



3DEXPERIENCE[®]

Capital Market Day 2016

Expanding in Consumer Packaged Goods & Retail



Philippe Loeb
CPG-RETAIL Industry VP

CPG & RETAIL : a Huge Potential Market

Large accounts : 488
SMB : 175k

BRAND MANUFACTURERS

167	47k	7.1 FOOD & BEVERAGE	15	2k	7.3 HOUSEHOLD PRODUCTS	40	3k	7.2 BEAUTY & PERSONAL CARE

PACKAGING	40	20k	7.4 PACKAGING					
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RETAILERS	170	29k	7.5 GENERAL RETAILERS				56	71k	7.6 SPECIALTY RETAILERS			
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With Global & Local Players

Example : China

BRAND MANUFACTURERS

7.1 FOOD, BEVERAGE & TOBACCO



7.3 HOUSEHOLD PRODUCTS



7.2 BEAUTY & PERSONAL CARE



PACKAGING

7.4 PACKAGING



RETAILERS

7.5 GENERAL RETAILERS



7.6 SPECIALTY RETAILERS



CPG : Growing,

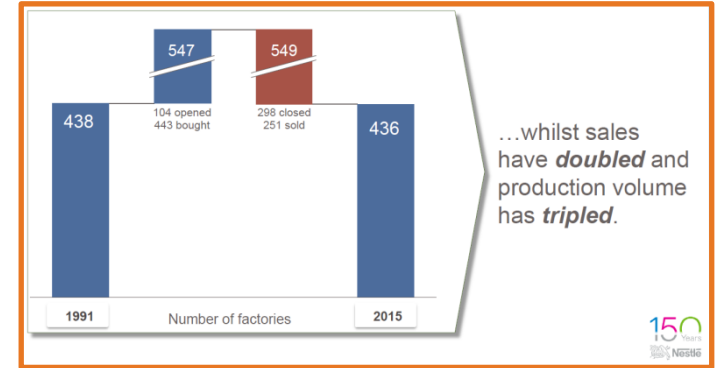
“Imagine, if you will, that over the next decade the world will gain an additional 81 Procter & Gambles or 458 equivalents of Kellogg’s.

This is the sort of growth that will happen in the global consumer-packaged-goods (CPG) sector, which will nearly double in size to **\$14 trillion—by 2025, from \$8 trillion in 2014.**”

Source : Mc Kinsey,
June 2015



Industrial Companies



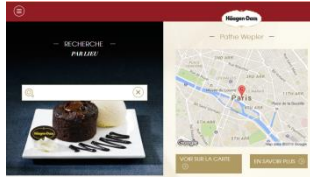
Nestlé : 436 factories

P&G : 100+ production facilities

SAVENCIA : 70 factories

Consumer & Shopper Experience at the Center

Service Experience



Usage Experience



Ownership Experience



EXPERIENCE THINKING

Content Experience



Awareness Experience

Product Experience



Shopping Experience

Challenge : Greater **Unpredictability** of New Consumers



2025 consuming class:

- ▶ **3 billion**
- ▶ **2/3 in 600 mega cities**
 - ▷ **Vanishing borders**
- ▶ **Technologies disruption**
 - ▷ mobile, IoT, AI, materials, genomics
- ▶ **Non-linear shopping trips**
 - ▷ **Last mile** distribution challenge

Challenge : From Wealth to

Health & Wellness



Health now #1 consumers concern in China and India



Wellness : physical, mental, social



Unprecedented demographic changes



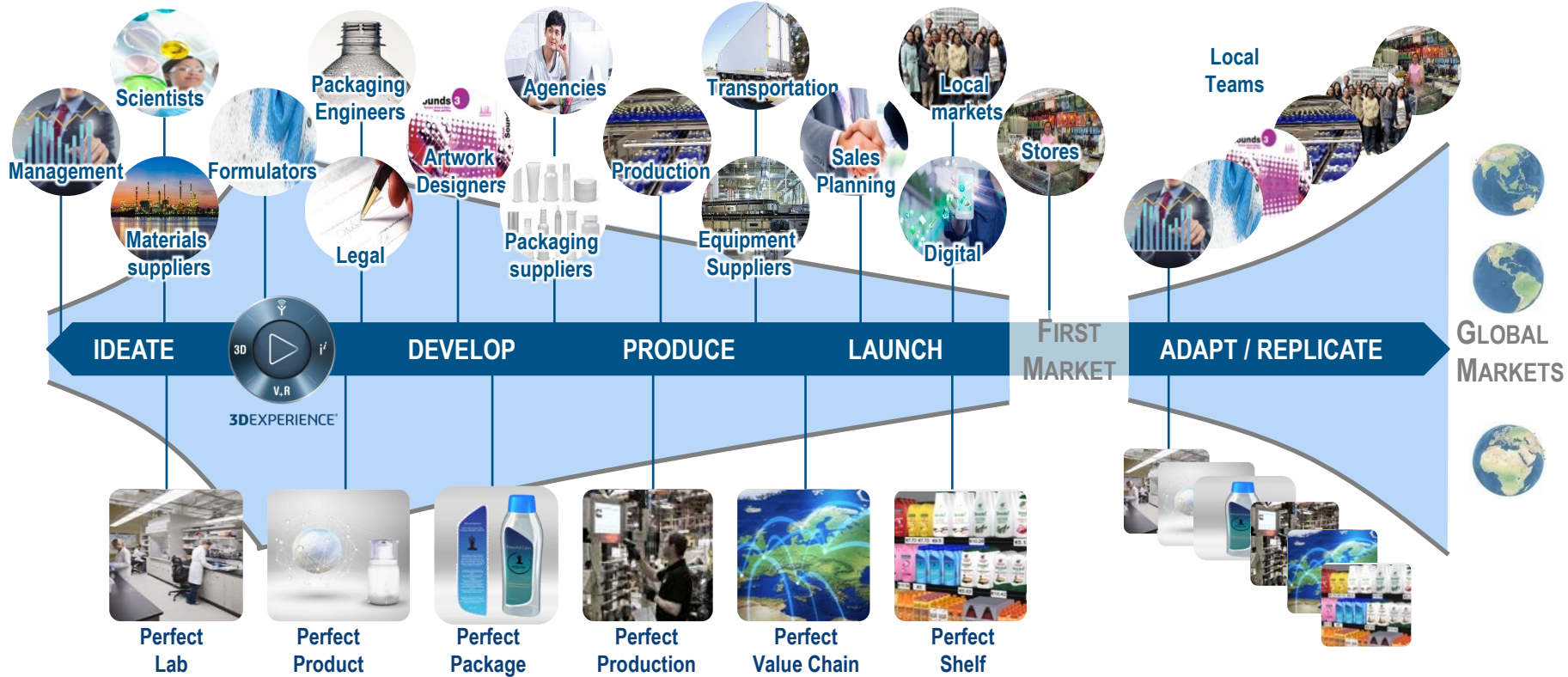
More trust in Local and Digital players than Global companies



- ▶ Reduced environmental **footprint**
- ▶ **Convergence with Life-Sciences:** new Players, new Technologies
- ▶ **Revisited** (reduced) **portfolio**
- ▶ More **comprehensive relationship with the consumer**
- ▶ End-to-end **transparency**, 'from farm to fork'

DS has built a Unique Portfolio for CPG-RETAIL

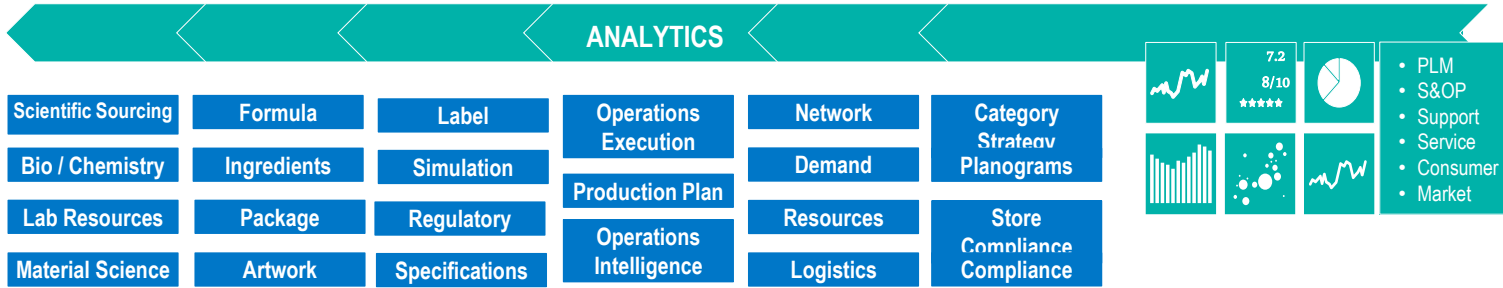
“Simplifying Collaborative Innovation”



Thanks to Continuous Investments

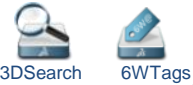


Connected by the 3DEXPERIENCE Platform



- PLM
- S&OP
- Support
- Service
- Consumer
- Market

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IDEATE

DEVELOP

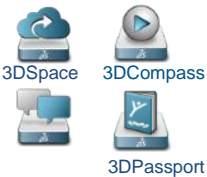
PRODUCE

LAUNCH

FIRST MARKET

ADAPT / REPLICATE

GLOBAL MARKETS



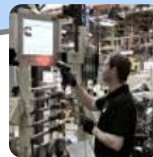
Perfect Lab



Perfect Product



Perfect Package



Perfect Production



Perfect Value Chain



Perfect Shelf

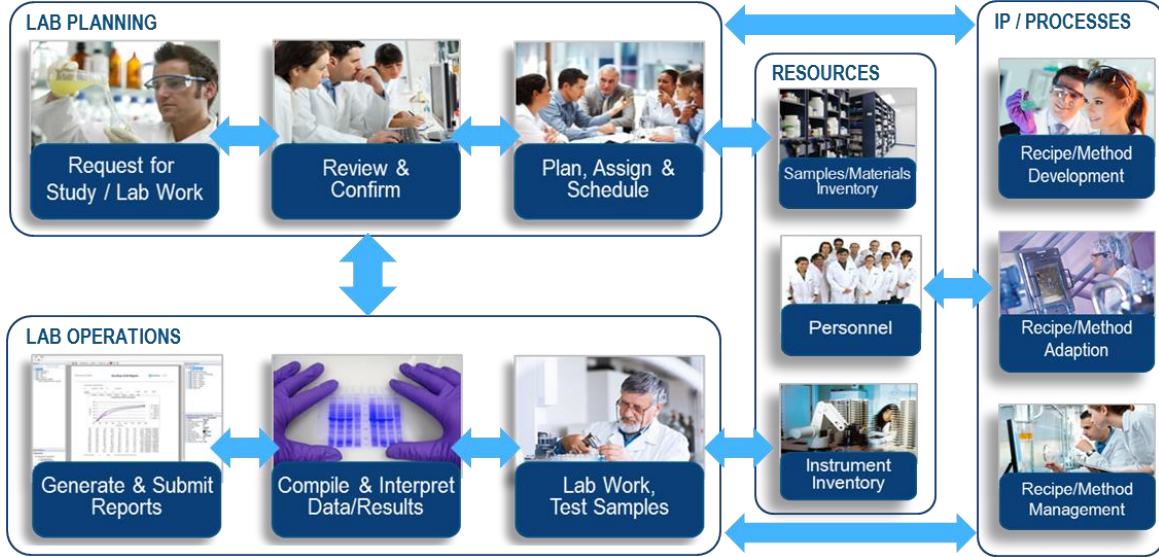


3DMessaging

Upstream Experience thinking

Design & Engineering

Simulation



- ▶ **20-40%** improvements in **productivity**
- ▶ **40-50%** reduction in lab **documentation time**
- ▶ **60-85%** of experimental data **reused**
- ▶ **25-30%** reduction in **raw materials used**

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Core Disciplines
New Disciplines

Perfect Product

Excellence in Formula Creation

Design & Engineering

Simulation

Manufacturing



- ▶ **Agility** : Quick reaction to evolving consumer demands
- ▶ **Time to develop reduced by 20%**
- ▶ **Sourcing costs reduced by 30%**
- ▶ **R&D productivity improvements**

Core Disciplines

New Disciplines

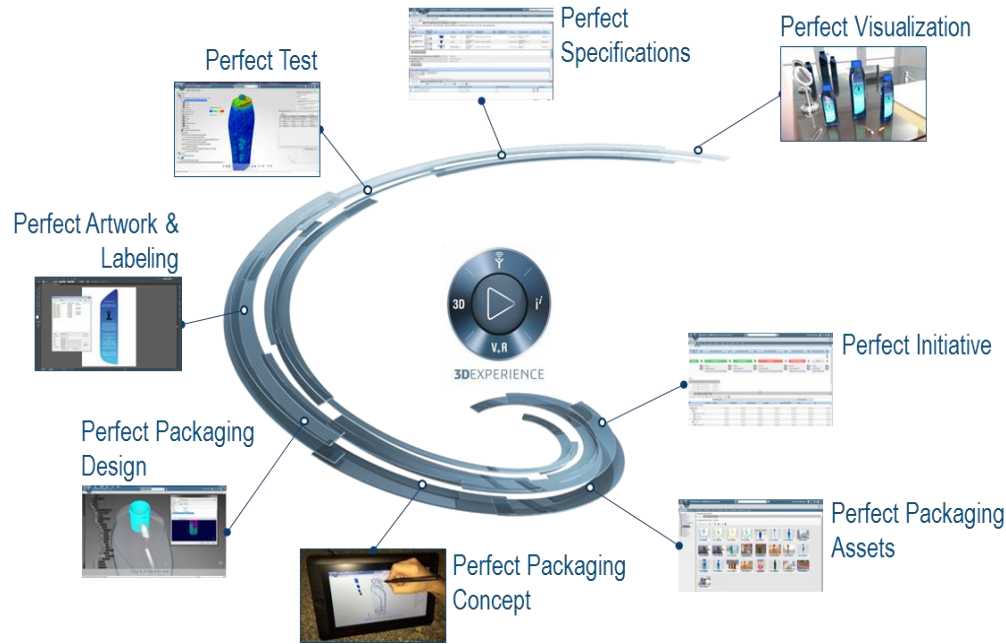
Perfect Package

Design Winning Experiences

Design & Engineering

Simulation

Manufacturing



- ▶ Improved **collaboration**
- ▶ Cut packaging **design time up to 50%**
- ▶ Reduce packaging material and design **costs between 30% to 50**
- ▶ Develop digital **intellectual property**
- ▶ Virtually **eliminate** packaging related **recalls**

Core Disciplines

New Disciplines

Perfect Production

A New Standard in Production Excellence

Manufacturing

Perfect Supply Network Intelligence



Perfect Manufacturing Operations



Perfect Containment



Perfect Supply Fulfillment



- ▶ Manufacturing execution **precision**
- ▶ Ensure **quality** consistency and consumer experience
- ▶ Improves **decision making** with **real-time visibility**
- ▶ **Standardizing** processes across sites
- ▶ Efficiency across **dynamic supply chains**

Core Disciplines

New Disciplines

Perfect Value Chain

Agile Value Chain Optimization

Manufacturing Consumers Journey Experience



- ▶ Improve efficiency at every stage of the supply chain journey
- ▶ Align all stake-holders on the plan
- ▶ Evaluate / choose a strategy
- ▶ Dynamically reconfigure value chain

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Core Disciplines
New Disciplines

Perfect Shelf

Win at Shelf

Consumers Journey
Experience

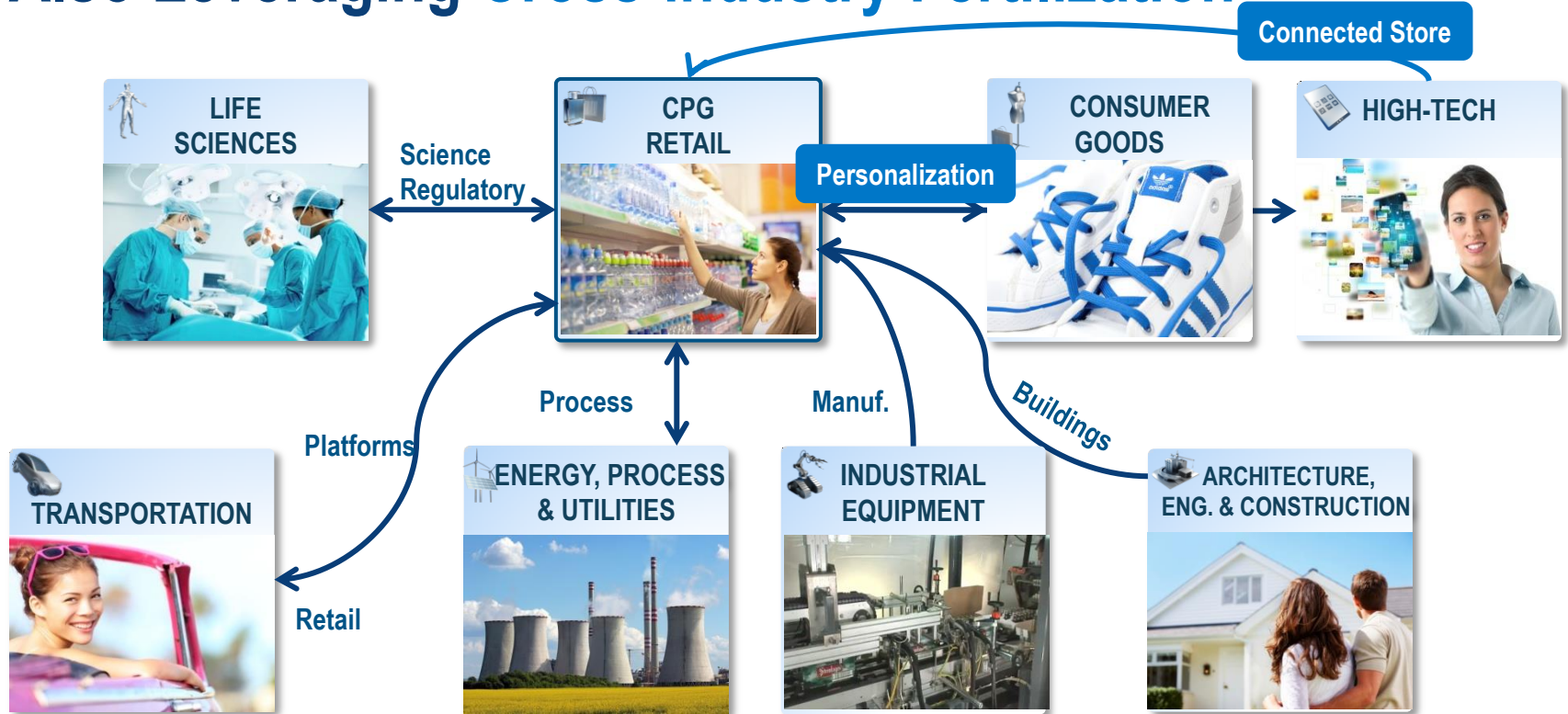


- ▶ Design better shopping experiences
improve sales +2-5% and margins up to +5%
- ▶ Improved **speed to shelf**
- ▶ Enhanced **manufacturer-retailer collaboration**
- ▶ Improved in-store **compliance**, execution and experience
- ▶ Lower Total **Cost** of Ownership
- ▶ Digital assets reuse : **omni-channel** visibility & range optimization

Core Disciplines

New Disciplines

Also Leveraging Cross-industry Fertilization



Virtual Shopping Experience



Innovation : Connected Store

Point of Sales – instant coffee category

real shelf

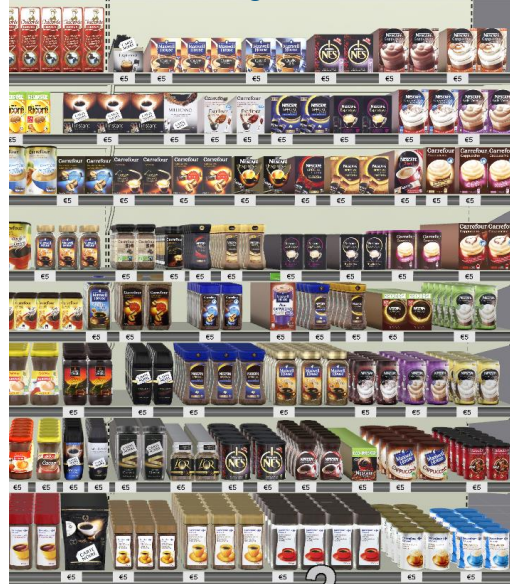


Electronic Shelf Labels

V+R

Store Digital Twin

real-time digital shelf



3DS
HIGH-TECH



Compliance (facings, assortments), Best Practices, Help Desks, OSA



Innovation : Connected Store



**Intermarché
Express**
in Issy les
Moulineaux

