Canadian Clean Technology Industry

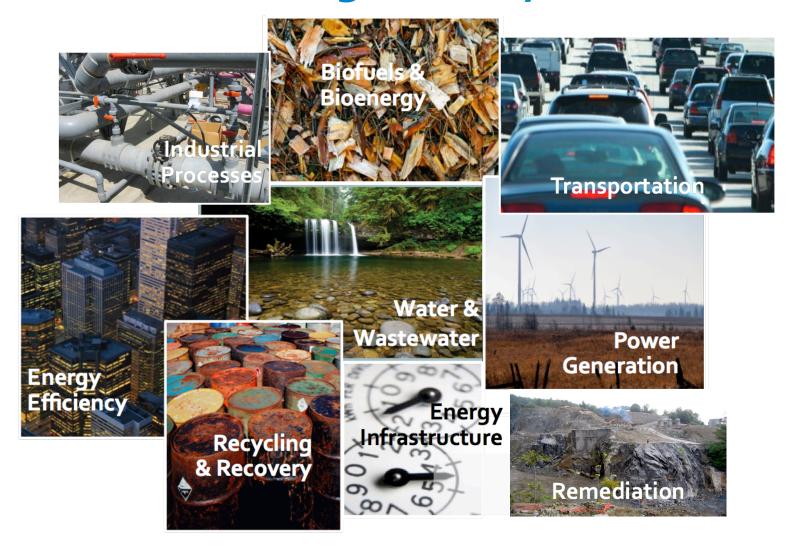
Research Money Conference

May 16, 2012

Céline Bak

Analytica Advisors
Canadian Clean Technology Coalition

Diverse and Growing Industry



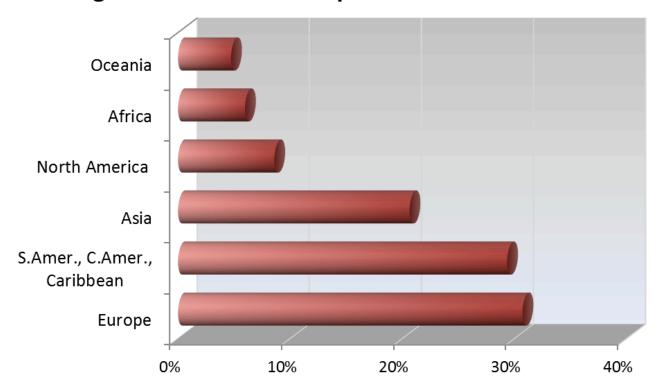
2008 to 2010 19% CAGR

Clean Technology Opportunity: Globally Competitive

UPSTREAM SEGMENT DOWNSTREAM SEGMENT **WATER SEGMENT** Water & Wastewater Biofuels & Bioeneray Energy Infrastructure / **Smart Grid** Power Generation Remediation & Soil Treatment Transportation Recycling & Recovery Energy Efficiency Industrial Processes Greater than 50 percent of revenues from exports Greater than 60 percent of revenues from exports Even domestically focused sectors are now growing exports

Export Focused

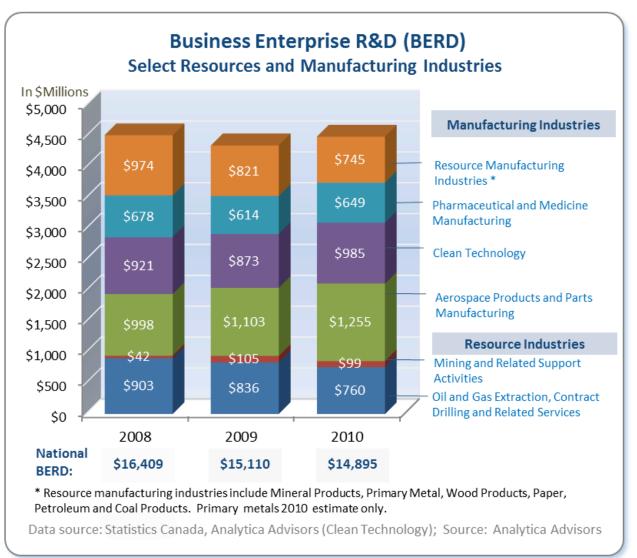
Regions of Interest for Exports and Demonstration



All countries with interest in exports and demonstration



Clean Technology Opportunity: R&D comparable to Aerospace & Defence



Canadian clean technology opportunity based on 2 percent global market share

Economic Opportunity for a \$1.6 trillion Economy with \$400 billion in Exports

	2010	2020
Industry Revenues	\$9 billion	\$60 billion
Jobs	44 000	125 000
Multipliers	4.97/3.85	
Exports	\$4.7 billion	\$35 to \$45 billion
R&D Investment	\$985 million	