3D SYSTEMS

Launch Event

November 7, 2017

Forward-Looking Statements

Certain statements made in this release that are not statements of historical or current facts are forward-looking statements within the meaning of the Private Securities Litigation Reform Act of 1995. Forward-looking statements involve known and unknown risks, uncertainties and other factors that may cause the actual results, performance or achievements of the company to be materially different from historical results or from any future results or projections expressed or implied by such forward-looking statements. In many cases, forward looking statements can be identified by terms such as "believes," "belief," "expects," "may," "will," "estimates," "intends," "anticipates" or "plans" or the negative of these terms or other comparable terminology. Forward-looking statements are based upon management's beliefs, assumptions and current expectations and may include comments as to the company's beliefs and expectations as to future events and trends affecting its business and are necessarily subject to uncertainties, many of which are outside the control of the company. The factors described under the headings "Forward-Looking Statements" and "Risk Factors" in the company's periodic filings with the Securities and Exchange Commission, as well as other factors, could cause actual results to differ materially from those reflected or predicted in forward-looking statements. Although management believes that the expectations reflected in the forward-looking statements are reasonable, forward-looking statements are not, and should not be relied upon as a guarantee of future performance or results, nor will they necessarily prove to be accurate indications of the times at which such performance or results will be achieved. The forward-looking statements included are made only as the date of the statement. 3D Systems undertakes no obligation to update or review any forward-looking statements made by management or on its behalf, whether as a result of future developments, subsequent events or circumstances or otherwise.

Vyomesh Joshi (VJ)
President and Chief Executive Officer

Our Commitment

ECOSYSTEM ENABLES WORKFLOW

- PARTNERSHIPS
- APPLICATION ENGINEERS
- ON DEMAND SOLUTIONS
- SOFTWARE
- SERVICES
- CUSTOMER
- MATERIALS
- HARDWARE
- CUSTOMER INNOVATION CENTERS

DIGITIZE · DESIGN & SIMULATE · MANUFACTURE · INSPECT · MANAGE

MAKING 3D PRODUCTION REAL

PRODUCTIVITY → DURABILITY → REPEATABILITY → TCO

Total Market Opportunity

- CEOs are under increased pressure to drive growth
- Accelerated product development cycles
- Keep costs down
- Reduce turnaround times
- Re-think how they manufacture goods
- Manufacturing footprint

Opportunity

Estimated to grow to
$20B by 2020*

| HEALTHCARE | DENTAL | AUTOMOTIVE | CONSUMER GOODS | AEROSPACE | JEWELRY |

The Market
TARGET VERTICALS 2017

Prototyping Workflows		Production Workflows	
Rapid Prototyping Design Verification	**Functional Prototyping** (10s to 1000s parts)	**Low Volume Production** (10K to 25K parts)	**Med Vol Production** (100K – Million+ parts)

Healthcare 2.9B TAM

Dental 0.5B TAM

Automotive 3.9B TAM

Durable Goods 3.5B TAM

Aerospace 1.5B TAM

Service Bureau 3.6B TAM
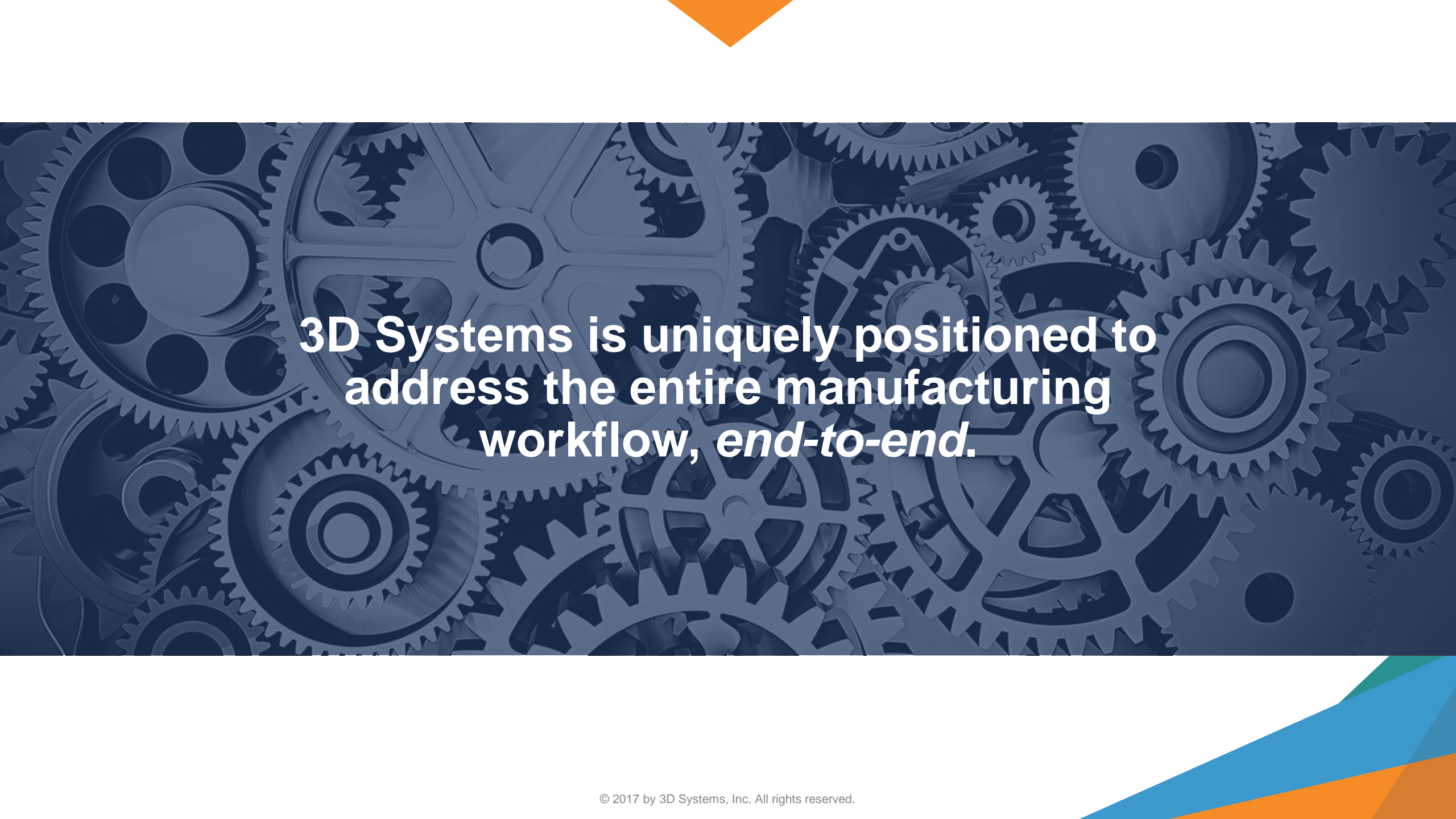
Customer Journey

		STRATEGIC DIRECTION	ORGANIZATION & PROCESSES	TECHNOLOGY ENABLEMENT
4	Strategic applications across company	Embedded in company strategy C-level sponsorship	Embedded in relevant operational areas	Production locations Research centers
3	Application in "champion" departments	Clear direction of application	"Champion" departments First cross-functional teams	Own systems Established collaborations
2	Experimenting & testing	Invest, test and understand the technology	Test 3DP technology No structured process	Testing different technologies
1	No experience	Leadership has no or low awareness	Evaluation and consideration	First considerations of form of application

Ernst & Young's Global 3D Printing Report 2016, 3DP Maturity Model

3D Systems is uniquely positioned to address the entire manufacturing workflow, *end-to-end*.
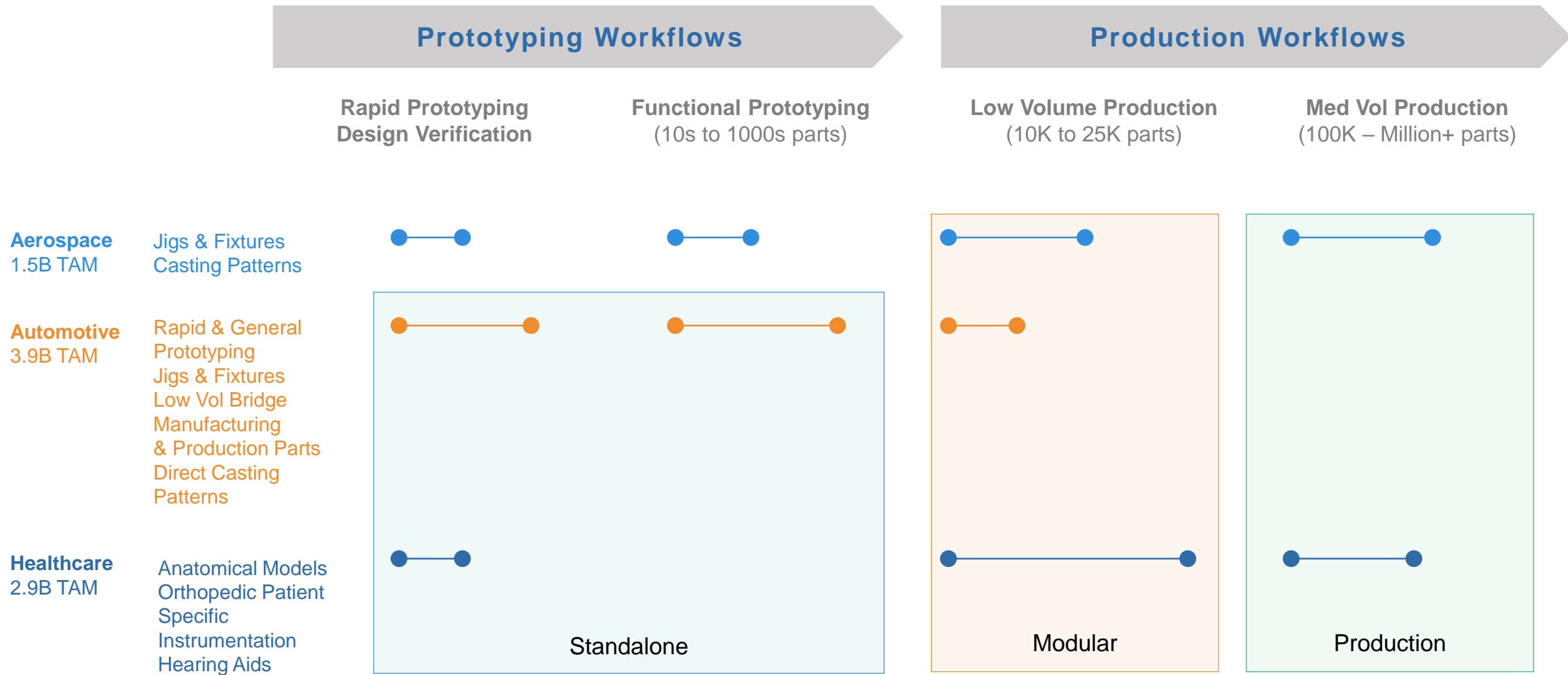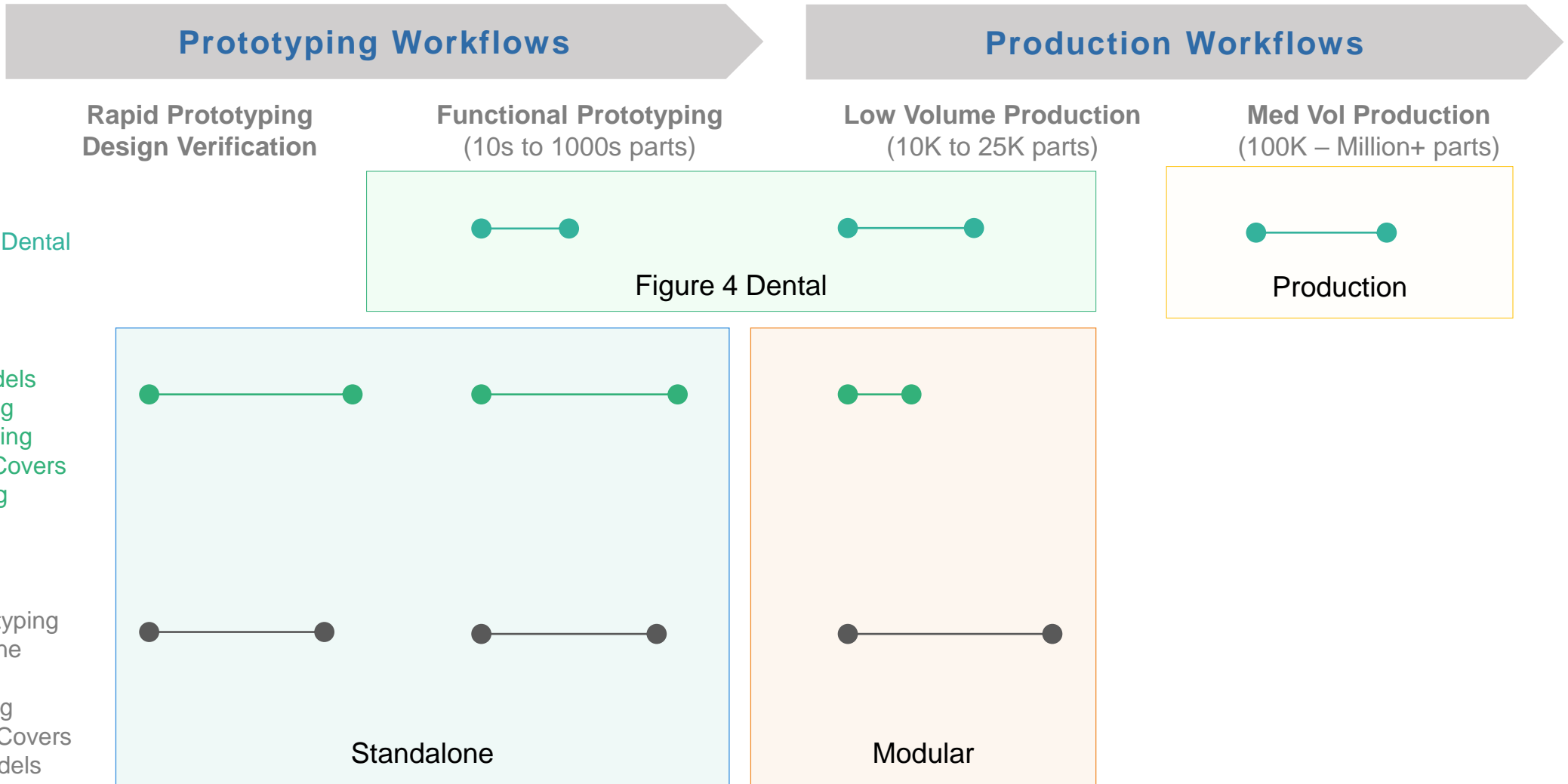
Introducing Figure 4

Next generation, modular, customizable, allowing scale from prototype to production with one material set

Figure 4
TARGET VERTICALS

Figure 4
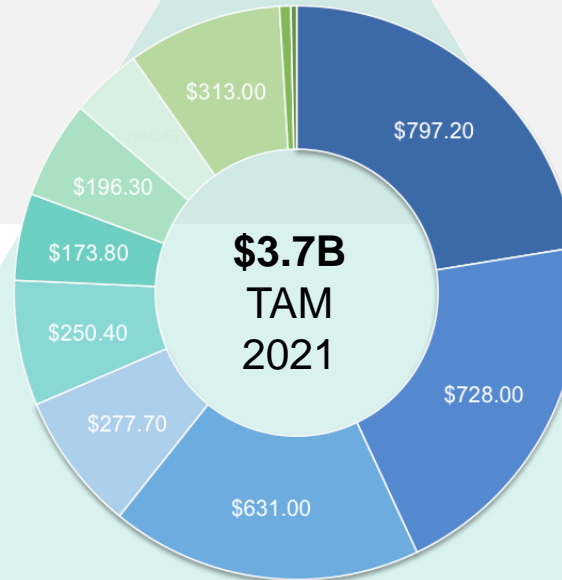## TARGET VERTICALS

Figure 4
Dental Market

Materials
NextDent

Revolutionizes traditional dental processes through high levels of productivity, durability, repeatability, and TCO.

Dental Labs | 100,000 Worldwide | 8,000 US

$313.00
$797.20
$196.30
$173.80
$250.40
$728.00
$277.70
$631.00

$3.7B
TAM
2021

Workflow
3Shape
3D Scanners
3D Connect

Hardware
Figure 4 Dental

Figure 4 Materials

Innovation to create functional production parts at breakthrough total cost of operation

- Functional production parts
- Launching 15 industrial and dental materials
- Use-case based custom materials
- 30-years experience in developing materials

1 Liter

5 gallon   55 gallon

Hand Pour   Small Pump

Industrial Pump

Materials   Cartridges   Material Delivery

Same materials work across all models

Figure 4

Modular Scalable Production Platform

1st Modular, scalable, production platform	**1st** Up to 20% lower part cost and TCO
1st Functional, production parts, ~25K price point	• Up to 15X faster throughput
1st Post processing – inline, integrated and fully automated	• Connected platform powered by 3D Sprint and 3D Connect

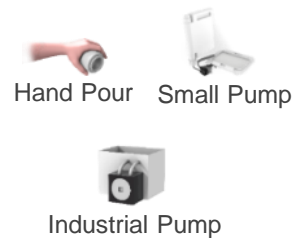**Design Verification** → **Functional Prototyping** → **Bridge Manufacturing** → **1MM+ Production Runs**

Materials	Cartridges	Material Delivery	Print Engines	Imaging	Print Trays	Print Plates	Automation
	1 Liter, 5 gallon, 55 gallon	Hand Pour, Small Pump, Industrial Pump			Standard Tray, Large Format	Standard Plate, Non-perforated	Linear Robot, 6-Axis Robot
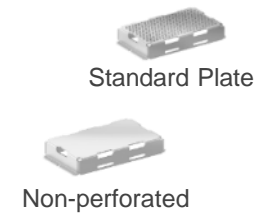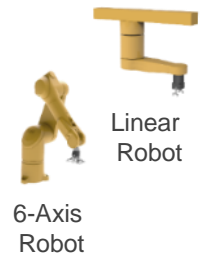
Figure 4
Products

STANDALONE SOLUTIONS

Independent Printers | Affordable | Ease of Use | Adaptable

FACTORY SOLUTIONS

Integrated Modules | Connected | Full Automation | Process Control

Figure 4 Dental

Dental Labs

Small & Large

10+ Dental use cases

Up to 10X lower part cost

Up to 5X faster

Figure 4 Standalone

Small Design Shops | OEMs

Smaller Service Providers

Affordable

Functional prototypes

Ideal in emerging geographies

Figure 4 Modular

Service Providers

Medium OEMs

Flexible configuration

Low volume production

Scales with demand

Figure 4 Production

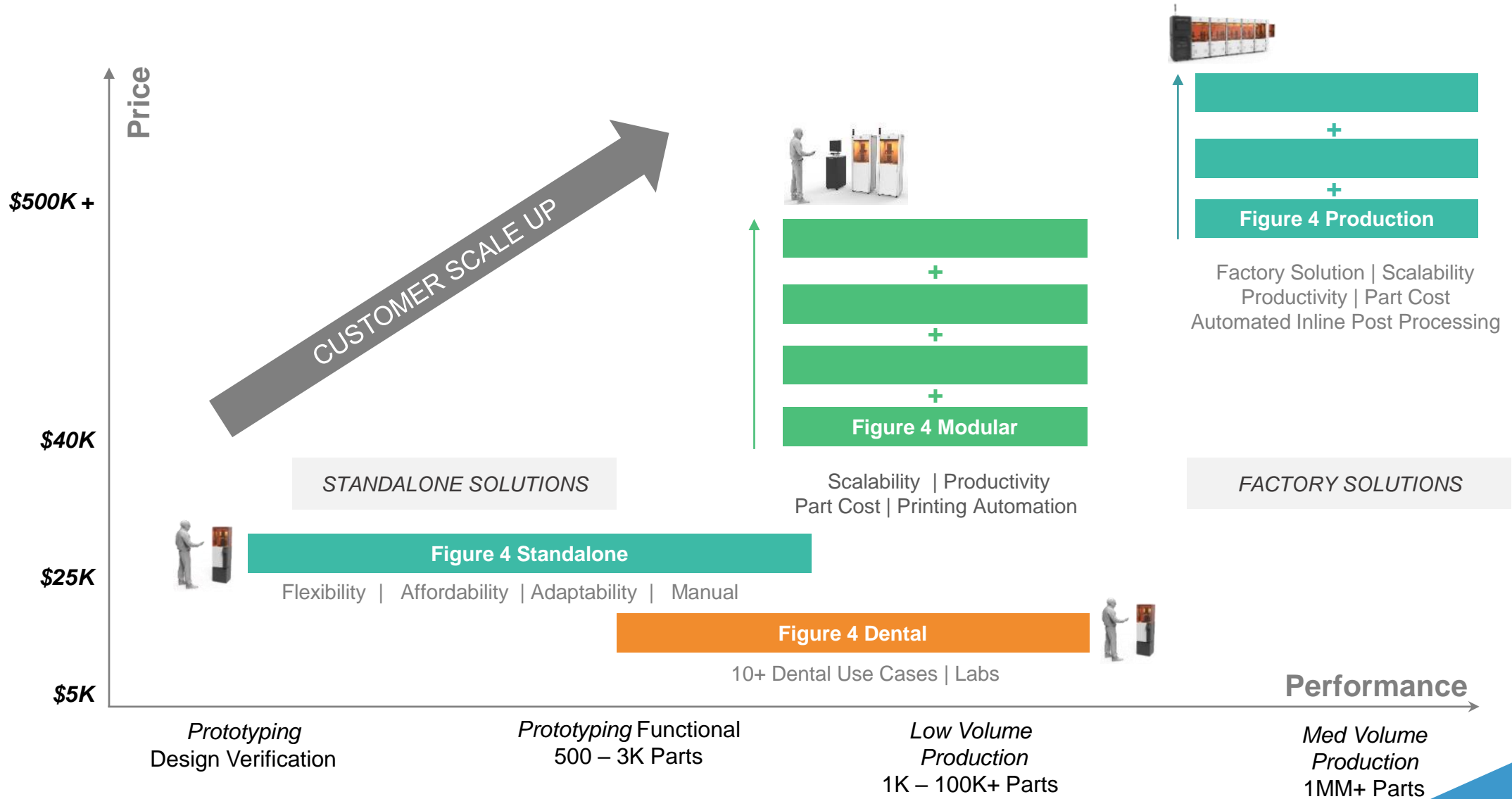**OEMS with High Volume**

Production Applications

Customizable

1MM+ parts/year

Inline post processing

Customers Grow with Us

Price

CUSTOMER SCALE UP

$500K +

$40K

STANDALONE SOLUTIONS

Figure 4 Production

Factory Solution | Scalability
Productivity | Part Cost
Automated Inline Post Processing

FACTORY SOLUTIONS

Figure 4 Modular

Scalability | Productivity
Part Cost | Printing Automation

$25K

Figure 4 Standalone

Flexibility | Affordability | Adaptability | Manual

Figure 4 Dental

10+ Dental Use Cases | Labs

$5K

Performance

Prototyping
Design Verification

Prototyping Functional
500 – 3K Parts

*Low Volume
Production*
1K – 100K+ Parts

*Med Volume
Production*
1MM+ Parts

Figure 4
Standalone Wins vs. Carbon

Wins on Materials - TCO - Productivity - Initial Investment

| Figure 4 : Industrial + Dental | **15** |
| Carbon | **7** |

Materials

| Figure 4 | **< $25K** |
| Carbon | **$120K+** |

Initial Purchase Price

| Figure 4 | **15-21% Lower** |
| Carbon | |

TCO & Part Cost

| Figure 4 | **20-40% Faster** |
| Carbon | |

Productivity

Provides customer choice to ramp-up based on volume

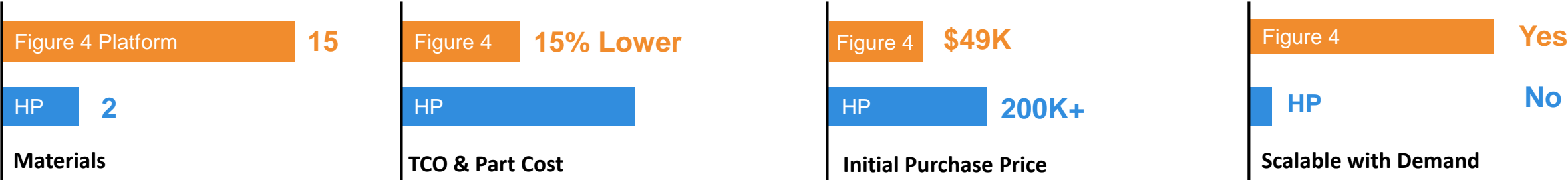Design Verification → Functional Prototype → Low Volume Production → 1MM+ Production
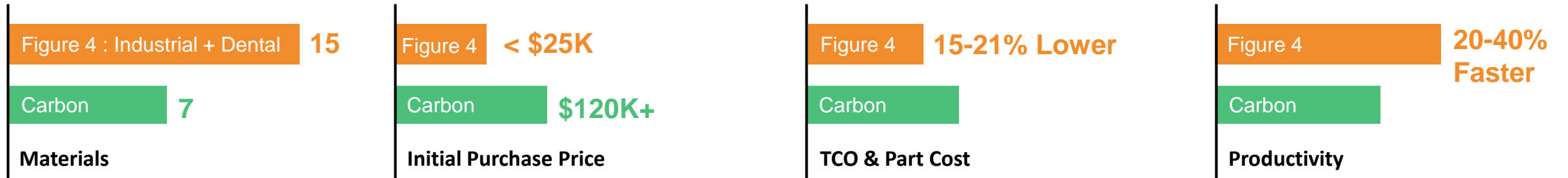
Figure 4 vs. Carbon

Functional parts under $25K | Scalable platform | Inline post processing | Broader use cases

Figure 4

Modular Wins vs. HP

Wins on Materials - TCO - Productivity - Initial Investment

| Figure 4 Platform | **15** |
| HP | **2** |

Materials

| Figure 4 | **15% Lower** |
| HP | |

TCO & Part Cost

| Figure 4 | **$49K** |
| HP | **200K+** |

Initial Purchase Price

| Figure 4 | **Yes** |
| HP | **No** |

Scalable with Demand

Figure 4 provides customer choice to ramp-up based on volume

Design Verification   Functional Prototype   Low Volume Production

Figure 4 Modular vs. HP MFJ

Functional parts under $50K | Scalable Platform | Ramps to Factory Production | Inline post processing

Introducing MJP Engineering-Grade Materials

New MJP Materials & Capabilities

VisiJet® M2G-CL (Armor)

Engineering material with excellent impact strength in a rigid ABS-like plastic

VisiJet® M2G-DU (ProFlex)

Engineering material with superior durability and flexibility in a semi-rigid PP-like plastic

VisiJet® M2R-GRY

High contrast material w/ improved visibility of fine detail

VisiJet® M2R-CL/WT and CR-CL/WT

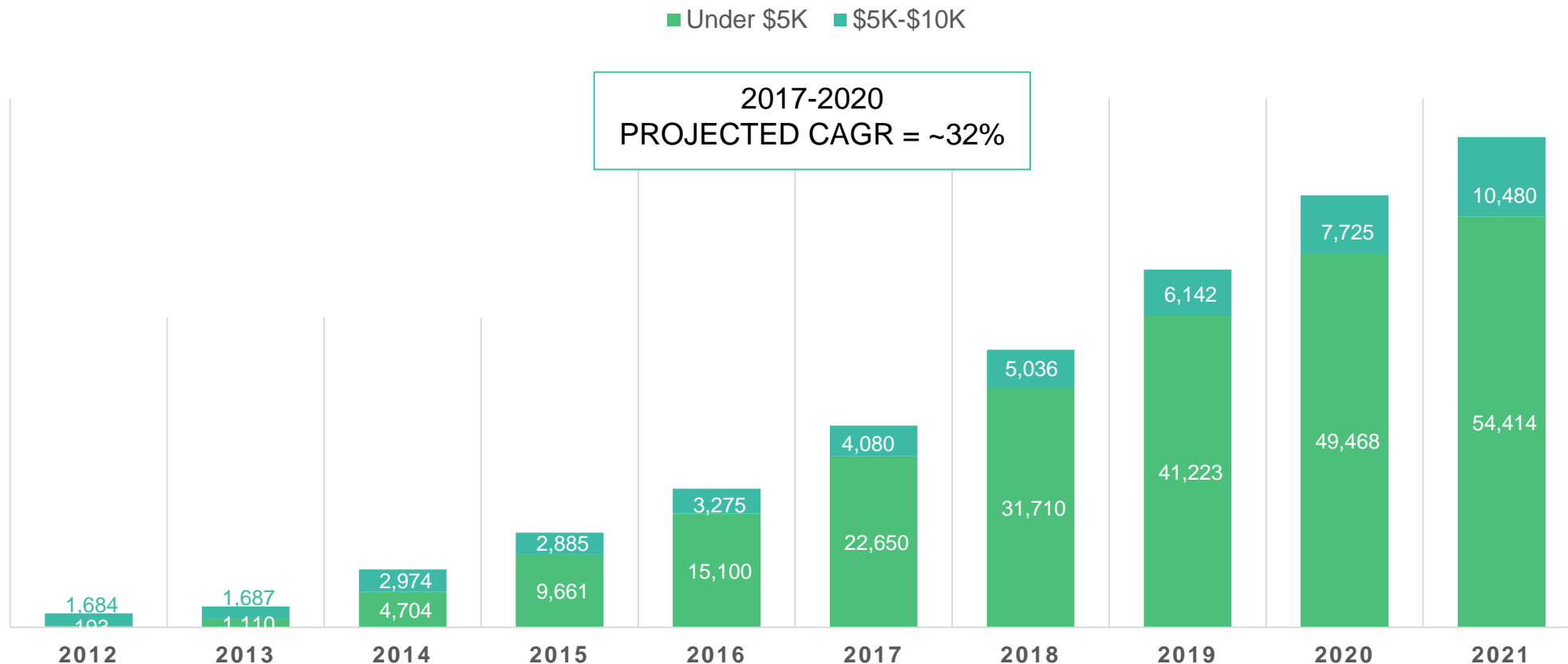Class VI capable materials ideal for medical applications

DLP Desktop
Is one of the fastest growing categories in Additive

DLP PROFESSIONAL UNITS UNDER $10K

■ Under $5K   ■ $5K-$10K

2017-2020
PROJECTED CAGR = ~32%

Year	$5K-$10K	Under $5K
2012	1,684	193
2013	1,687	1,110
2014	2,974	4,704
2015	2,885	9,661
2016	3,275	15,100
2017	4,080	22,650
2018	5,036	31,710
2019	6,142	41,223
2020	7,725	49,468
2021	10,480	54,414

Source: Context Data

FabPro™ 1000

An affordable, industrial desktop 3D printer solution
Seeds the market for Figure 4 adoption in the future

Small Job Shops | Design Shops
R&D departments | Engineers |
Jewelry Artisans & Fabricators
Emerging Geographies

ALL NEW

FabPro™1000
at $4990

Materials

FUNCTIONAL PROTOTYPING

TOUGH | ELASTOMER

SURGICAL GUIDE | CASTABLE

PROPRIETARY | PARTNERSHIPS

Sp **3D Sprint™**

Functional Materials

- Functional parts for 5K investment

- Directly leverage Figure 4 Development

- Material Design Center leadership

- Launching a range of Materials

- Use case specific, functional materials

- Fast, Tough, and Castable cover majority of use cases

- Materials portfolio will continue to expand post-launch

Materials Made for Quality
From tough engineering plastics to castable resins, the FabPro 1000 materials are designed for accuracy and quality
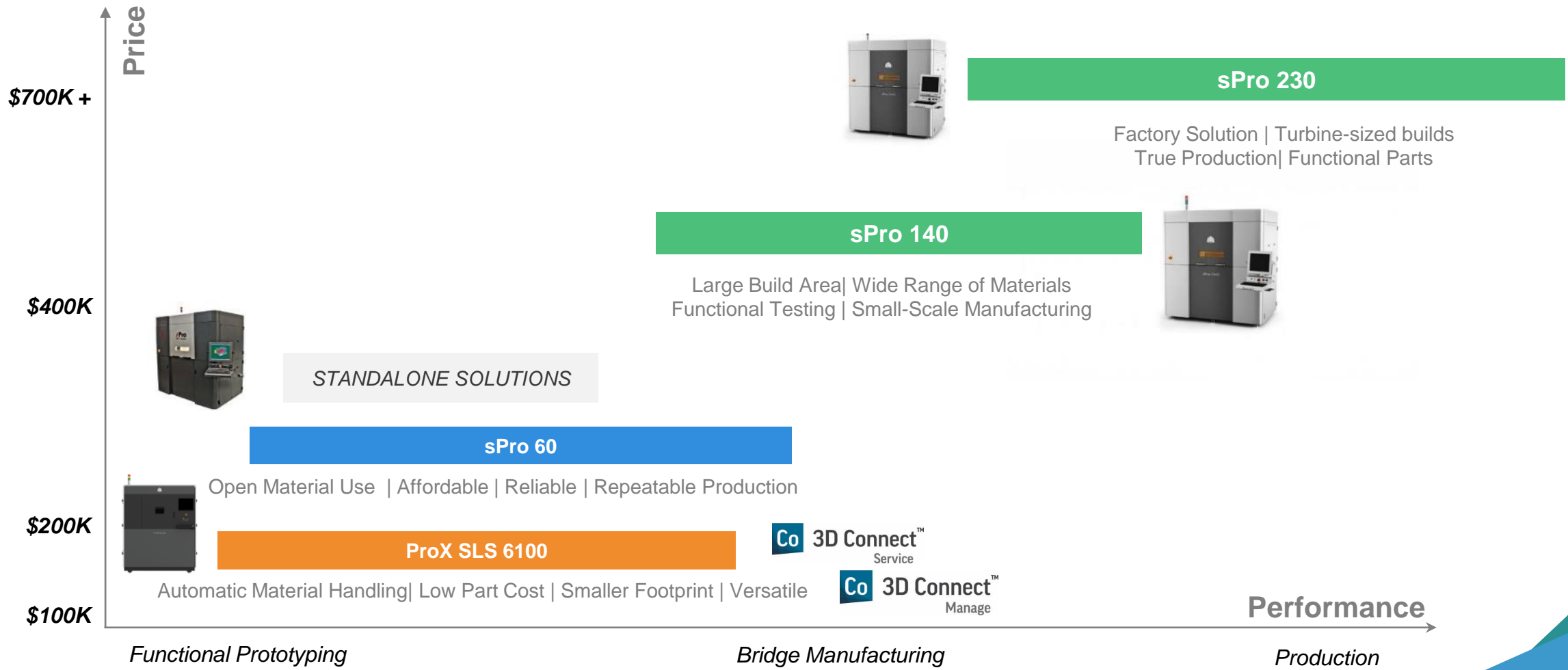
Customers Grow with Us

Price

CUSTOMER SCALE UP

$500K +

$40K

$25K

$5K

STANDALONE SOLUTIONS

FACTORY SOLUTIONS

+

+

+

Figure 4 Production

Factory Solution | Scalability
Productivity | Part Cost
Automated Inline Post Processing

+

+

+

Figure 4 Modular

Scalability | Productivity
Part Cost | Printing Automation

Figure 4 Standalone

Flexibility | Affordability | Adaptability | Manual

FabPro

Performance

Prototyping
Design Verification

Prototyping Functional
500 – 3K Parts

Low Volume
Production
1K – 100K+ Parts

Med Volume
Production
1MM+ Parts

SLS
From Prototyping to Full Production

Price

$700K +

sPro 230

Factory Solution | Turbine-sized builds
True Production| Functional Parts

sPro 140

$400K

Large Build Area| Wide Range of Materials
Functional Testing | Small-Scale Manufacturing

STANDALONE SOLUTIONS

sPro 60

Open Material Use | Affordable | Reliable | Repeatable Production

$200K

ProX SLS 6100

Co 3D Connect™
Service

Automatic Material Handling| Low Part Cost | Smaller Footprint | Versatile

Co 3D Connect™
Manage

$100K

Performance

Functional Prototyping   *Bridge Manufacturing*   *Production*

Broad Range of Production Materials

Overall Value Proposition

- Durable Nylon

- Broad set of 11 materials

- Faster custom application development by Material Design Center with 30 years of proven R&D expertise

- Repeatability Maximizes Small-scale Manufacturing

- Optimized recycle rates lower part cost

- Biocompatible materials for medical use

- Food-safe storage and handling

Customer Proven Materials

Glass-Filled Nylon

Mineral-Filled Nylon

Nylon 12

New SLS Materials & Capabilities
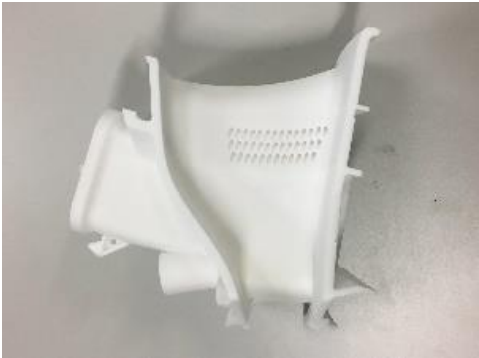
DuraForm® FR 1200

Flame retardant ideal for aerospace and durable good applications compliant with federal aviation regulation 25.853 - compartment interiors

DuraForm® AF+

Aluminum filled to yield a metallic finish ideal for consumer products and automotive applications
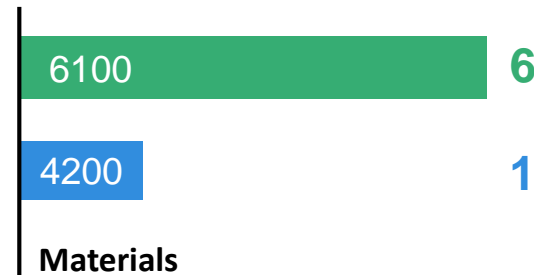
DuraForm® EX Black

High impact resistant nylon 11 ideal for consumer products and automotive applications excellent wear properties

ProX SLS 6100 Wins vs. HP

ProX SLS 6100 vs. HP MJF 4200

- Higher material count
- Larger build volume: more parts for every build
- 6 Industrial Materials vs. 1 from HP
- Large size printer format available
- 5 hour dyeing of parts not required
- Superior dimensional accuracy across small and large parts
- Superior part surface finish
- 3D Sprint provides enhanced capabilities
- 3D Connect provides full connectivity
- FDA certified food safe
- FAR certified for Aerospace

6100 **6**	6100 **Yes**
4200 **1**	4200 **No**
Materials	**Connected**
6100 **$200K**	6100 **0 hours**
4200 **$250K**	4200 **5 hours**
Acquisition Cost	**Post-Processing**

HP   **3DS**

3D SYSTEMS
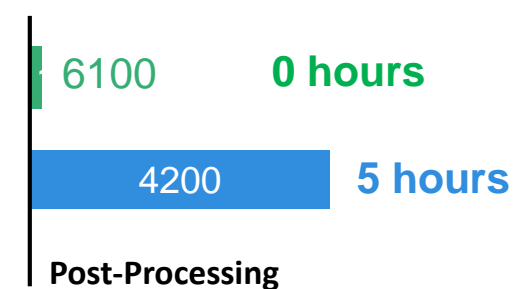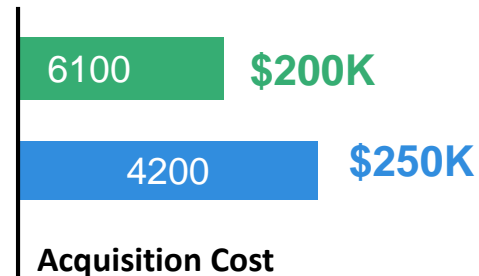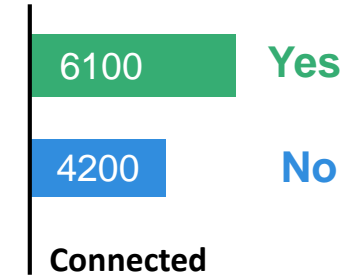
Introducing Precision Metals Platforms

DMP 8500 Factory Solution
## TARGET VERTICALS

Development Workflows

Production Workflows

R & D

Low Volume Production
(1 to 100 parts*)

Med Vol Production
(100 – 20,000 parts*)

Aerospace
444MM
TAM

Brackets, nozzles,
RF Filters, heat
exchangers

Healthcare
550MM
TAM

Orthopedic implants
Customized implants
Surgical Instruments

Industrial
330MM
TAM

Machinery components,
gas burners, heat
exchangers

Automotive
187MM
TAM

Exhausts, manifolds,
heat exchangers

Standalone

Factory
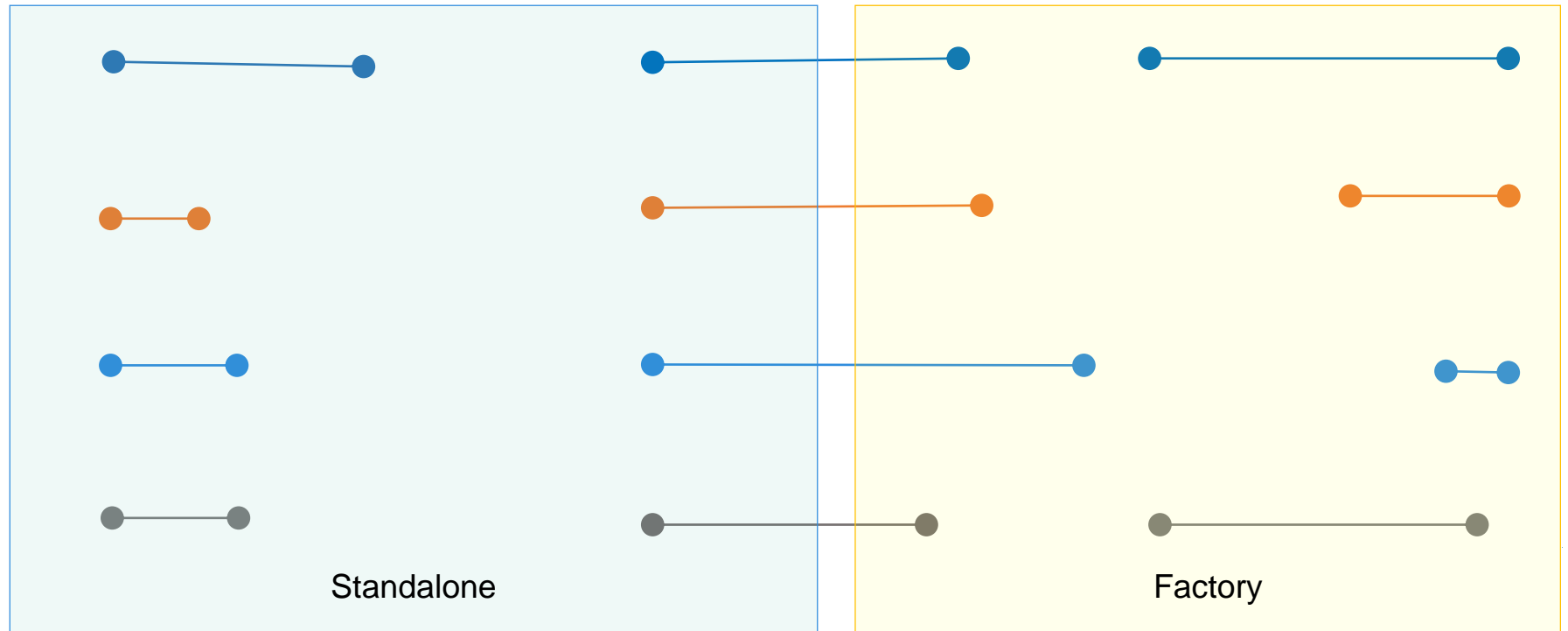
* dependent on part size

Precision Metal Printing Solutions

STANDALONE SOLUTIONS

Independent Printers | For R&D and Part Production

FACTORY SOLUTIONS

Scalable | High Level of Automation | Fully integrated modules

DMP 100 and 200

Education

Dental

Finest Detail

Best surfaces

Entry level DMP

DMP 320
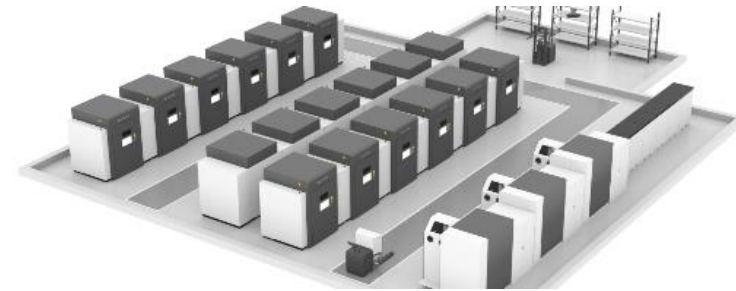
Healthcare | Aerospace

Industrial/contractors

Robust printer

Repeatable Quality

Low TCO

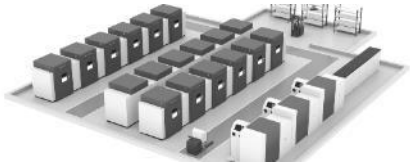### DMP 8500 Factory Solution

OEMs

Large part contractors

Medium volume production

Largest part diameter in the industry

Repeatable quality, high productivity, low TCO

Customers Grow with Us

Price

CUSTOMER SCALE UP

$1MM +

$600K — **ProX DMP 320**

$350K — **ProX DMP 200**

ProX DMP 100

$200K

Flexibility | Affordability
Adaptability | Manual

STANDALONE SOLUTIONS

Dental Use Cases | Labs

ProX DMP100, 200 Dental

DMP 8500

FACTORY SOLUTIONS

Factory Solution | Scalability
Productivity | Part Cost
Automated Inline Post Processing

Performance

Prototyping Functional

Low Volume Production
1K – 100K+ Parts

Med Volume Production
1MM+ Parts

DMP 8500
Scalable Factory Solutions

Modular, configurable, scalable factory setup

**1st** With 500x500x500 mm largest diameter in the industry

1st Seamless large parts

Uniform, repeatable quality

Low TCO and low per part cost

High Productivity

OEMs and large part contractors looking for:
Uniform repeatability, part quality
Affordable part cost/TCO
Scalability, including managing peaks
Service and Support, including application guidance
Process monitoring and traceability
Factory 4.0 – data-flow/logging/monitoring
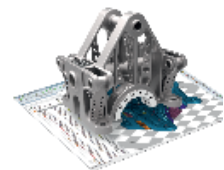
Xp 3DXpert™

Transport module with Removable Print Module (RPM)

Printer Module

Powder Management Unit (PMU) with Depowdering Module

Parking Module

Broad choice in LaserForm materials with extensively developed parameters

SOFTWARE | **HARDWARE MODULES** | **MATERIALS**

Expanding Our Suite of Workflow Software

3D Systems Software Strategy

1

From physical to digital

2

Build on strategic partnerships

3

Enable customers to get maximum results from their 3D Systems printer

DIGITIZE   DESIGN   SIMULATE   MANUFACTURE   INSPECT   MANAGE

3D Systems Software for Workflow

DIGITIZE · **DESIGN** · **SIMULATE** · **MANUFACTURE** · **INSPECT** · **MANAGE**

Geomagic for Solidworks, Wrap

Geomagic Design X

Geomagic Freeform

Subtractive

Cimatron

GibbsCAM

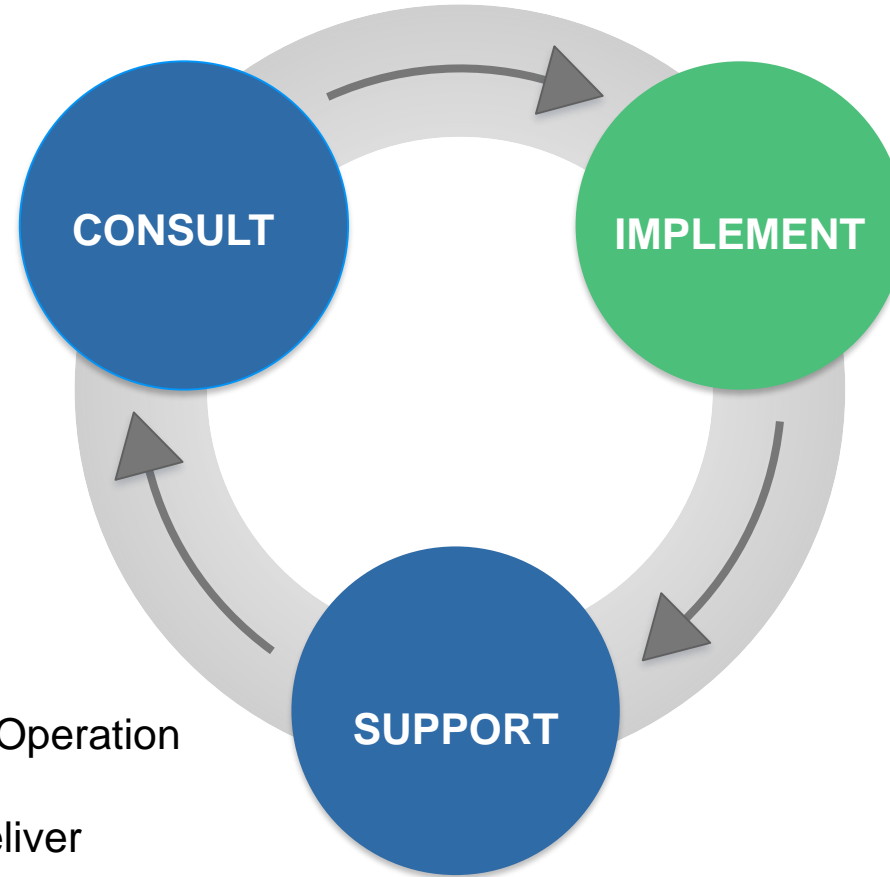*Additive*

3DXpert

3D Sprint

Geomagic Control X

3D Connect

Professional Services
Implementing Additive Manufacturing

- Build the business case: Additive Manufacturing primer and advanced consultation
- Specific 3D printing application consulting

CONSULT

IMPLEMENT

- Optimize parts design
- Assess and streamline manufacturing workflows
- Facility review and certification support

SUPPORT

- Optimize Total Cost of Operation
- 3D Connect Services
- Promise uptime and deliver preventative measures
- Production assurance

Cloud-Based Services

Co 3D Connect™
Manage

Fleet Monitoring

- Enables customers to see the status of their printer in real time
- Enables email and text alerts with their build or printer
- Creates analytics on uptime, usage, consumable use, health of the lasers/print heads etc.

ALL NEW

Co 3D Connect™
Service

Remote Diagnostic Tools

- Creates the ability for service to see what the problem is prior to going on site
- Automatically creates a service ticket
- Enable the ability to have the right spare parts ordered and on site prior to the tech arriving

ALL NEW

Customer Engagement Model

3D SYSTEMS

Herbert Koeck
**SVP and General Manager,
Go to Market**

Go To Market

Customer needs –> different sales motions

Route 1: Standalone solutions

- Sales cycles (<6 months)
- Prototyping environments
- Customer in early stages of AM
- Limited utilization
- Testing environments
- Regional (local)
- Customer making purchase

Route 2: Factory solutions

- Mid- to long-term (6-18 months)
- A solution sale - Services, printers, materials, software, application and certification knowledge
- Seller must have deep understanding of industry and customer use case
  - Healthcare, Aerospace, Dental …
- High degree of automation needs
- Backup and over-demand services part of the offering
- 24x7 operations
- International needs (across countries, departments)

Route to markets based on customer needs

Route 1: Standalone solutions

- Balance between direct sales and resellers, depending on product
- Ability in financing the deal
- Ability to support the customer
- Ability to buy and maintain demo units
- Application know-how
- Channel partners add value in certain geographies, certain language skills

Route 2: Factory solutions

- Mainly direct supplier – customer relationship
- Skills and capabilities to design solution for customers
- Infrastructure needed to demonstrate and proof concepts
- Customer Innovation Centers
- Certified production centers
- Application know-how around solutions, services, certifications and how to operate systems
- Ability to offer backup and over-demand services (On Demand Manufacturing)
- Service delivery across continents (Customer operating multiple sites)