INVESTOR AND ANALYST DAY
June 10, 2014

MANUFACTURING THE FUTURE
WELCOME

Stacey Witten
Director, Investor Relations

MANUFACTURING THE FUTURE
FORWARD LOOKING STATEMENTS

This presentation contains forward-looking statements, as defined by federal and state securities laws. Forward-looking statements include statements concerning plans, objectives, goals, strategies, expectations, intentions, projections, developments, future events, performance or products, underlying assumptions, and other statements which are other than statements of historical facts. In some cases, you can identify forward-looking statements by terminology such as "may," "will," "should," "hope," "expects," "intends," "plans," "anticipates," "contemplates," "believes," "estimates," "predicts," "projects," "potential," "continue," and other similar terminology or the negative of these terms. From time to time, we may publish or otherwise make available forward-looking statements of this nature. All such forward-looking statements, whether written or oral, and whether made by us or on our behalf, are expressly qualified by the cautionary statements described on this message including those set forth below. In addition, we undertake no obligation to update or revise any forward-looking statements to reflect events, circumstances, or new information after the date of the information or to reflect the occurrence or likelihood of unanticipated events, and we disclaim any such obligation.

Forward-looking statements are only predictions that relate to future events or our future performance and are subject to known and unknown risks, uncertainties, assumptions, and other factors, many of which are beyond our control, that may cause actual results, outcomes, levels of activity, performance, developments, or achievements to be materially different from any future results, outcomes, levels of activity, performance, developments, or achievements expressed, anticipated, or implied by these forward-looking statements. As a result, we cannot guarantee future results, outcomes, levels of activity, performance, developments, or achievements, and there can be no assurance that our expectations, intentions, anticipations, beliefs, or projections will result or be achieved or accomplished. These forward-looking statements are made as of the date hereof and are based on current expectations, estimates, forecasts, and projections as well as the beliefs and assumptions of management. 3D System’s actual results could differ materially from those stated or implied in forward-looking statements. Past performance is not necessarily indicative of future results. We do not intend to update these forward looking statements even though our situation may change in the future. Further, we encourage you to review the risks that we face and other information about us in our filings with the SEC, including our Annual Report on Form 10-K which was filed on February 28, 2014. These are available at www.SEC.gov.
# AGENDA

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3DS – PRINTING 2.0

Avi Reichental
President and CEO

MANUFACTURING THE FUTURE
TRENDS DRIVING ADOPTION AND GROWTH

FREE COMPLEXITY DRIVES FUNCTIONALITY

SURGERY & MEDICAL DEVICES BECOME PERSONALIZED

DESIGN & MANUFACTURING ARE RE-IMAGINED

3D LIFESTYLE BECOME UBIQUITOUS
SIZING UP THE OPPORTUNITY

Source: Gartner, Forecast: 3D Printers, Worldwide, 2013

## OUR FIRST MOVER ADVANTAGE

<table>
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<tr>
<th>Design</th>
<th>Direct prototypes plastic</th>
<th>Direct prototypes metal</th>
<th>Indirect prototypes</th>
<th>Cloud Printing</th>
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<td>Medical parts</td>
<td>Direct parts</td>
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<td>Software</td>
<td>Perceptual devices</td>
<td>Cloud platforms</td>
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<td>Hardware</td>
<td>Consumer printers</td>
<td>Industrial printers</td>
<td>Materials</td>
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OPEN ENDED GROWTH OPPORTUNITY

3D printing today as a % of the manufacturing market

$10.5tn
$2bn

100%

0.1%

Manufacturing market
3D printing market

Opportunity

“The global economy is worth about $70 trillion, and manufacturing accounts for more than 15%, which is $10.5tn.

If AM grows to capture just 2% of this global manufacturing market, that’s $210bn”

Source: Wohlers 2014
# Differentiated Business Model

<table>
<thead>
<tr>
<th><strong>Others</strong></th>
<th><strong>Ours</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>✗ Extract maximum value from customer</td>
<td>✓ Deliver ongoing customer success</td>
</tr>
<tr>
<td>✗ Sell a technology or a product</td>
<td>✓ Sell the complete solution</td>
</tr>
<tr>
<td>✗ Sacrifice everything for temporary growth</td>
<td>✓ Cash matters, unprofitable growth doesn’t</td>
</tr>
<tr>
<td>✗ Protection through patents</td>
<td>✓ Protection through ‘integrated sticky’ value</td>
</tr>
<tr>
<td>✗ Run several unintegrated businesses</td>
<td>✓ Run one business, address multiple needs</td>
</tr>
<tr>
<td>✗ Improve existing products</td>
<td>✓ Create entirely new products and categories</td>
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DIVERSE-EXPERIENCED-ENTREPRENUERIAL

Ziad Abou
VP & General Manager
Quicksarts

Andy Christensen
VP, Personalized Surgery &
Medical Devices

Hugh Evans
VP, Corporate Development &
Ventures

Ping Fu
Chief Entrepreneur Officer

Damon Gregoire
SVP, Global Operations & Chief
Financial Officer

Chuck Hull
EVP & Chief Technology Officer

Calvin Hur
VP & General Manager Geomagic
Solutions

Andy Johnson
VP, General Counsel & Secretary

Diana Kalisz
VP, Chief Product Officer

Neal Orringer
VP, Alliances & Partnerships

Avi Reichental
President & CEO

Michele Marchesan
VP, Chief Opportunity Officers

Kevin McAlea
SVP, Chief Impact Officer

Karl Meyer
VP, Entertainment

Rajeev Kulkarni
VP, General Manager Consumer
Products

Cathy Lewis
VP, Chief Marketing Officer

Kevin Williams
VP Global Engineering & Chief
Development Officer
DIGITAL THREAD FROM END TO END

Capture
Create
Print
Provide
OUTLOOK

Damon Gregoire
SVP, Chief Financial Officer

MANUFACTURING THE FUTURE
REVISED FULL-YEAR 2014 GUIDANCE

• We expect annual revenue for 2014 to be in the range of $695 million to $735 million with greater growth during the second half of the year.

• We expect our GAAP earnings per share to be in the range of $0.44 to $0.56 and our non-GAAP earnings per share to be in the range of $0.73 to $0.85 with greater earnings during the second half of 2014.

• Our non-GAAP adjusted earnings guidance is fully tax-effected and inclusive of all acquisitions and equity raise completed to date and the expected closing of Robtec.
FAVORABLE DYNAMICS
POSITIONED AT THE HEART OF ~$35 BILLION DESIGN-TO-MANUFACTURING VALUE-CHAIN\(^1\)

FAVORABLE DYNAMICS
- Open Ended Economic Possibilities
- Unmatched Innovative Stimulation
- Far Reaching Social Impact

FACTORS ACCELERATING ADOPTION
- Greater R&D spend, democratization
- Shorter product life cycles, frequent changes
- Demand for higher quality and complexity
- Reshoring, labor costs and skills shortage
- Drive for efficiency and sustainability

3D PRINTING GROWTH\(^2\)
- $3.07 Billion (2013)
- $21.0 Billion (2020)
- 32% CAGR

Source: 2013 Product lifecycle management Market per CIMdata

(1) Source: 2013 Product lifecycle management Market per CIMdata
(2) Source: Wohler’s Associates, Inc.
EXPECTING ACCELERATED REVENUE GROWTH

- Revenue doubles in two years from 2013, driven primarily by printers, materials and software powered perceptual devices
- Gross profit margins reach levels of 55% to 60% as we get firmly into the $750 million to $1 billion revenue run-rate
- Sales and marketing expenses increase incrementally with revenue growth
- R&D expenses returns to about 8% of revenue
- Operating leverage returning later in 2014, and expanding in second half of 2015

*based on business today, excluding future acquisitions and opportunities
GROSS PROFIT MARGIN EXPANSION DRIVERS

- Increasing GPM contribution from higher software and materials revenue
- Expanding GPM from higher healthcare revenue and expanding services GPM
- Recovering 3D printers GPM post condensed new product launch period
- Improving overhead absorption and capacity utilization from scale
3DS – HEALTHCARE

Oren M. Tepper, MD, Montefiore Medical Center
Assistant Professor of Plastic Surgery, Director of Craniofacial Surgery
Andy Christensen, Vice President, Personalized Surgery and Medical Devices

MANUFACTURING THE FUTURE
Virtual Surgical Planning for Craniofacial Surgery

Oren M. Tepper, MD
Montefiore Medical Center
Assistant Professor of Plastic Surgery
Director of Craniofacial Surgery
PLASTIC SURGERY

• Build, Restore, Renovate
• Creative, Innovative surgical specialty
SURGICAL INNOVATION

- Training / Skills
- Advanced techniques
- Cutting edge technology
- PLANNING?
SURGICAL PLANNING

Soft tissue  Bone

Medical Modeling
skeletal planning of osteotomy in our face transplant patient,” he says. “It’s been a long time – but we’re now discovering more exciting applications and seeing more widespread use, so we’re looking at 3-D printing a little differently than we did back then.”

Assistance to the max

Oren Tepper, MD, Bronx, N.Y., attending surgeon in the Division of Reconstructive and Plastic Surgery at Montefiore Medical Center, says 3-D printing of maxillofacial models that can be deployed in the O.R. are becoming the standard of care for some facets of head and neck reconstruction.

He believes that using this technology to map the anatomy of a patient with craniofacial injuries and post-traumatic deformities, and to develop a surgical plan prior to arriving at the O.R., eliminates surprises, minimizes complications and improves the precision of surgery.

“For complex reconstruction in kids, I’ve been printing these models and guides to help me position and perform the reconstruction,” he says.

Dr. Tepper notes that 3-D really got off the ground with simple printings of the skull – which surgeons found quite useful. “Then it became printing an idealized skull of what you were trying to achieve, and now it’s made its way into not just printing something you can look at as a reference, but actually printing something you can use to guide where you make the cuts, how you put the bones together and how you do the reconstruction,” he says.

Dr. Tepper published a case study in the International Journal of Pediatric Otorhinolaryngology about a 3-week-old girl who had difficulty breathing due to a small lower jaw. By using virtual planning technology, he created 3-D computer

Continued on page 34
EVOLUTION OF 3D

3D CT Scan → Medical Modeling → 3D Model

Planning Session

OR Reference

Surgical Simulation → Virtual Guides/Models → Surgical Guides / Jigs
FACIAL FRACTURES

Use of Virtual 3-Dimensional Surgery in Post-Traumatic Craniofacial Reconstruction

Orin M. Tepper, MD,a Sarah Sorice, BA,b
Gabriel N. Herskowitz, DDS,c Pierre Saadeh, MD,d
Jamie P. Levine, MD,e and David Hirsch, DDS, MDf
Fracture reduction and establish occlusion
PHASE 2 - MODELING

- Bandeau jig
- Orbito-zygomatic jig
- Bone graft template
- Splint
CRANIOFACIAL DISTRACTION
MANDIBULAR DISTRACTION
VIRTUAL SURGERY

Solves the existing issues with mandibular distraction surgery

(1) Device size
(2) Underdeveloped bone
(3) Critical structures
(4) Bone width
Preop

Postop – 10 months
FUTURE GROWTH POTENTIAL

Better, Faster

Expanding Market

Soft tissue
Bone
REAL TIME COMMUNICATION
PERSONALIZED SURGERY
ANATOMICAL MODELING
PERSONALIZED SURGERY
GUIDANCE AND CUSTOM DESIGNS
DIGITAL THREAD™ - Virtual Surgical Planning (VSP™)

1. Digital Medical Imaging
2. Image Processing
3. Virtual Surgical Planning
4. Haptic Design
5. 3D Printing
6. Personalized Surgery
THE VALUE PROPOSITION
PERSONALIZED SURGERY

Stakeholders

The Patient - “I want the best surgery possible, personalized to me”

The Surgeon - “I need to provide the best care possible to my patients while optimizing how much I can do in a day”

The Hospital - “To remain competitive we must cut cost while maintaining a high level of care”

The Insurance Co - “We will continue to fund a high level of care for our patients but at a decreasing rate and new treatments must demonstrate value”

The Medical Device OEM - “To remain competitive we must innovate and provide better care at a diminishing selling price”

3DS Digital Thread Plays a Role

THE VALUE PROPOSITION
PERSONALIZED SURGERY
THE FDA’S VIEWPOINT

“3D printing is transforming our concept of personalized medicine and medical intervention opportunities”

- FDA Commissioner Margaret Hamburg quoted during an October 29, 2013 AdvaMed-Dx and American Association for Cancer Research meeting on personalized medicine in Washington, D.C.
VOLUME PRODUCTION DRIVING VALUE
DIRECT METAL PRINTING
PATIENT-SPECIFIC IMPLANTS
OFF-THE-SHELF 3D PRINTED IMPLANTS
BESPOKE BRACING - SCOLIOSIS
3DS – BREAKING THE SPEED LIMIT

Cathy Lewis, CMO
Patrick Dunne, Director, Industrial Developments

MANUFACTURING THE FUTURE
COMPLEXITY IS FREE
3DS / GOOGLE’S ARA

Jeff Blank, Vice President Engineering, New Business Development

MANUFACTURING THE FUTURE
STYLIZING AND PERSONALIZING

Generator
Constrained generators for user-unique textures & patterns

Freestyle
 Entirely user-designed, with no ID constraints

Pop
Energetic pop color combined with neutral

Monochrome
Varying shades of same color (gray phone style)

Solid
All modules same color

Luxe
Use of high end premium material
3DS – ENGINEERING 2.0

John Alpine, Vice President, Global Software
Josh St. John, Director, User Experience

MANUFACTURING THE FUTURE
REIMAGINING THE ENGINEER’S DESKTOP
3DS – LIFESTYLE 1.0

Ash Martin, Director, Consumer Product Management
Liz von Hassel, Creative Director, Food Products
OPENING NEW SEGMENTS
CREATIVE DIGITAL THREAD
CONSUMER LIFESTYLE
EXPANDING CHANNELS
Andrew Vaz, Principal, Chief Innovation Officer, Deloitte
Marcus Shingles, Principal, Eco-Systems and Exponentials Leader, Deloitte
DELOITTE DISCOVERY CENTER
3DS – METAL PRINTING

Kevin McAlea, Chief Impact Officer

MANUFACTURING THE FUTURE
WHY 3DS 3D DIRECT METAL PRINTING?

Mass Customization

Design for Performance

Challenging Parts

Challenging Materials

QUALITY | MATERIAL VERSATILITY | MANUFACTURING READY | GLOBAL SUPPORT
MATERIALS VERSATILITY

15+ MATERIALS | STEEL | ALUMINUM | NI-BASED ALLOYS | PRECIOUS METALS

CoCr | AlSi2 | Pure Cu | Al2O3
MANUFACTURING APPLICATIONS

- Tire Molds
- Medical & Dental
- Aerospace & Defense
- Jewelry
<table>
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<th>Feature</th>
<th>Specification</th>
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<tr>
<td>Feature Resolution</td>
<td>~ 150 microns</td>
</tr>
<tr>
<td>Surface Finish</td>
<td>~ 5 microns $R_a$</td>
</tr>
<tr>
<td>Tolerances</td>
<td>~ 50 to 100 microns</td>
</tr>
<tr>
<td>Repeatability</td>
<td>~ 30 microns</td>
</tr>
<tr>
<td>Density</td>
<td>~ 99%</td>
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TIRES: SIPE, PUZZLE & SEGMENTED MOLDS

- Difficult sipe geometries, sipe-dense molds
- 4X faster than conventional manufacturing
- More durable than conventional mold with inserts
- Internal lattice structure maximizes accuracy and minimizes build time
UNIQUE CAPABILITIES

- Application-Specific Build Strategies
- Resolution & Surface Finish
- Accuracy + Speed
- Know-How & Experience
FAB-GRADE READY PRINTER

- Robust design & construction
- Emphasis on precision, repeatability and reliability
- Unique powder layering system
- Advanced scan strategies
- Integrated “hands off” powder management
THE TIRE MOLD OPPORTUNITY
“With the quick turnaround we deliver using direct metal sintering, we have also built a reputation for high quality and attention to detail that pleases our dental customers. We own about 90% of the dental laser sintering market in our region, and we plan to keep building with the ProX from 3D Systems.”

— Michal Hermanek, founder and owner of MicroDent
FAB-GRADE DIRECT METAL PRINTING

HIGH DENSITY | METAL PURITY | 15 MATERIAL CHOICES | DETAIL AND PRECISION
3DS – QUICKPARTS 2.0

Avi Reichental
President and CEO

MANUFACTURING THE FUTURE
Showcase includes:

- ProJet® 4500 full color plastic 3D printer
- ProJet® 5500X multi material
- Cube®
- CubePro™
- ProJet® 1200 micro-SLA
- Perceptual Design and Devices: Capture™, Touch™, Sense™, Geomagic® Software Suite
- Full Parts Display
Q & A

MANUFACTURING THE FUTURE