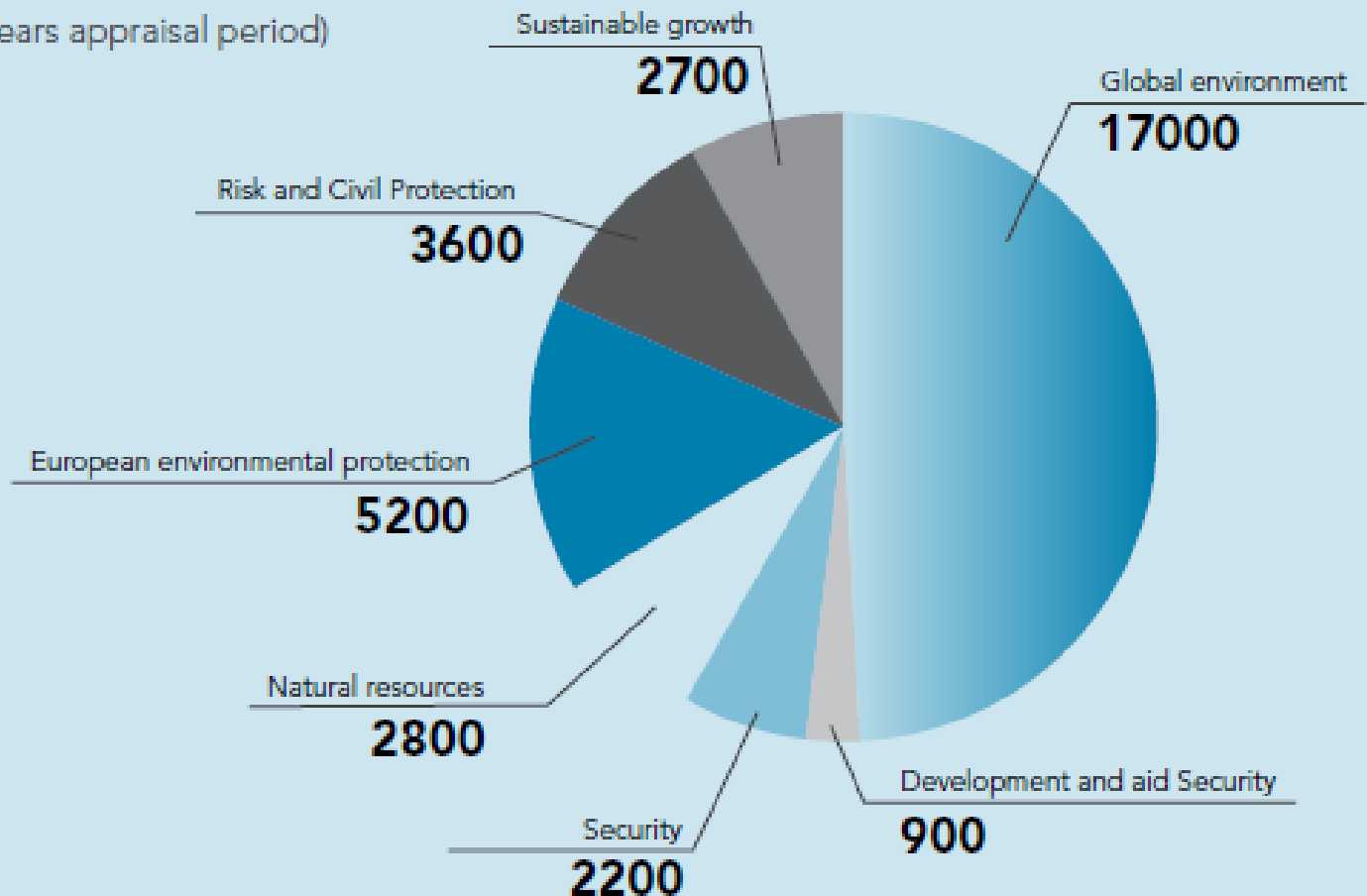


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Earth observation is delivering value

Gmes Benefits by Public Policy Domain.

Total 35 Billion Euros
(25 years appraisal period)



Source: 2006 PwC analysis reported in eoVOX "Business in Earth observation." www.eovox.org.

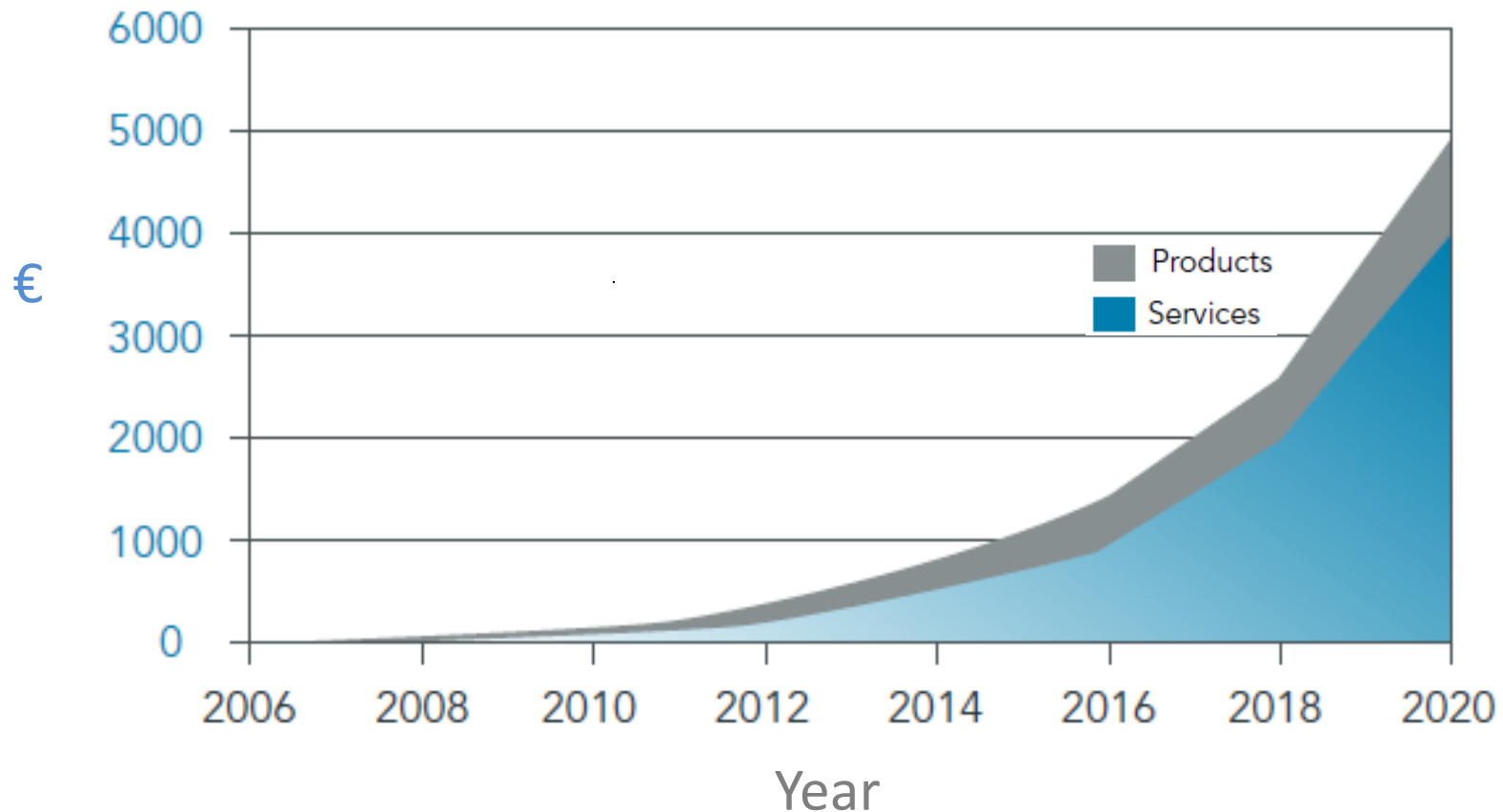


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Demand for Earth observation products and services is growing



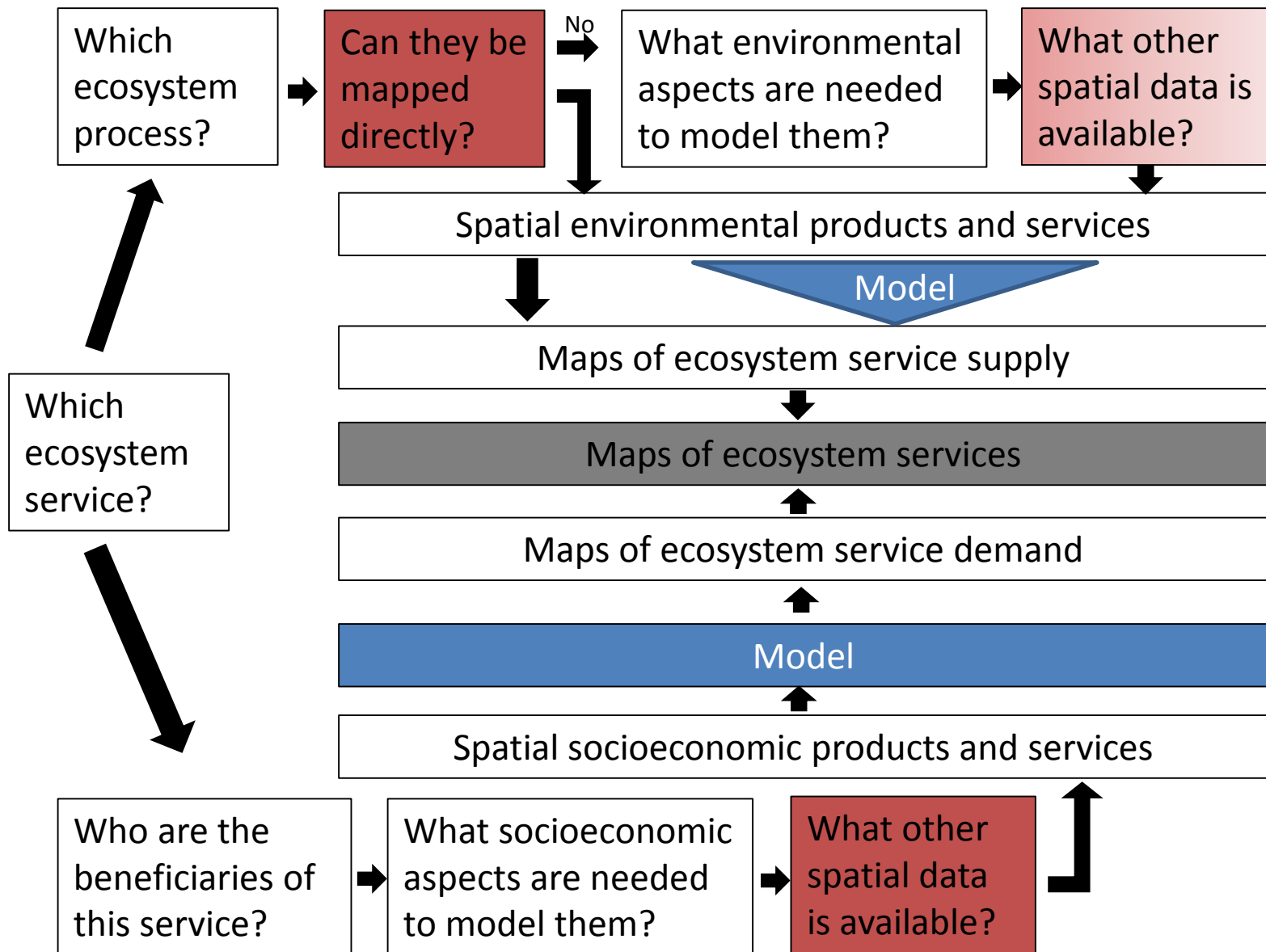
Global European Earth observation turnover (€ millions)



Source: ISU- MSS reported in eoVOX 2008 "Business in Earth observation." www.eovox.org.



Marginal value of products and services vs. alternatives





Data opportunities (push-pull factors)



Opportunities to expand the use of Earth observation products and services

Affordable

- Sentinels have been coming online
- Base maps (e.g. classes, use)
- GIS based tools (e.g. InVEST, bespoke)
- Earth observation awareness and capacity building

Reliable

- Established validation procedures
- Benefits of SAR and Optical

Available

- Product and services portals
- Redundancy in sensors
- Awareness of cost competitive products



Market segments (pull/useable)



- **Ecosystem management & public policy**
 - Disaster management
 - Conservation
 - Natural capital accounts
- **Impact assessments**
 - Mitigation hierarchy
- **Product & production management**
 - Food, fuel, fiber & feed
- **Payments for Ecosystem Services**
 - Carbon, biodiversity, etc.
 - Water



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Ecosystem management & public policy roadmap



Trials		
UNEP	Afghanistan	Ecosystem based disaster risk reduction
WAVES	Philippines	Natural capital accounting
Quebec Center for Biodiversity	Canada	Natural capital accounting
Conservation International	Peru	Natural Capital accounting
WWF	Mozambique	Coral reef and fisheries management

Opportunities for expansion

- Natural capital accounting (national, corporate*)
- Landscape scale management
- Decision support tools and approaches
- Protected area management



Impact assessments roadmap



Trials

BP

UK

Oil and liquefied gas terminal

Opportunities for expansion

- Long term monitoring and evaluation
- Mitigation/offset regulations
- Insurance premiums
- Baseline assessments for strategic impact assessments



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Product & production management roadmap



Trials

IUCN	Georgia	Forest management
Winrock International	Liberia	Biomass management
EcoAgriculture Partners	Tanzania	Landscape scale management

Opportunities for expansion

- Certification (FSC, RA, biomass certification)
- Landscape management (EcoAgriculture, Alliance for Watershed Stewardship)
- Corporate natural capital accounting*



Payments for Ecosystem Services



Trials		
ZSL	Indonesia	REDD+
WWF Brazil/ Sky Rainforest Rescue	Brazil	Deforestation rates and carbon, water and biodiversity PES

Opportunities for expansion

- REDD+, water, biodiversity, wetlands
- Corporate natural capital accounting*



Candidate roadmap efforts

1. Products and tools for implementing the mitigation hierarchy
2. Disaster management (coastal, snow melt, etc.)
3. Products and tools for landscape assessment and management
4. Products and tools for natural capital accounting



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