



**CAPITAL
MARKETS DAY**
2022

SUSTAINABLE CONSUMER EXPERIENCES



Philippe LAUFER

Executive Vice-President, 3DS Global Brands,
Customer Value Engagement &
Chairman of Manufacturing Industries Sector

Philippe LOEB

Vice President Home & Lifestyle, CPG & Retail

MANUFACTURING SECTOR ECONOMIC WEIGHT

with Distribution & Services

↑ **3.3%**

2022-2028 GDP*

↑ **2.5%**

2022-2040 GDP*

Manufacturing Industries

Production only

20%
of GDP*

40%
of GDP*

\$50 Bn
PAM**

\$25 Bn
TAM**

50%
Of TOTAL
PAM**

* 2022-2040 forecasted GDP growth, source: Oxford Economics; % of Real WW GDP, base year 2015, source: Oxford Economics

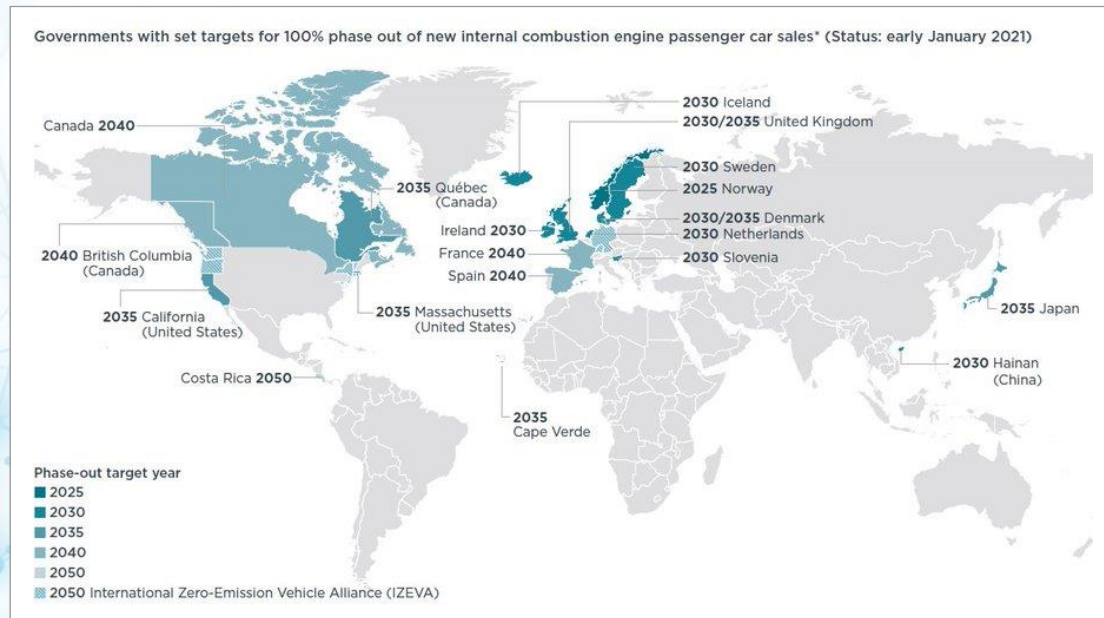
** PAM is the Potential Accessible Market and TAM is the Total Addressable Market; sources: Dassault Systèmes' internal sources

1 - FROM CARBON-DEPENDENT TO CARBON-NEUTRAL

“ THERE IS NO VACCINE AGAINST THE CLIMATE CRISIS, BUT WE STILL HAVE A CHANCE TO BUILD RESILIENCE IN THE FUTURE ”

FRANS TIMMERMANS,
VICE PRESIDENT OF
EUROPEAN COMMISSION

GOVERNMENTS WITH SET TARGETS FOR INTERNAL COMBUSTION ENGINE BAN



























AIRBUS ZERO EMISSION PROGRAMS



ELECTRIC MOBILITY EXAMPLE: DEVELOP VEHICLES MORE RESPECTFUL OF THE ENVIRONMENT

9 out of 10 EV Startups are
using 3DEXPERIENCE & CATIA

#	Name	Geo	Solutions
1	 TESLA		
2	 RIVIAN AUTOMOTIVE		
3	 NIO	 	
4	 WV Motor <small>WELTMEISTER</small>		NP
5	 NIKOLA <small>Powertrain</small>		
6	 XPENG Xiaopeng Motors		NP
7	 Faraday Future	 	
8	 LUCID		
9	 -chargepoint-		NP
10	 PROTERRA		

Customer Win XOS Trucks

Building 100% Battery-Electric Fleets with
3DEXPERIENCE Cloud

« New Way of Working & Connecting the Ecosystem »

“ The 3DEXPERIENCE Platform has enabled us to deliver much quicker to go to market, accelerate our development lifecycle and scale production ”

Dakota Semler,
CEO & Co-Founder

“ The 3DEXPERIENCE Platform allows us to collaborate efficiently with our value network by giving them access to our data, as we work with it live, securely ”

Matt Sommer, Senior Manager
Product Development



3DEXPERIENCE Platform provides a New Way of Working & Connecting the Ecosystem
& Connects the Dots between all Sustainability Domains

Source: <https://www.energystartups.org/top/electric-cars/>
NP= Not Public

DECARBONATION IMPACTS ALL MANUFACTURERS

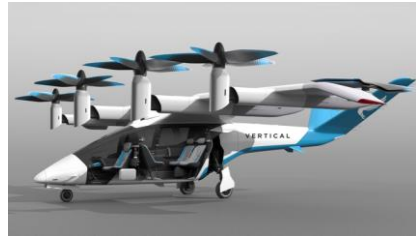
Requiring science-based Virtual Twin Experiences Provided by 3DEXPERIENCE

New Electric Mobility



 RIVIAN

New Air Mobility




VERTICAL

New Agriculture & Heavy Mobile Equipment



CLAAS

Ship propulsion and power generation



 **HYUNDAI**
HEAVY INDUSTRIES CO., LTD.

Food & Beverage




PEPSICO

2 - FROM PRODUCT TO EXPERIENCE THINKING



Numerous partnerships between historical car manufacturers and mobility platforms to face the new energy mobility revolution



Urban Air Mobility Market Projected to be as big as Commercial Aviation Market within 10 Years

3DEXPERIENCE TO MODEL, SIMULATE & OPTIMIZE END TO END EXPERIENCES



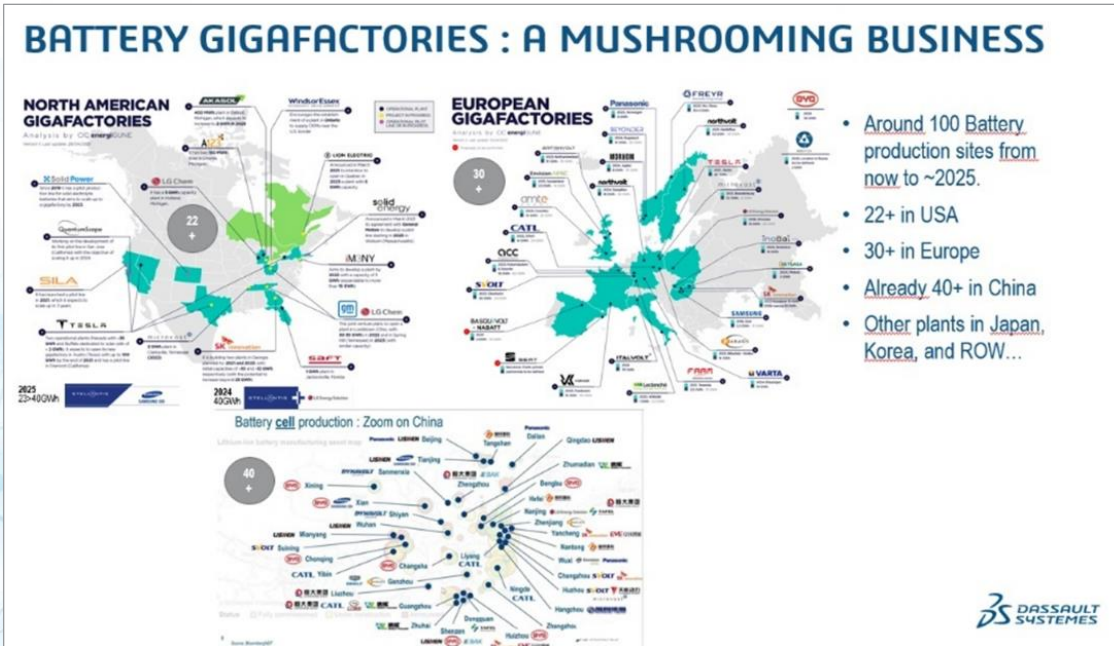
2022



CONSEQUENCE : NEED FOR SUSTAINABLE VALUE NETWORKS

100 NEW GIGAFACTORY PROJECTS
FOR 2025

MOBILITY IN HARMONY:
A NEW OPEN EV ECOSYSTEM
OF 1800+ MEMBERS
IN 56 COUNTRIES



MIH CONSORTIUM

Creating an Open EV Ecosystem that promotes Collaboration in the Mobility Industry

1,800+
MIH members since Oct 2020

56
Countries/Regions

Open Ecosystem
In order to accelerate Innovation, MIH welcomes all brands, developers, and auto supply chain to join the Open EV Alliance to build the Open EV Platform with collective wisdom.
#S2B #Chassis #Batteries #ADAS, #CyberSecurity #CloudConnectivity #BMS ...

Low Barriers of Entry
In order to develop reference designs and standards.

Resources for Growth
In order to guide business decisions and increase the odds of success, MIH empowers collaboration to share ideas, exchange insights through the Interest/Working Groups, as well as market insights, certification training, IP consultation and maturity assessment, ...

MIH Mobility In Harmony

MIH 開放平台

MIH members by FOCUS

June 2021

<https://www.mih-ev.org/en/index/>

46

SUSTAINABILITY IS ALSO A VALUE NETWORK TOPIC

The screenshot displays the 3DEXPERIENCE Sustainability Assessment interface. The main window is titled "Sustainability Assessment" and shows a comparison between two machine revisions: "New machine revision" (blue) and "Old machine revision" (green). The comparison is based on standardized methodologies (EF 3.0) and includes various environmental and social indicators. The "New machine revision" shows better environmental performance and lower weight.

Alternatives Comparison

Comparison Chart

Legend: ● New machine revision (blue), ● Old machine revision (green)

ENOVIA - Product Structure Editor - 2 Products

ID	Title	Revision
3B00-0025-1500_--Zufuehrung_Links	3B00-0025-1500_--Zufu...	B
3B00-0025-0372_--Handarbeitsplatz_3DX	Physical Product000012...	A
3M00-0024-7835_1-Station Messe	3M00-0024-7835_1-Stab...	A
3B00-0025-0481_--EP-Montage_STATION	3B00-0025-0481_--EP...	B
3B00-0025-0949_--Station EM2120_MESSE	3B00-0025-0949_--Stab...	B
3B00-0025-0950_--Prufstation_MODELL	3B00-0025-0950_--Prufs...	B
3A095484_--FTS	3A095484_--FTS 1	A

CATIA - 3D Compose - 2 Products

10 Machine modernization

Text: The comparison is done considering standardized methodologies (EF 3.0 in this case). The new machine revision has better environmental performances and lower weight

Footer: About 3DEXPERIENCE platform, Terms of Use, Privacy Policy

BENEFITS OF CLOUD FOR THE ENTIRE VALUE NETWORK



Collaborative data and model based
Enterprise platform

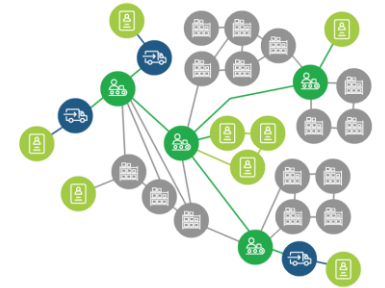
System Engineering everywhere

Virtual twin Experience of vehicle
(Hardware & Software)

Integrated Product and
Process Engineering

Virtual Twin Experience of
Manufacturing Operations

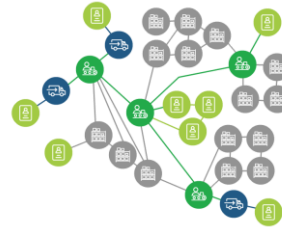
Scalable Secured Cloud always on &
Up-to-date for Renault and Value network



BENEFITS OF 3DEXPERIENCE CLOUD/MOBILE

- “An Innovation and business platform available for the entire enterprise, beyond engineering, to collaborate and break silos for quick decision making”
- “3D is a universal language across geographies :France, Japan, India, Romania,…”
- “Connecting People / Data / Processes”
- “Quick First deployments in costing / Quality with immediate value & ROI”
- “Data Science helps simulate opportunities for existing vehicles on the road, with immediate business benefits for RENAULT”
- “Cloud brings us speed in deployment, always up to date with latest technology (zero customization) , with real time growing relationship with the value network

BENEFITS OF CLOUD FOR THE ENTIRE VALUE NETWORK



80 Roles

- DESIGN
- SIMULATE
- MANUFACTURE
- MARKETING
- GOVERNANCE



From data to Information From Connections to Relationships Single Source of Truth Digital Continuity

←----- BUSINESS OUTCOME ----->

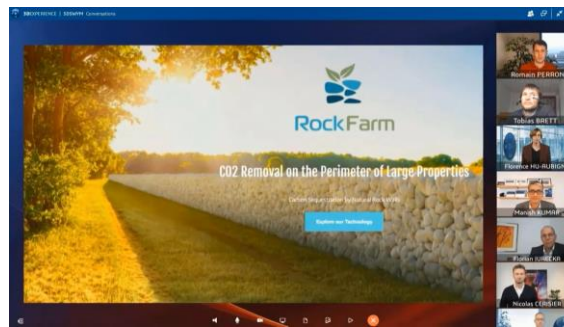
- Manage Complexity
Better Decisions
- Better Collaboration
More Innovation
- Agility
Higher Quality
- Automation
Resilience
Simplicity



“Smartflyer is a dynamic and innovative young company. A cloud based platform like 3DEXPERIENCE supports us 100% in our activity to focus on development and performance goals”



“No matter where the LID Boss team is working from and what stakeholder they need to connect with, the 3DEXPERIENCE Works portfolio on the Cloud has what they need to quickly respond to necessary changes”



“With primary business not being design, Naska Robotics is expert of materials, AI and vision. They build program to identify where to place their CO₂ capturing rock walls, still needing 3D to create and visualize things that don't exist yet”

EXPANDING TO EXPERIENCE ECONOMY

Value Creation

Value Experienced



Production
only

20%
of GDP

Production
+
Distribution
& Services

40%
of GDP

CONSUMER-DRIVEN ADOPTION

MANUFACTURING SECTOR TRANSFORMATIONS

- 1 DECARBONATION
- 2 EXPERIENCE THINKING
- 3 SUSTAINABLE VALUE NETWORKS

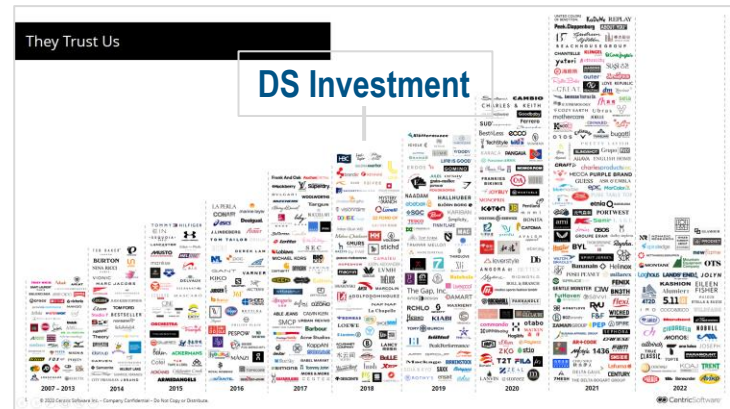


31 CONSUMER SEGMENTS

*ADOPTION
ACCELERATION*

3DS INVESTMENTS

- ✓ ECO DESIGN
- ✓ SMART PRODUCTS
- ✓ NEW FOOD
- ✓ REFORMULATION
- ✓ PRODUCT-HUMAN EXPERIENCE TWIN
- ✓ RETAIL OPTIMIZATION
- ✓ RETAIL PLM
- ✓ VIRTUAL LAB & PRODUCTION SCALE-UP
- ✓ SUPPLY AGILITY



~550
COMPANIES

4,500+
BRANDS TRUST
CENTRIC PLM

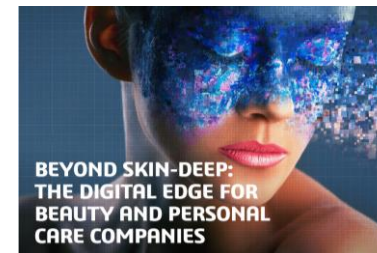
**'THE RIGHT PRODUCTS'
WITH CENTRIC PLM**



**'THE PRODUCTS RIGHT'
WITH 3DEXPERIENCE**

SHISEIDO

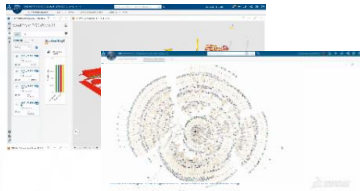
PEPSICO



**DASSAULT
SYSTEMES**

USAGE INTELLIGENCE POWERED BY 3DEXPERIENCE PLATFORM

3 - DATA SCIENCE EXPERIENCES



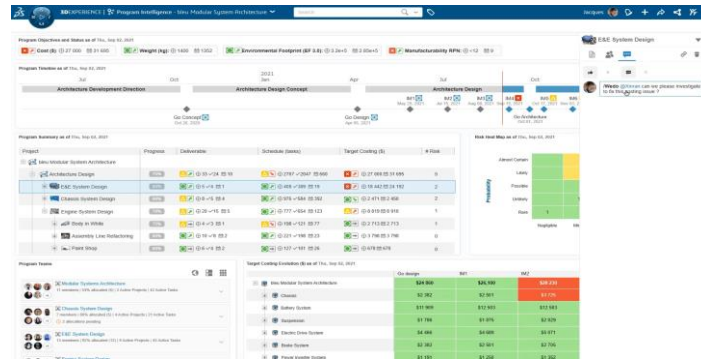
2 - SEMANTIC MODEL



1 - ELEVATE DATA SOURCES



Engineer with and for business Performance



Accelerate Manufacturing and supply chain performance



Transform user interaction with Customer Experience Intelligence



Gulfstream

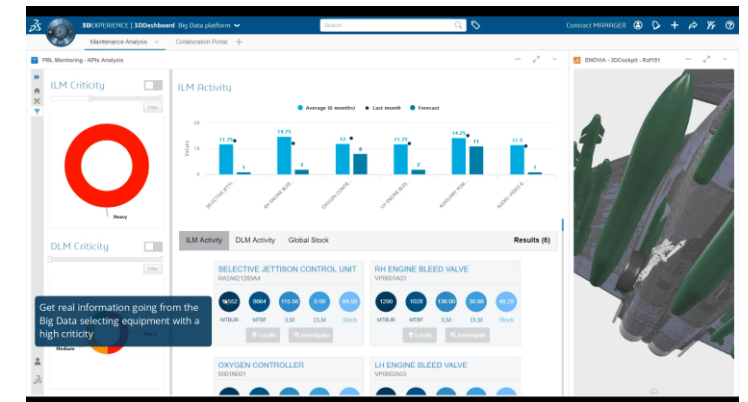
Learn & accelerate client satisfaction with Quality Intelligence



Deliver Fleet Performance



Understand market trends & demand



TAKE AWAY | THE WORDS OF OUR CLIENTS

Manufacturing Sector Industries are Accelerating their Transformation

- Imperative to be First Class Citizen to Adopt New Regulations
- Imperative to Transition to Circular Experience economy

Creating Large and Diversified Market Opportunity and Demand

Dassault Systèmes is Well Positioned to Take Substantial part of this Growth

- Installed Base and its Value Network – Value up and Wide
- Gaining the Heart of the Industry Shakers – Value Engagement

3DEXPERIENCE Platform is Proven to Address Manufacturing Industries Challenges

- A Science based Innovation Platform
- A Business Platform Connecting People, Data and Ideas
- Cloud Adoption at large with Proven ROI