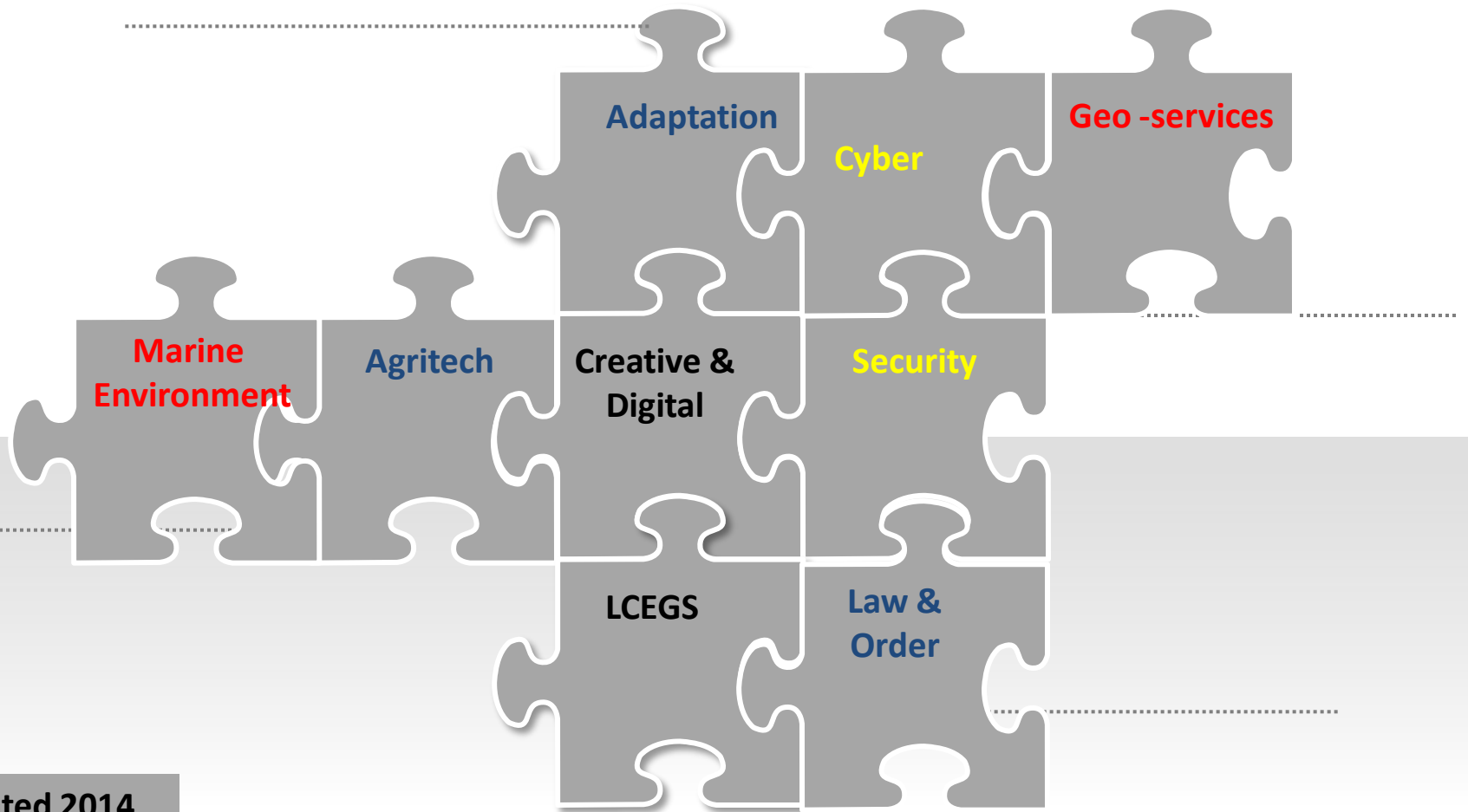


kMatrix Sector Research Update 2015



Updated 2014

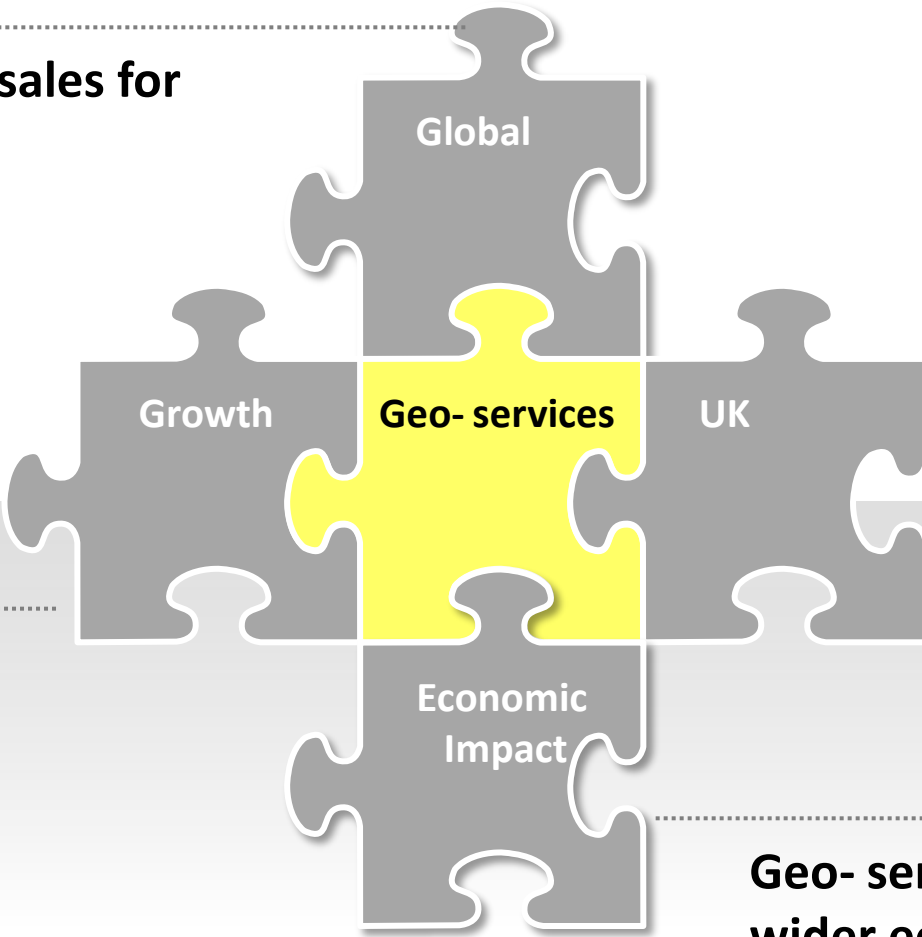
New 2014

New 2015

Updated 2015

New Research- Geo- services 2013/ 14

£99bn global sales for Geo- services



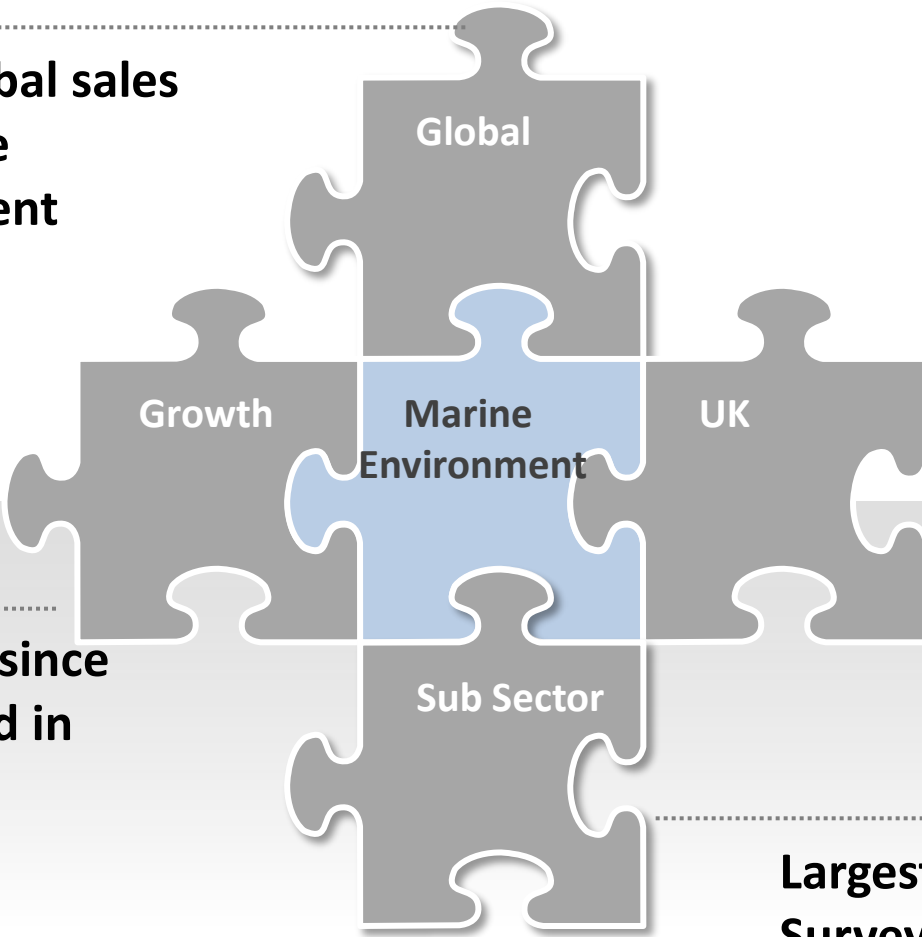
UK= £2.2bn in 2013/ 14 (2% of total)

Sector value = £170bn by 2020

Geo- services delivered a wider economic impact of £1.2trn in 2013/ 14

New Research- Marine Environment 2013/ 14

£20bn global sales for Marine Environment



UK= £724m (4% of total and ranked third by sales value)

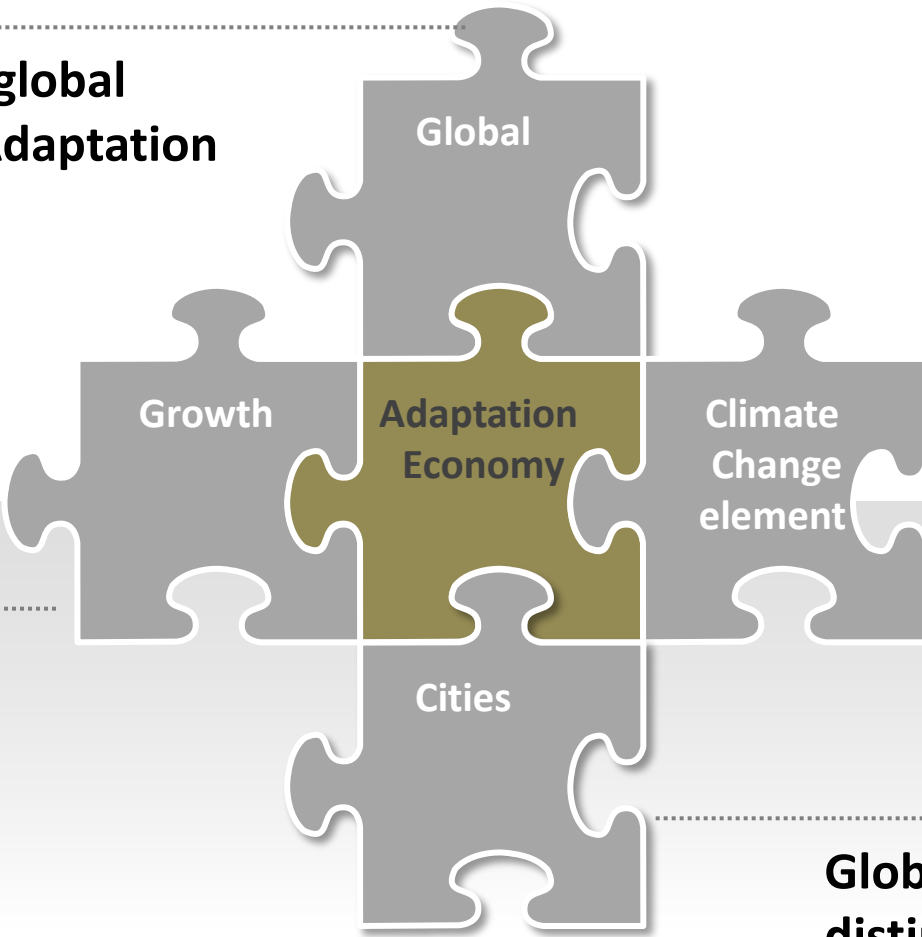
4% annual growth since 2011/ 12, sustained in future years

Largest sub sectors are Surveying & Monitoring and Environmental Testing

Note: Sector definition was client-related and, therefore, understates the size of the full marine environment sector

New Research- Adaptation Economy 2012/ 13

£1,417bn global sales for Adaptation Economy



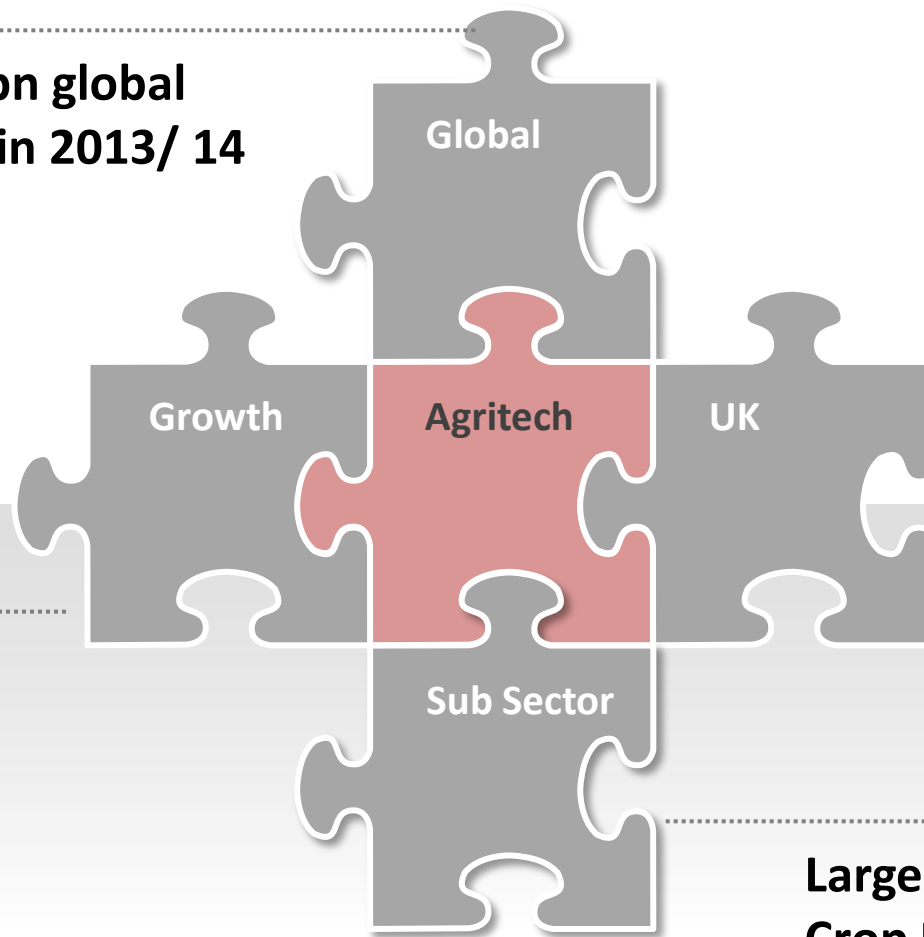
Adaptation due to Climate Change = £206bn (14.5% of total)

4.7% since 2011/12, sustained in future years

Global Cities have distinctive Adaptation Economies

New Research- Agri-technology 2013/ 14

£251bn global sales in 2013/ 14



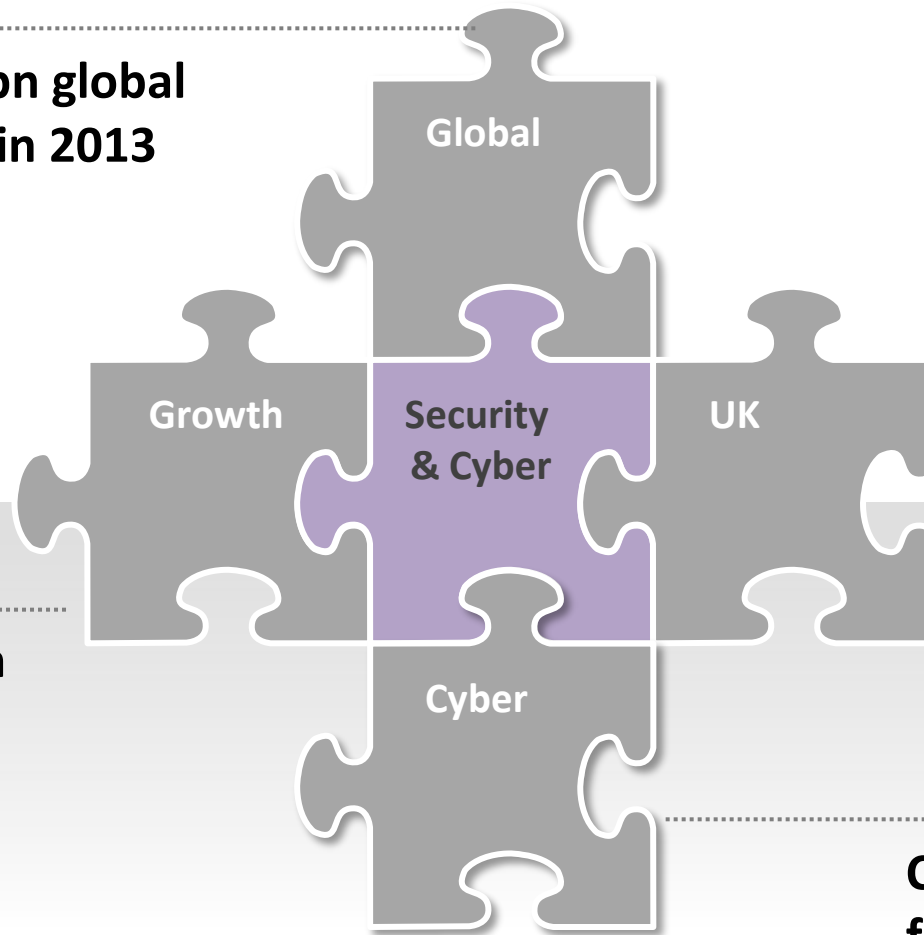
UK sales of £7.2bn, 3% of the global total

Forecast global growth of 2.4% in 2014/ 15

Largest sub sectors are Crop Machinery and Livestock Management

Updated Research- Security & Cyber 2013

£466bn global sales in 2013



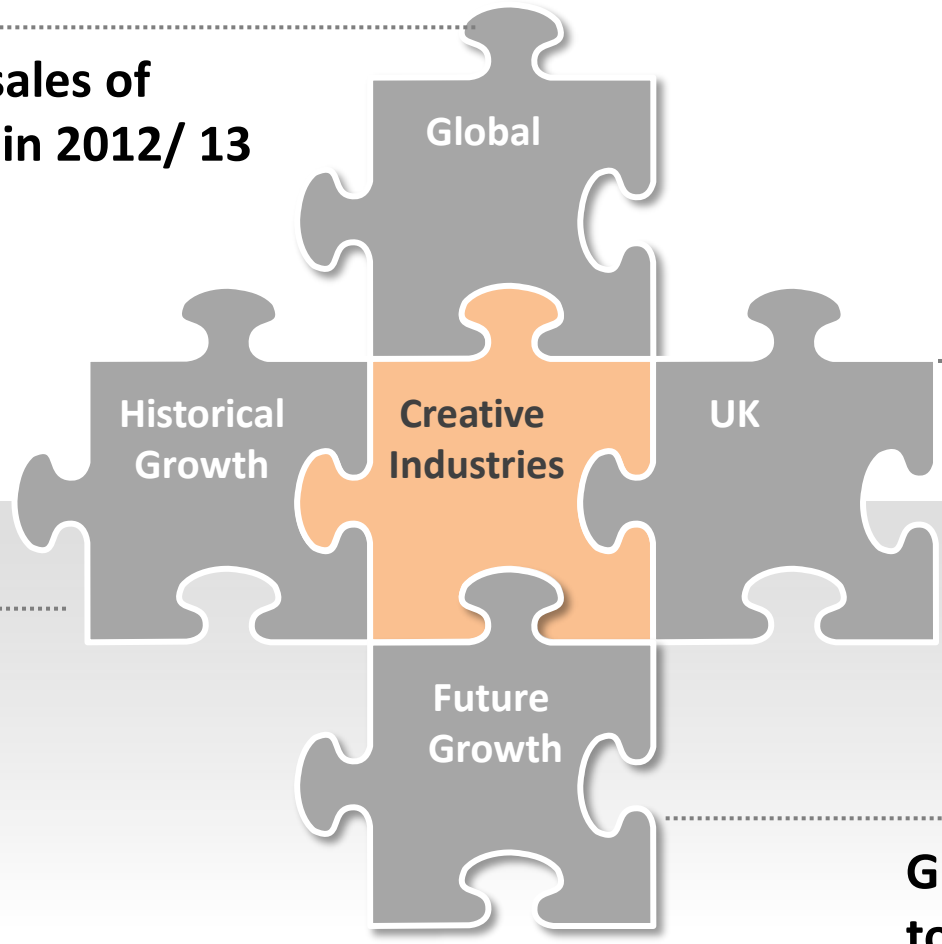
UK sales of £15.3bn, with an increase of 21% since 2012

14% global growth since 2012

Cyber to grow from 40% to 50% of sector by 2016

Updated Research-Creative Industries 2012/ 13

Global sales of
£5.3trn in 2012/ 13



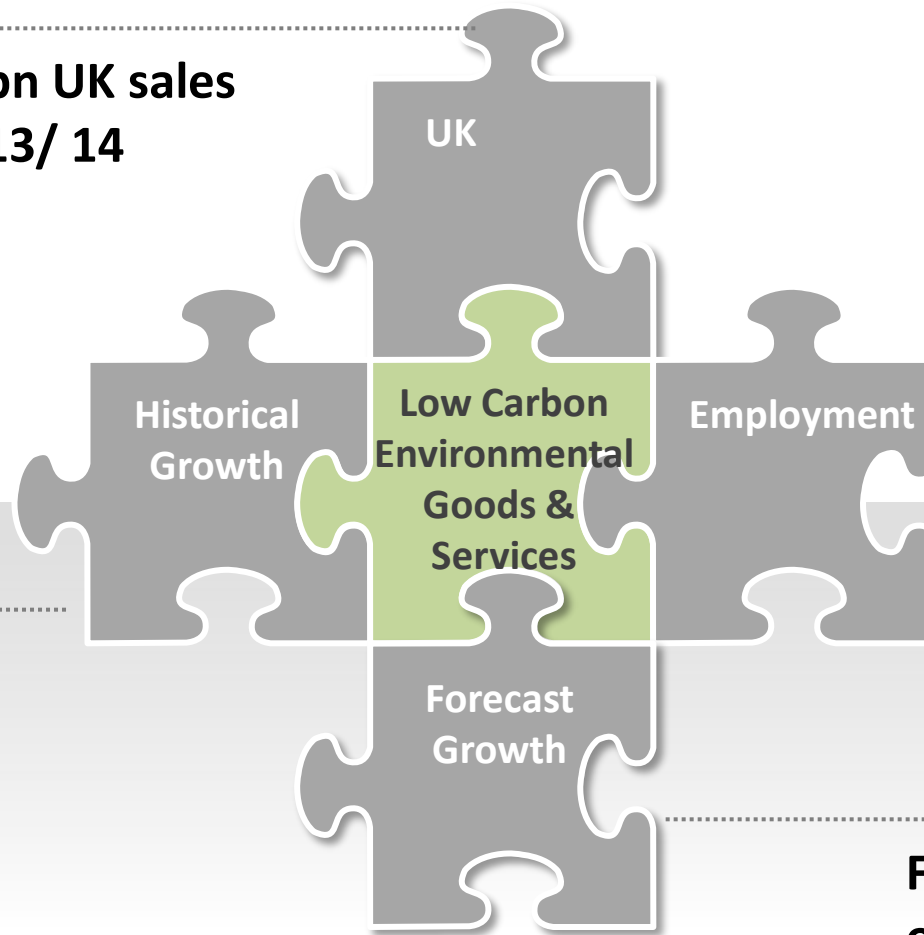
UK sales of
£146bn, ranked
6th globally

Global growth of
6% since 2011/ 12

Global sales to
top £7trn by 2016

Updated Research- LCEGS 2013/ 14

**£141bn UK sales
in 2013/ 14**



**LCEGS
employment tops
1m in 2013/ 14**

**Growth of 5%
since 2012/ 13**

**Forecast growth
of 5% in 2014/ 15**