



# CAPITAL MARKETS DAY 2020

**DS** DASSAULT  
SYSTEMES



**CAPITAL  
MARKETS  
DAY  
2020**



# Consumers' Perspective

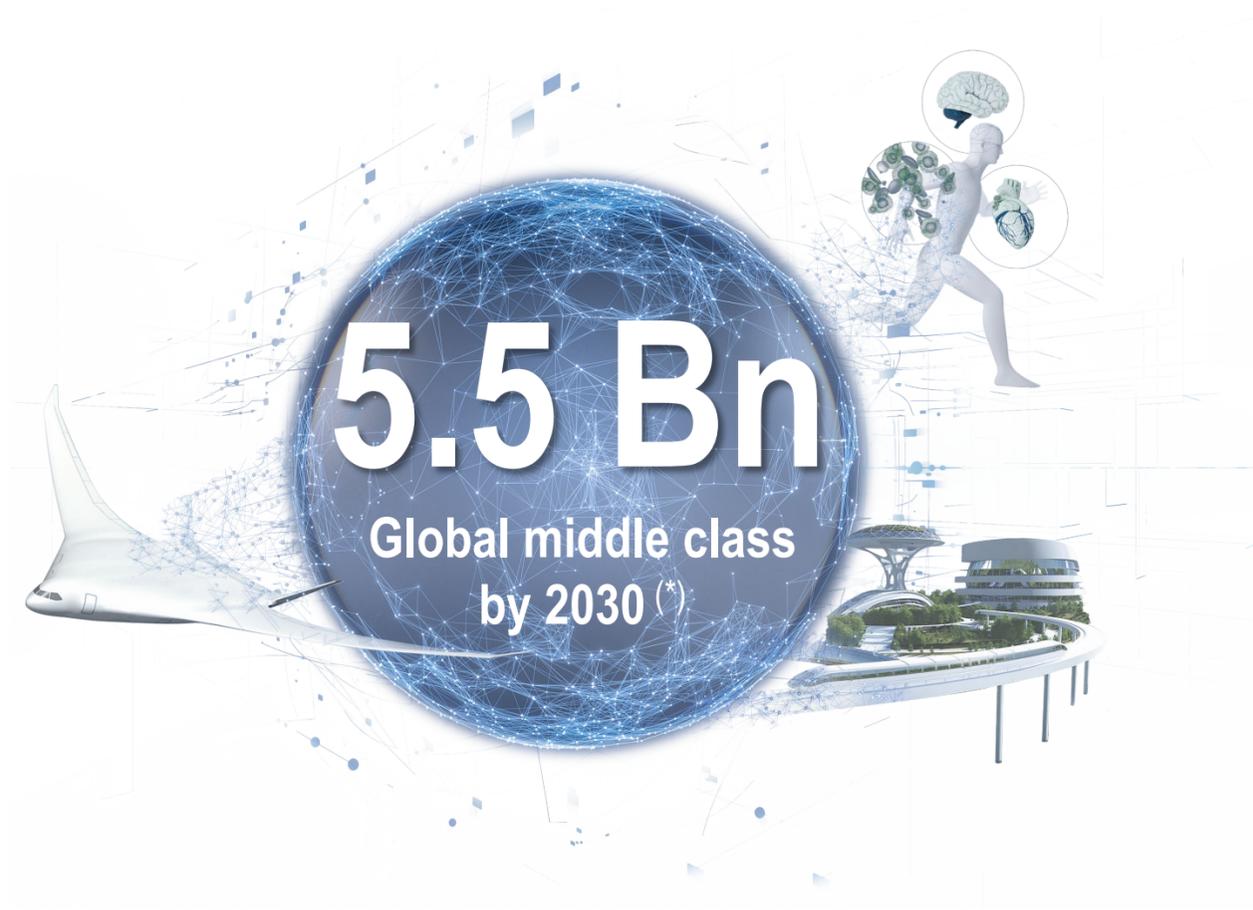
**Philippe Loeb**

**Dassault Systèmes**

**VP Home & Lifestyle, Consumer**

**Packaged Goods & Retail**

# “Power of the Numbers”



# All 11 industries

Furniture & Home Goods  
Sport & Leisure Goods  
Fashion & Luxury Goods  
Specialist Retailers



Food & Beverage  
Beauty & Personal care  
Household Products  
Packaging  
General Retailers

# 31 “Consumer segments” / 61

Consumer Electronics



Tire Manufacturers



Airlines  
Airframe OEMs



Yachts & Workboats  
Commercial Shipyards



Car & light truck OEMs  
Motorcycles  
T&M Industry Suppliers  
Truck & Buses  
Trains



Banking & Financial Markets  
Insurance  
Telecommunication  
Logistics Solutions  
Media & Entertainment



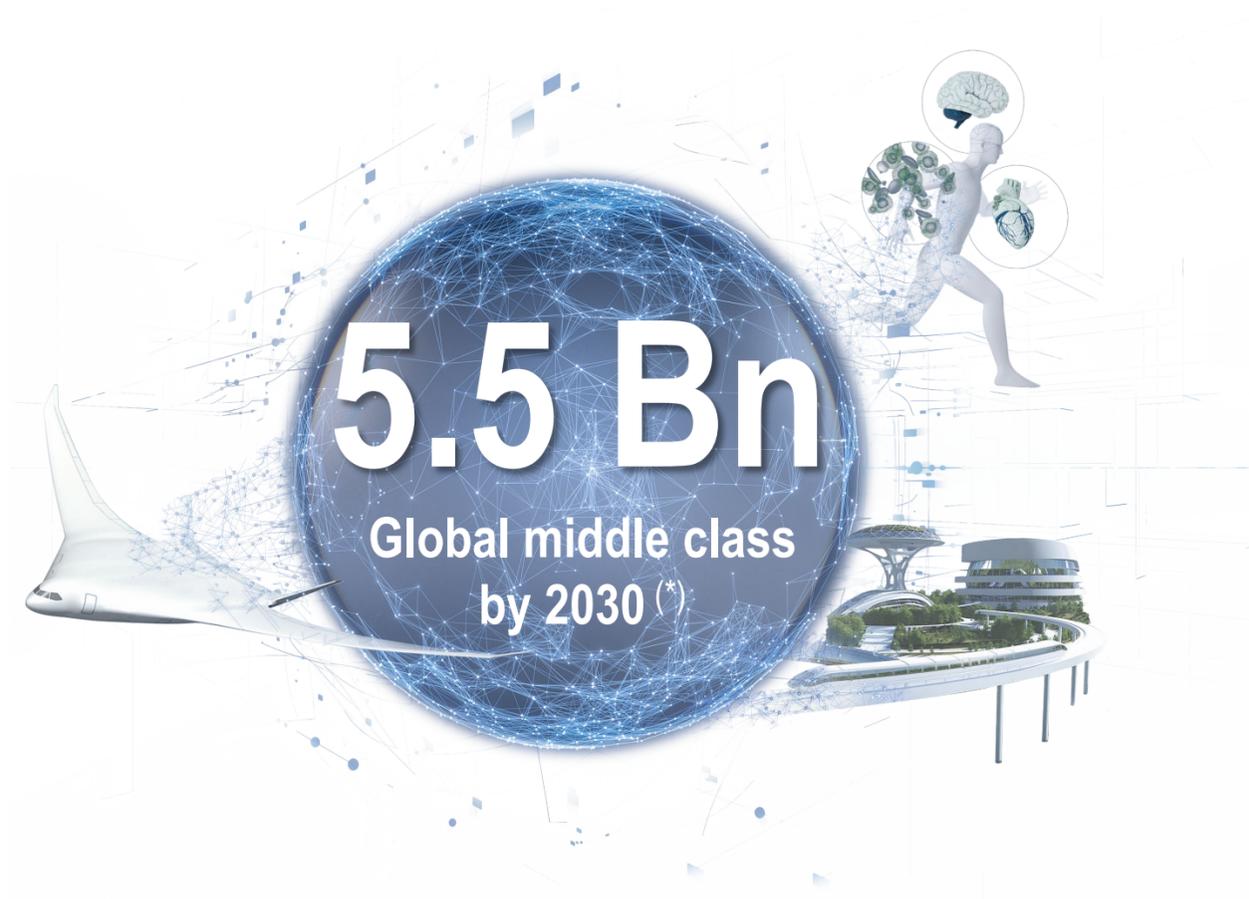
Pharmaceuticals & BioTechs  
Medical Devices & Equipment



Power



Building & Facilities  
Construction Products & Services



# Middle Class Spending: From \$37 trillion in 2017 to \$64 trillion by 2030

1/3<sup>rd</sup> of the GDP growth(\*)  
to be captured by our  
customers' brands

Furniture & Home Goods  
Sport & Leisure Goods  
Fashion & Luxury Goods  
Specialist Retailers



Food & Beverage  
Beauty & Personal care  
Household Products  
Packaging  
General Retailers

PANDORA L'ORÉAL

Consumer Electronics



Pharmaceuticals & BioTechs  
Medical Devices & Equipment

Tire Manufacturers



TOYO TIRES

5.5 Bn  
Global middle class  
by 2030 (\*)



Power

Airlines  
Airframe OEMs



Southwest



Building & Facilities  
Construction Products & Services

Yachts & Workboats  
Commercial Shipyards



RoyalCaribbean INTERNATIONAL



Banking & Financial Markets  
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# Our Strategy : Consumer Centricity

## SUSTAINABLE LIFESTYLES

- ▶ **Ethical consumption**  
maximize reuse, less impulsive buying, local preference

- ▶ **Health & wellness**  
self care, home produced / prepared food, right ingredients and quantities, less animal protein

- ▶ **Value Buying**  
Essential needs, less spending power, less impulse buying

## CONNECTED COMMERCE

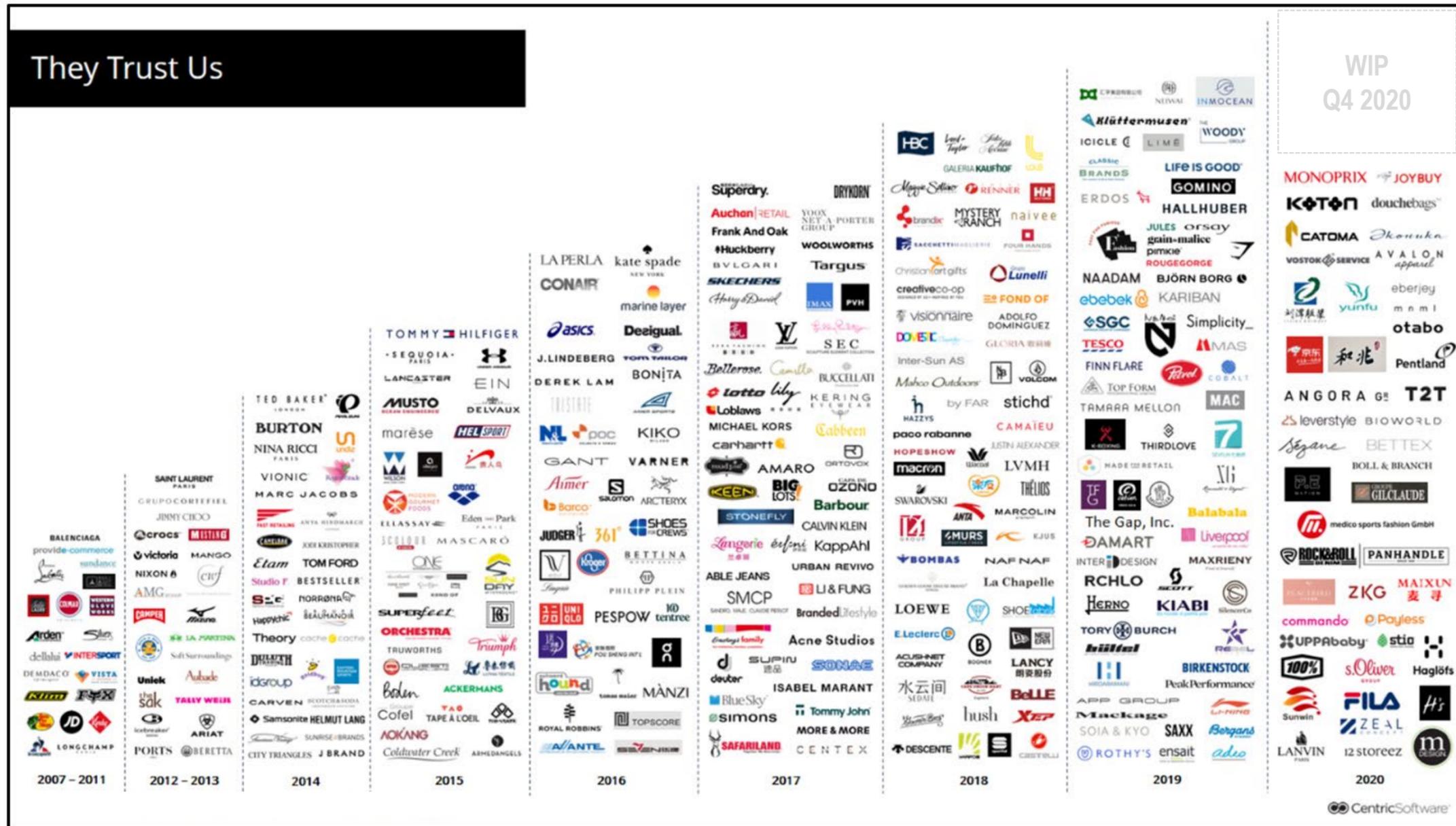
- ▶ **“No store, always On” retail**  
remotely experience before you buy, 360° information, constant interaction
- ▶ **More retail options**  
buy directly from brands, local producers, other consumers
- ▶ **Seamless Delivery**  
On time, flexible, guaranteed, conscious

## SAFER AT HOME

- ▶ **Safe home :**  
clean surfaces, clean air, ageing populations
- ▶ **Multi purpose homes:**  
life, work, learn, self care, food production, energy production
- ▶ **Assisted home :**  
smarter, automated, contextual
- ▶ **Personalized home:**  
our home, my place, my goods, my life



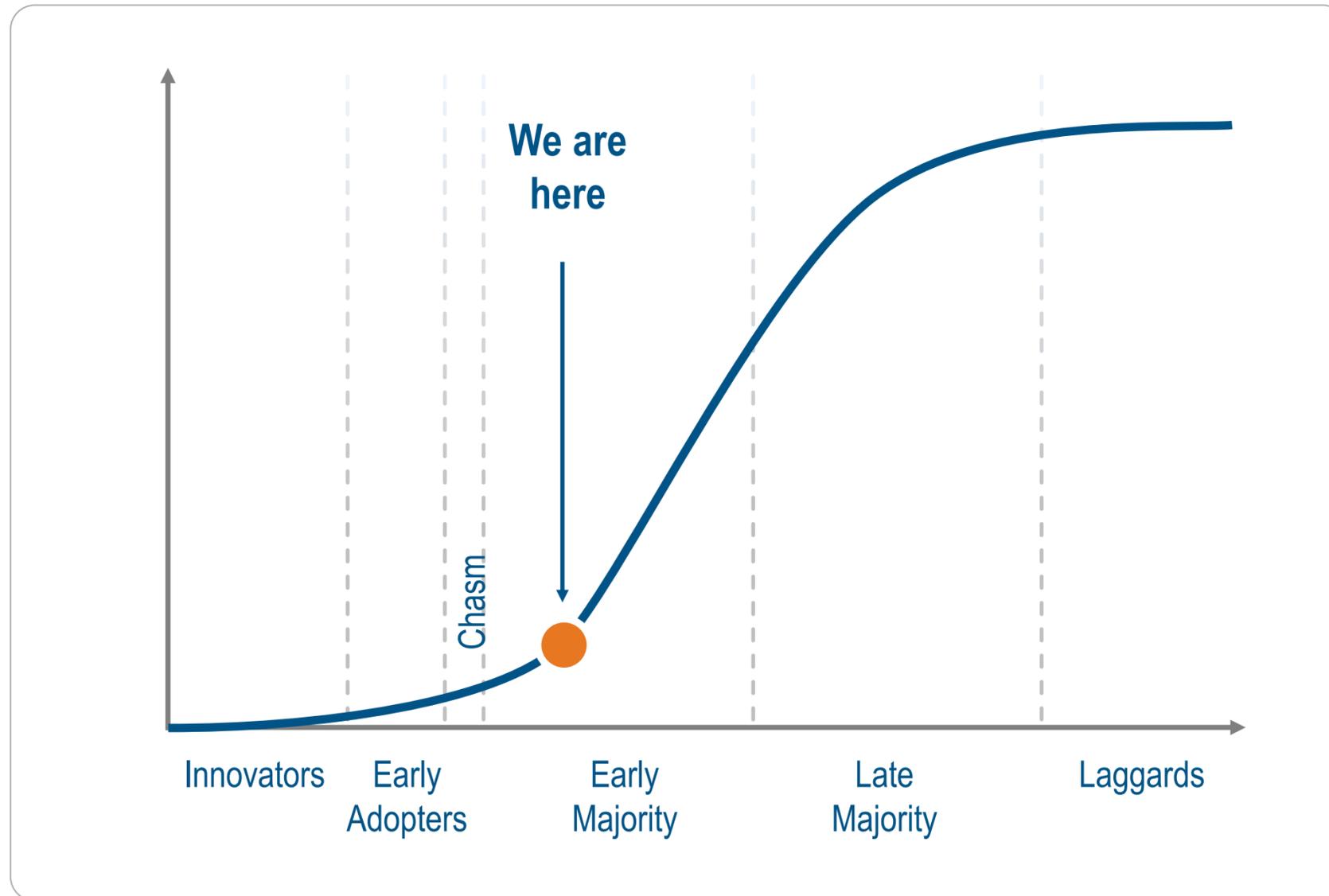
# Centric PLM is helping 400+ Brands Getting Closer to Consumers



## ► Footprint increase continues !

- ▷ Cloud Offers and first 100% remote deployments
- ▷ ‘Market Awareness’: Agility in developing brand collections from anywhere is a major competitive advantage
- ▷ Sustainable Fashion requires precise DATA to understand and reduce footprint

# Centric PLM: start of **Mainstream Adoption** in a **Very Large Market**



**A global market of 64k brands**

25k in Europe

15k in North America

21k in Asia



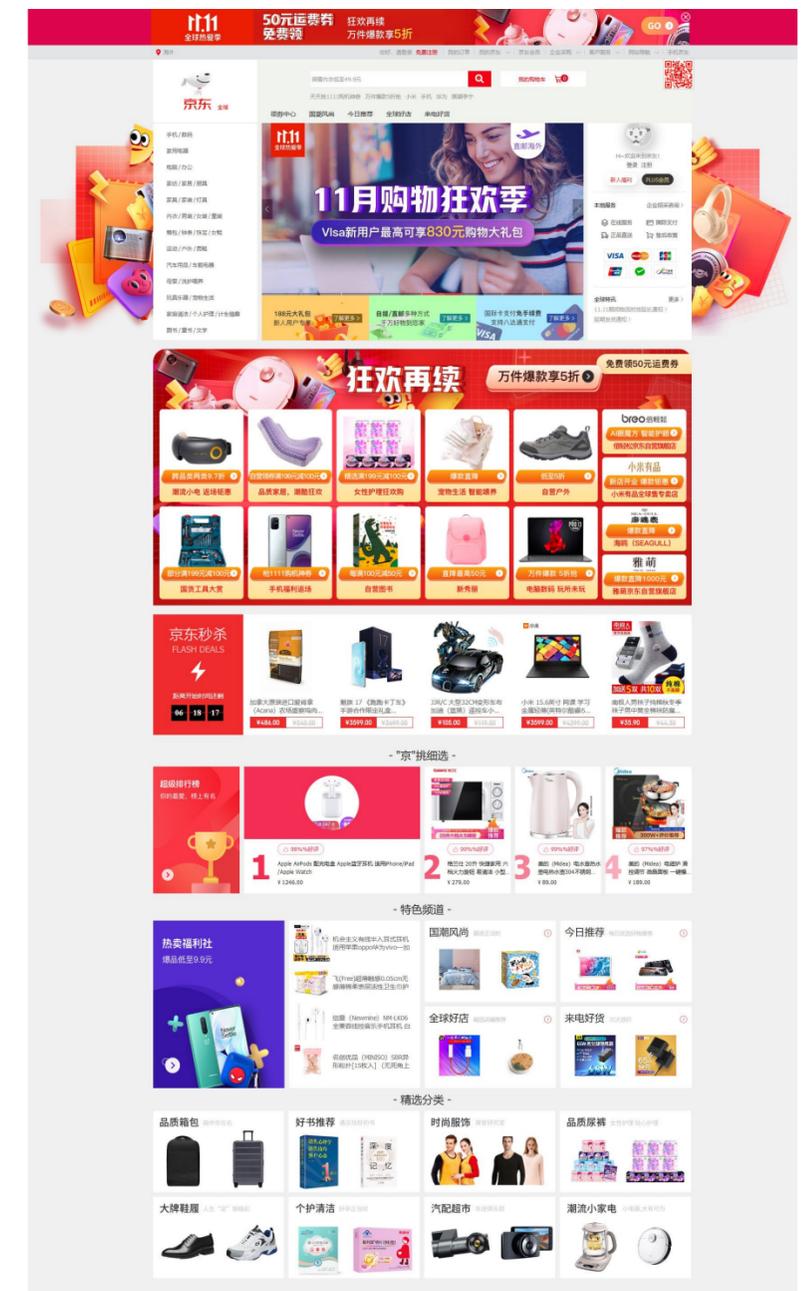
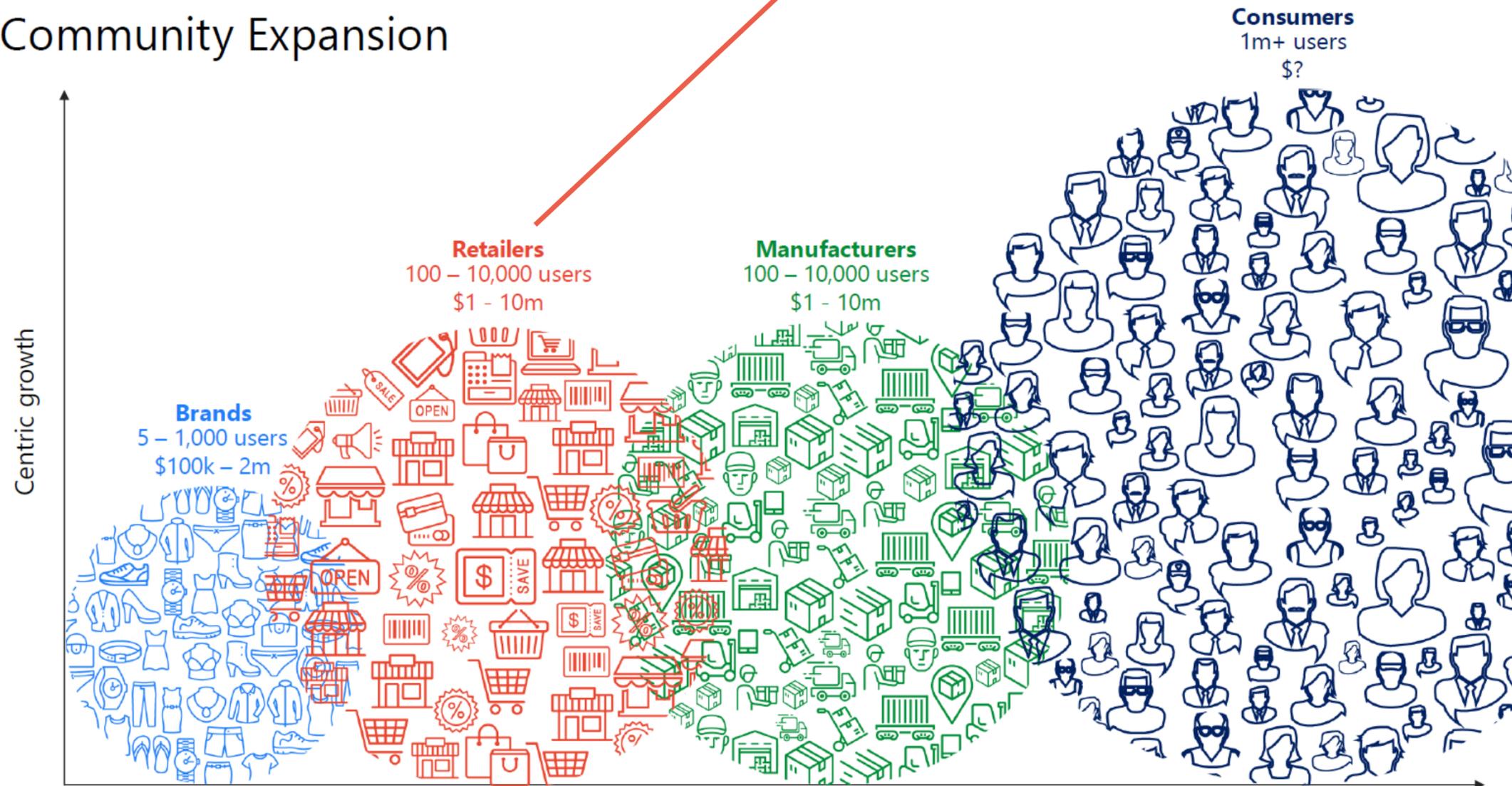
# ... Now Expanding Into Retail,



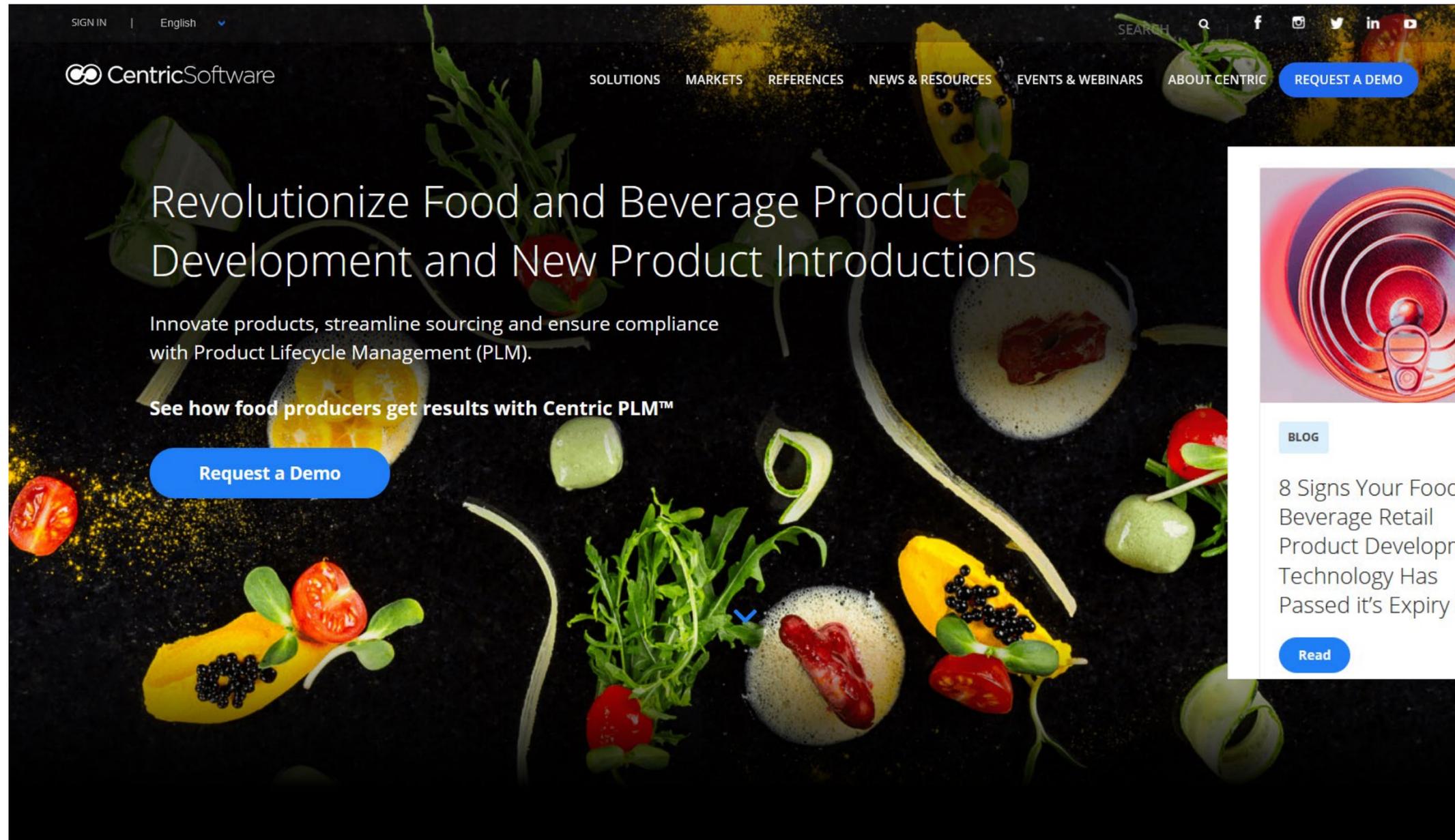
Adopts  
Centric PLM

Founded by [Liu Qiangdong](#) on June 18, 1998, [JD.com](#) is China's #1 and world's #20 largest retailer, with \$79 billion net revenue in 2019

## Community Expansion



# .... And Entering Food Retail



SIGN IN | English

SEARCH

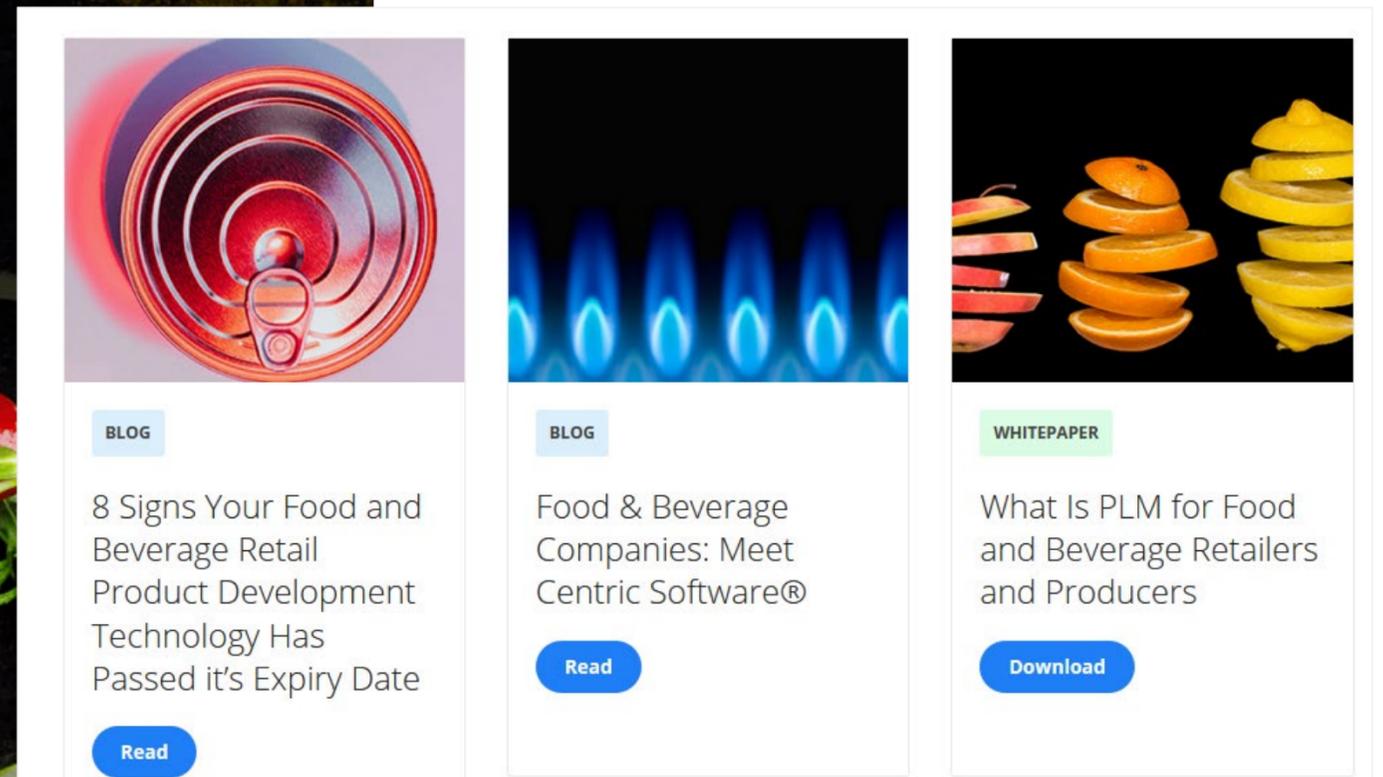
SOLUTIONS MARKETS REFERENCES NEWS & RESOURCES EVENTS & WEBINARS ABOUT CENTRIC REQUEST A DEMO

## Revolutionize Food and Beverage Product Development and New Product Introductions

Innovate products, streamline sourcing and ensure compliance with Product Lifecycle Management (PLM).

See how food producers get results with Centric PLM™

Request a Demo



**BLOG**

8 Signs Your Food and Beverage Retail Product Development Technology Has Passed its Expiry Date

Read

**BLOG**

Food & Beverage Companies: Meet Centric Software®

Read

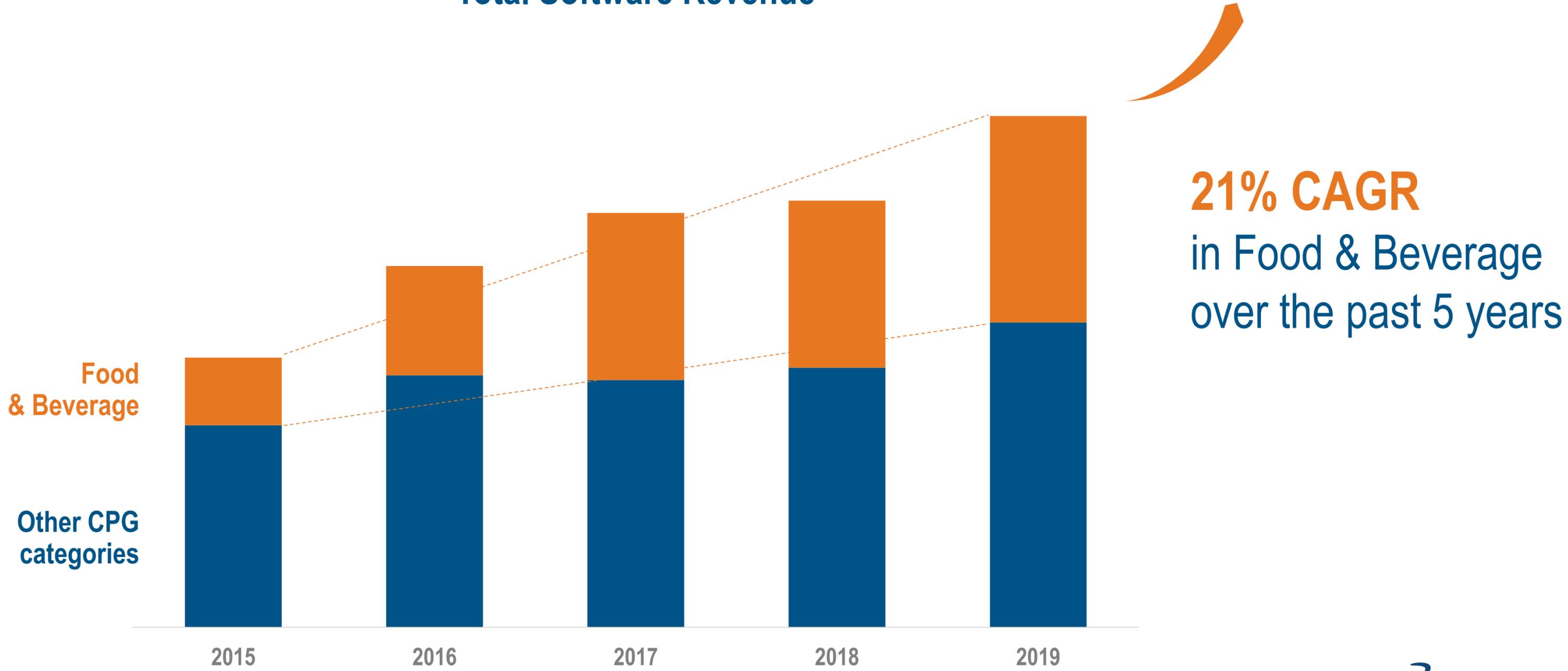
**WHITEPAPER**

What Is PLM for Food and Beverage Retailers and Producers

Download

# DS Solutions are also Growing Very Fast in Food & Beverage...

Total Software Revenue

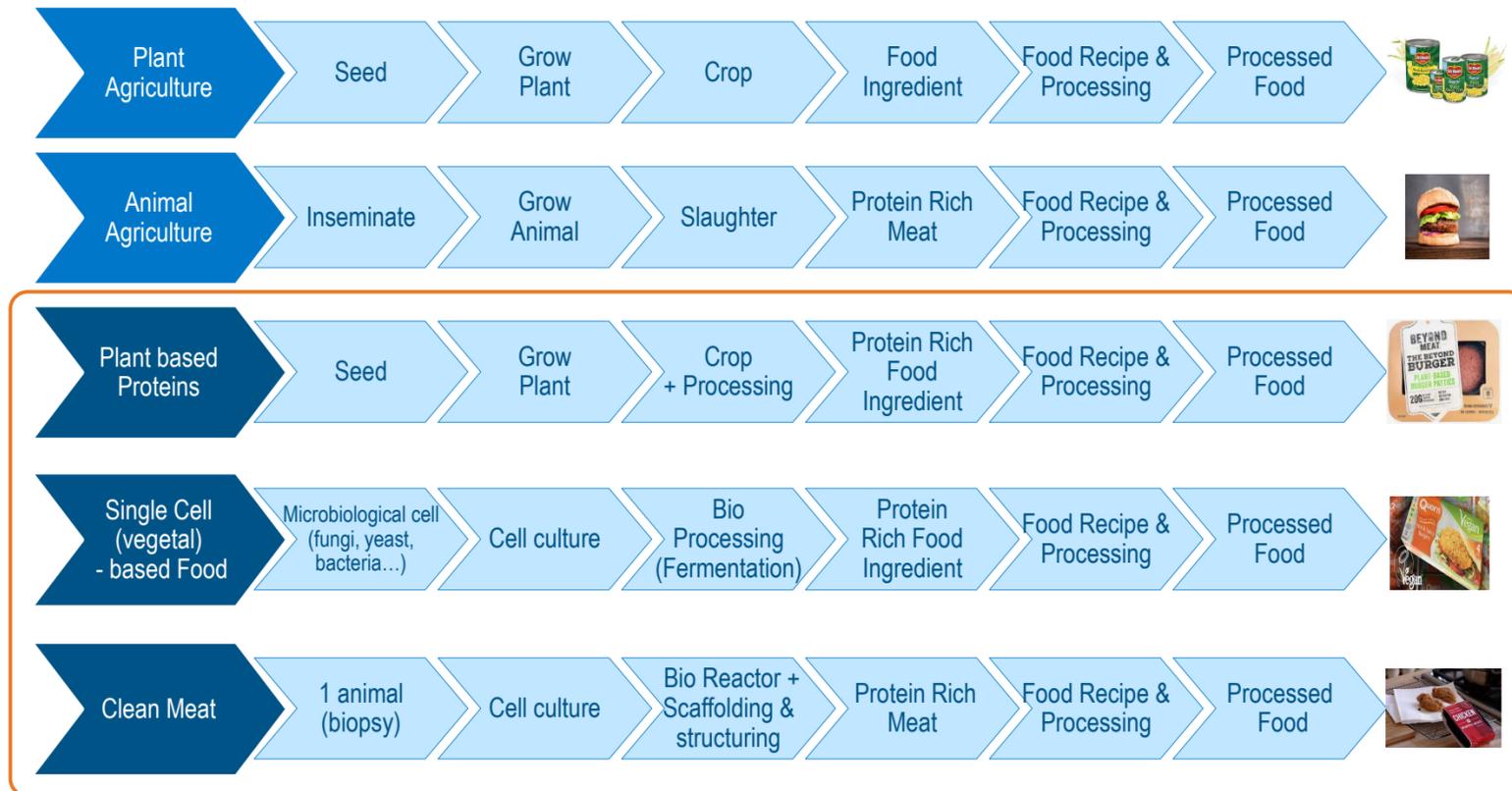


# Why? F&B Demands More Science and More Precision

## 1. Food Science / Food Tech

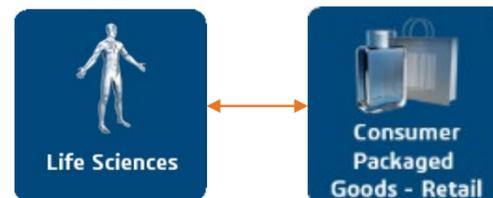
Business Driver: the New Consumer

**Forbes**  
 Oct 29, 2018, 09:56pm EDT  
**Global Food Tech Industry  
 Expected To Reach \$250  
 Billion By 2022**



Eg. The Race for Proteins

Differentiator



## 2. Food Supply Network & Operations

Business Drivers: Margin pressure + the New Consumer (Demand)



Differentiator



### PLATFORM OPTIMIZATION

- ✓ Reduce sourcing costs
- ✓ Reduce production costs
- ✓ Reduce transportation costs
- ✓ Protect service levels
- ✓ AGILE RECONFIGURATION

# “Home as a Platform”: Consumer Centric Value Chains



Business Driver :  
**the New Consumer**  
 ‘safer at Home’  
 resulting in an **accelerated growth of Home Improvement categories / Retail**

**Differentiators:**

- ▶ **HomeByMe**  
C2B Experiences
- ▶ **DS installed base** in multiple segments / industries
- ▶ **3DEXPERIENCE Communities, Content & Marketplace management**

e.g. Kitchen Value Chain

# “One more thing” : Connected Commerce

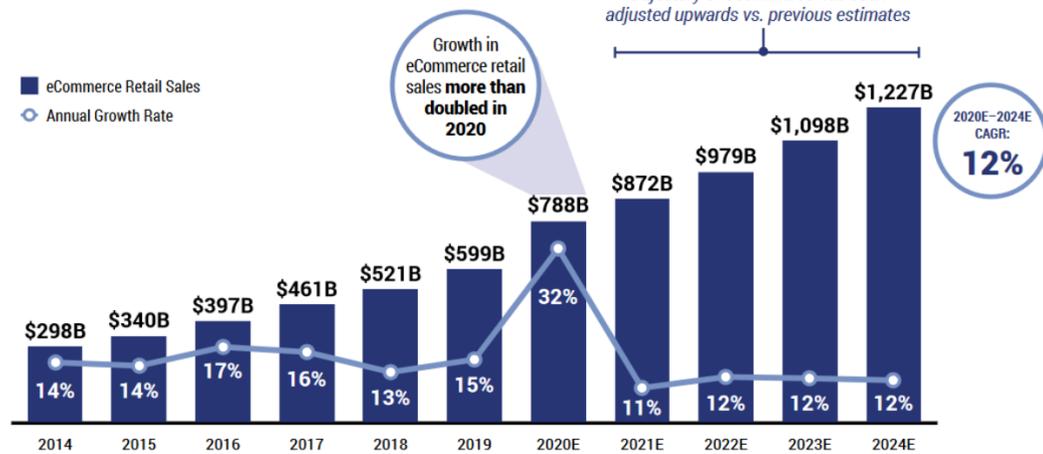
Tomorrow:  
**EXPERIENCE** Platforms

## ‘Accelerating Five Years in Five Month’

TOTAL ECOMMERCE RETAIL SALES AND ANNUAL GROWTH<sup>1</sup>, U.S., 2014-2024E, BILLIONS USD / % ANNUAL GROWTH



■ eCommerce Retail Sales  
○ Annual Growth Rate

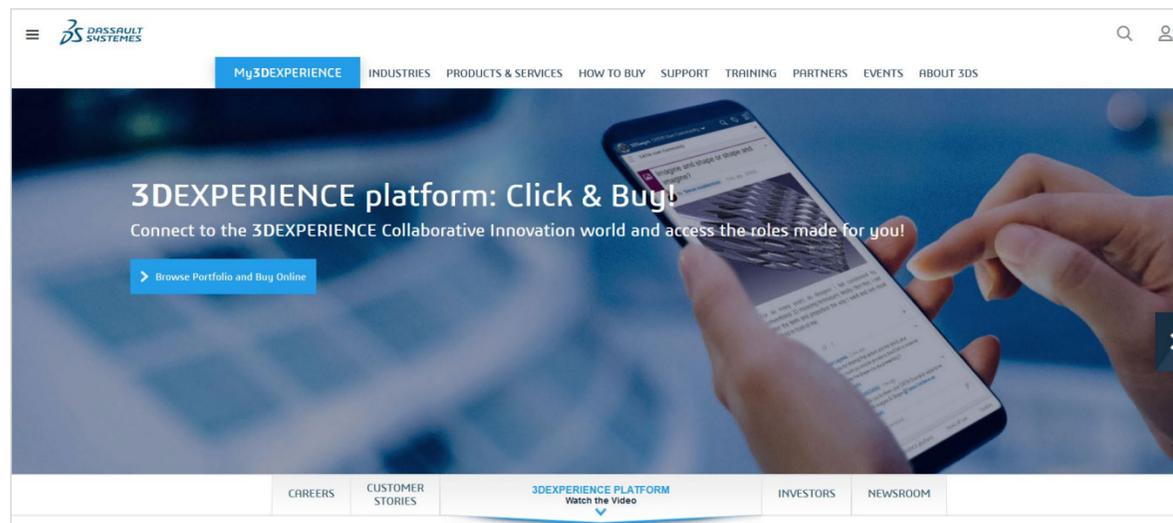


While future annual growth is not expected to reach 2020 levels, the overall trajectory of eCommerce has been adjusted upwards vs. previous estimates

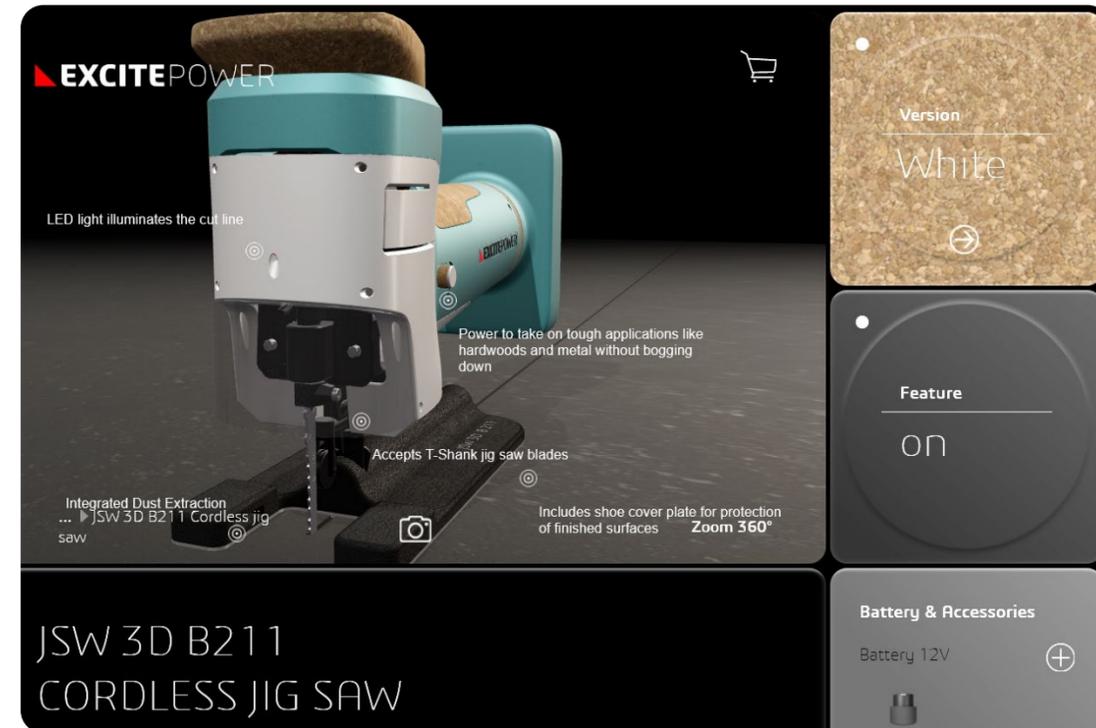
Growth in eCommerce retail sales more than doubled in 2020



1. Excludes travel and tickets and other services (e.g. food service and gambling).  
Sources: Activate analysis, eMarketer, Forrester, National Retail Federation, Research and Markets, U.S. Census Bureau, U.S. Department of Commerce



## E-commerce Platforms



Differentiators: 3D Content repurposing,  
3DEXCITE knowledge & know-how

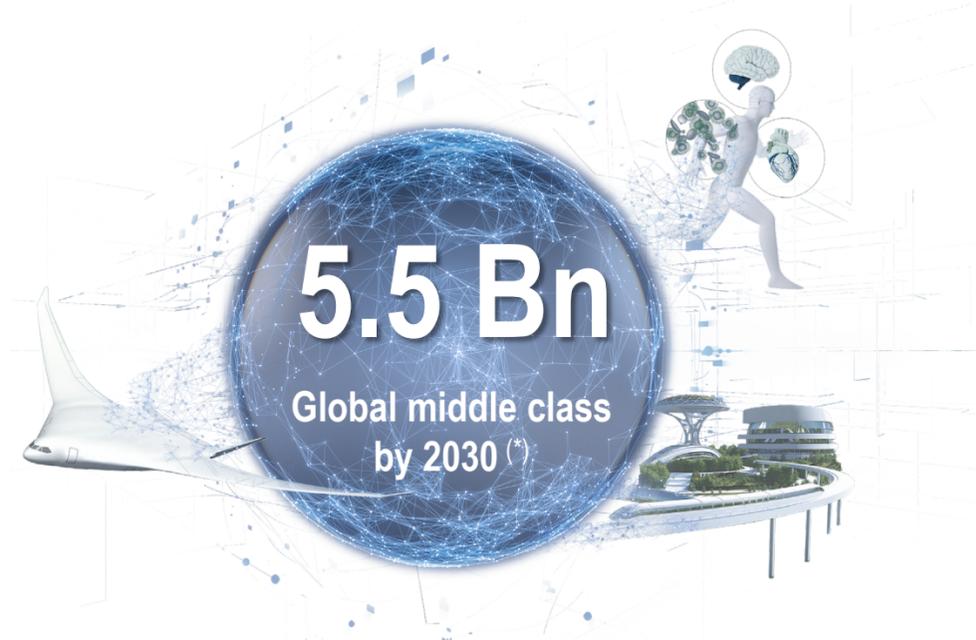
DS Existing  
Customers  
and Users



New Users :  
capturing sales &  
marketing budgets



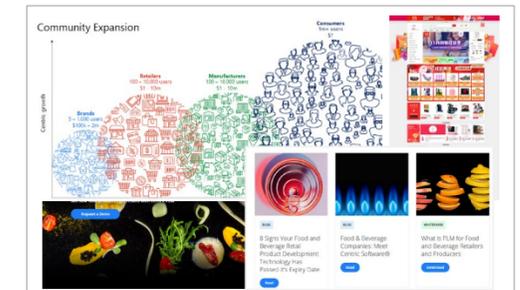
# Consumers' Perspective: In Summary



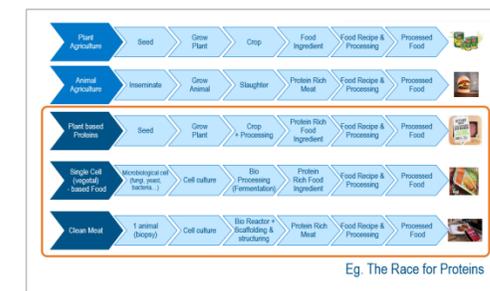
- ▶ Huge Opportunity
- ▶ All industries



- ▶ Centric PLM Mainstream Adoption & Expansion into Retail



- ▶ Science & Precision in Food, Beverage & Beauty with 3DEXPERIENCE



- ▶ Home as a platform, 'Experience Commerce' via By.Me + 3DEXPERIENCE



