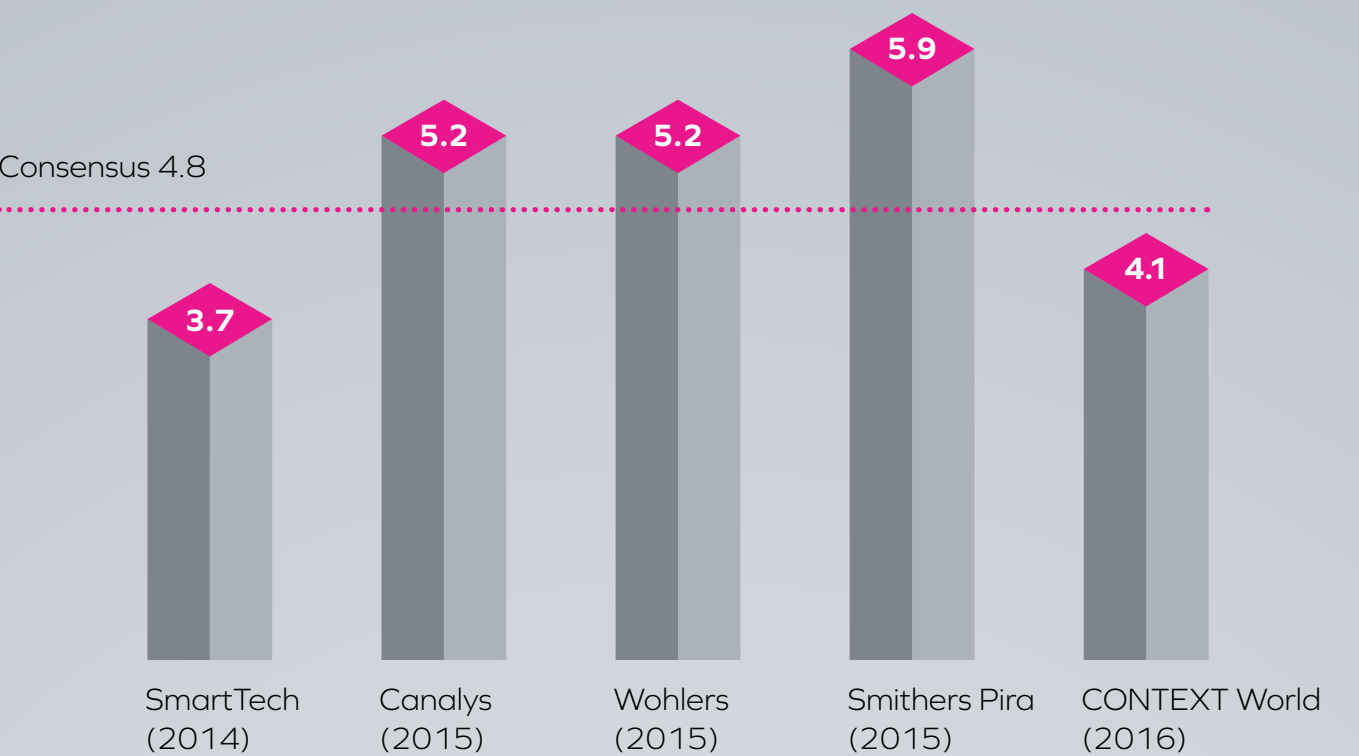


3D Printing Market OUTLOOK

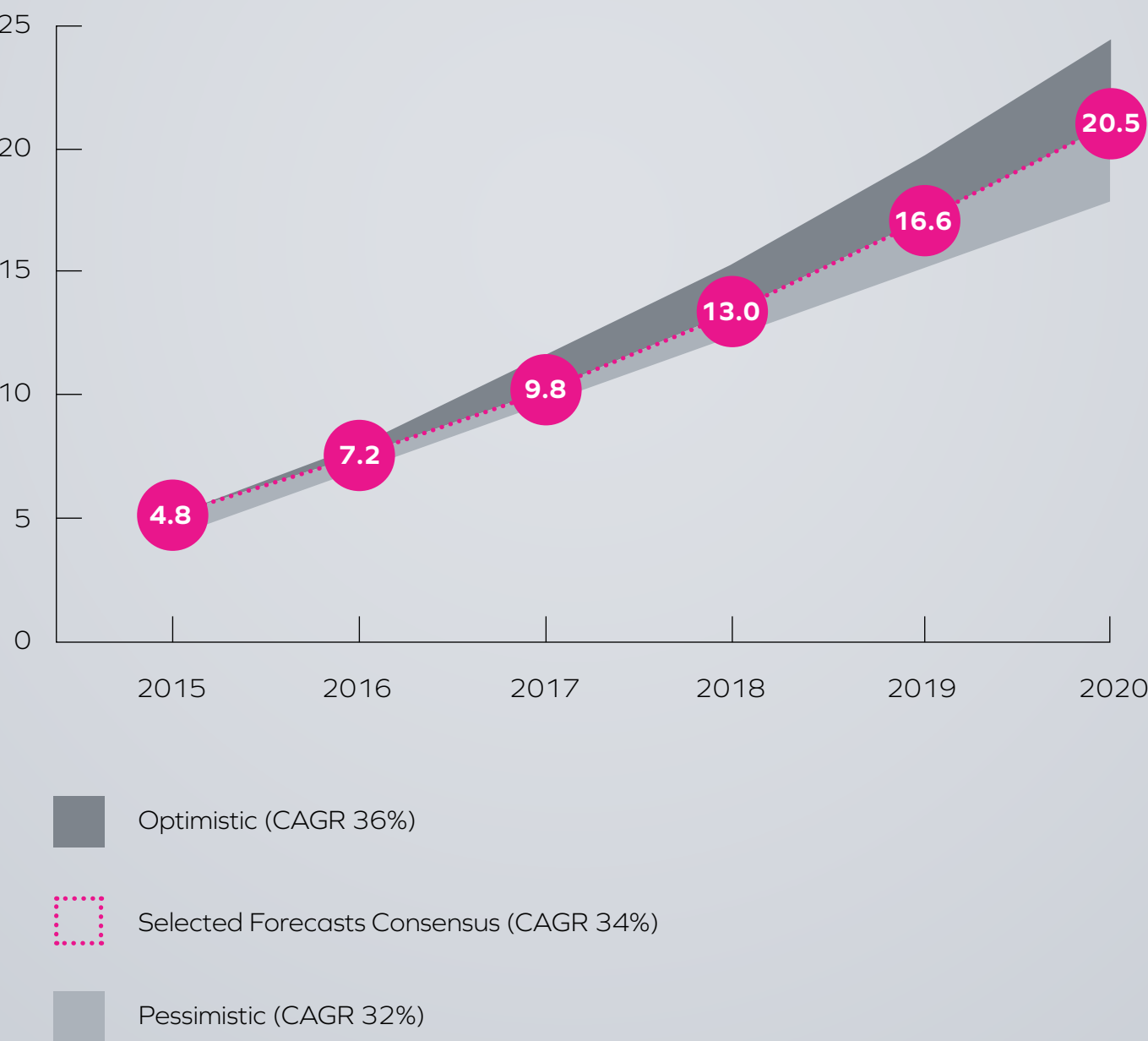
1 HOW BIG is the market?

Market value estimates (hardware, materials, services) 2015, in billions USD
Source: Deloitte analysis based on the respective sources



2 ESTIMATED GROWTH of the market 2015 - 2020

Estimated growth of the AM market 2015-2020, in billions USD
Source: Deloitte analysis based on selected forecasts (Wohlers, Context, Canalys)



3 TECHNOLOGY overview

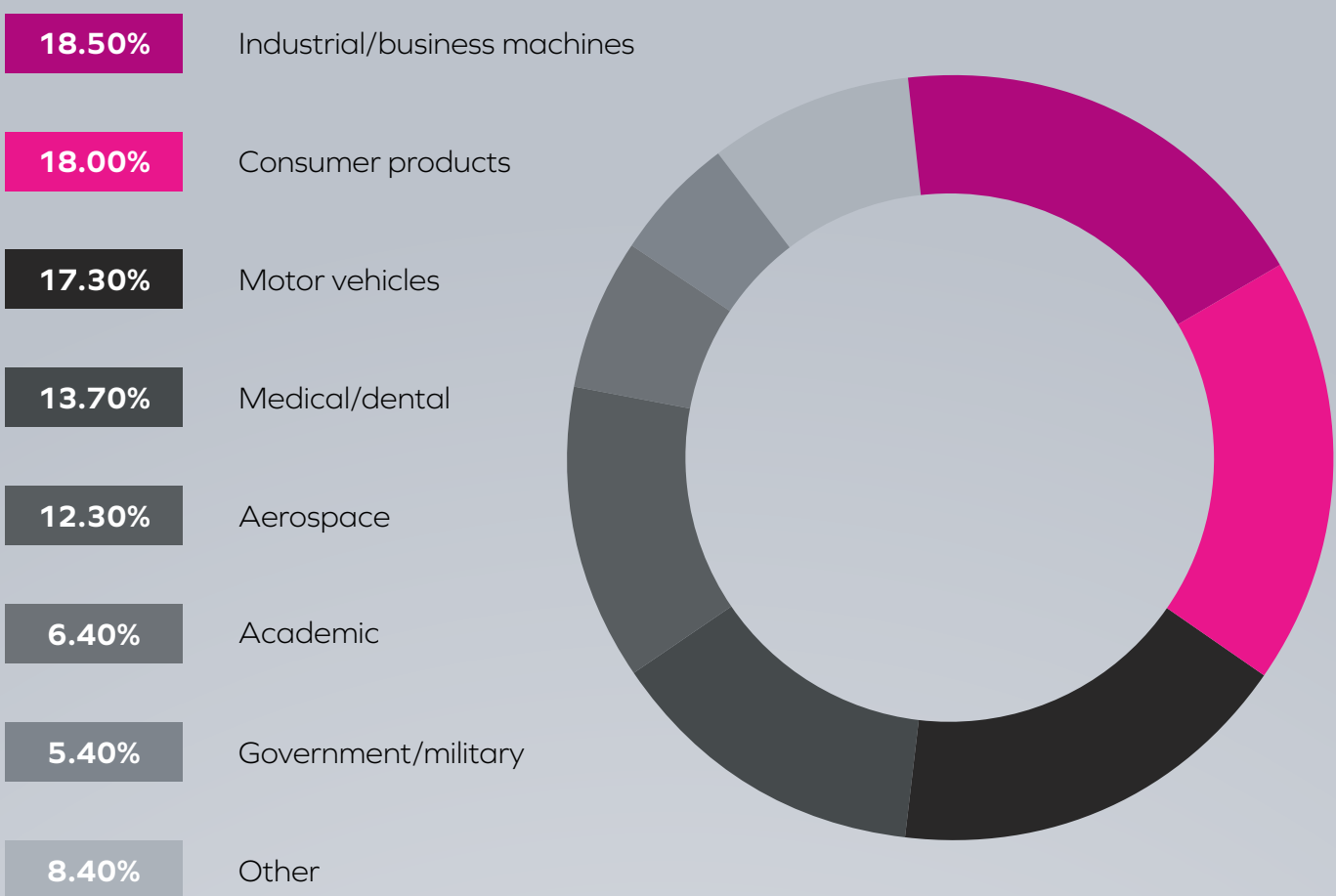
Technologies comparison	Material	Precision	Speed	Ease of use	Durability	Costeffectiveness
Material Extrusion (FFF)	Thermoplastics only					
Stereolithography (SLA)	Resins only					
Selective Laser Sintering (SLS)	Plastic/Metal/Other					
Material Jetting (PJ/MJ)	Resins only					

Legend: High Low score

4 WHO USES Additive Manufacturing?

Industries using additive manufacturing

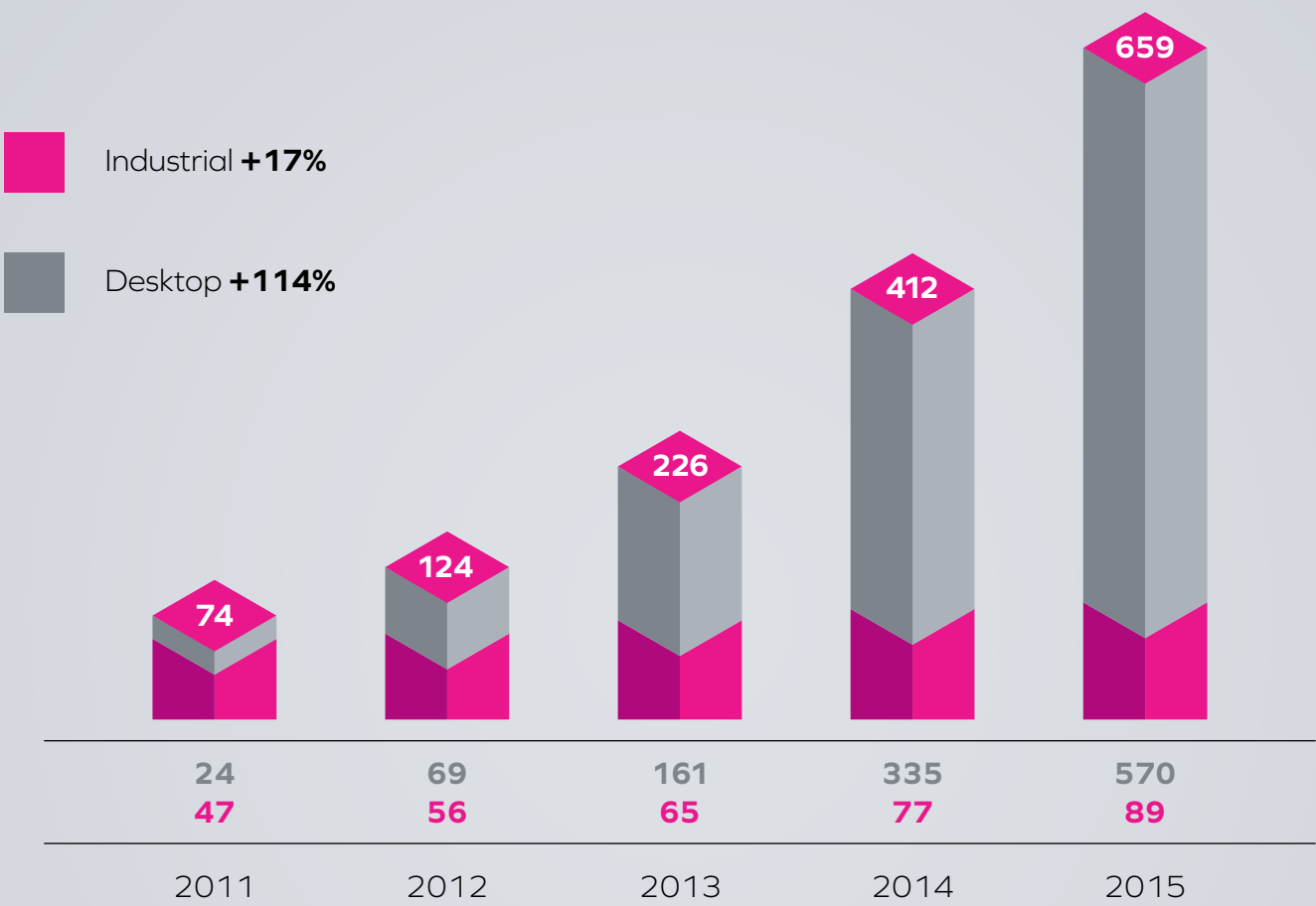
Source: MIT Technology Review based on Wohlers Associates



5 INDUSTRIAL vs. DESKTOP 3D printers

The installed base of 3D printers 2011-2015, in thousands of units

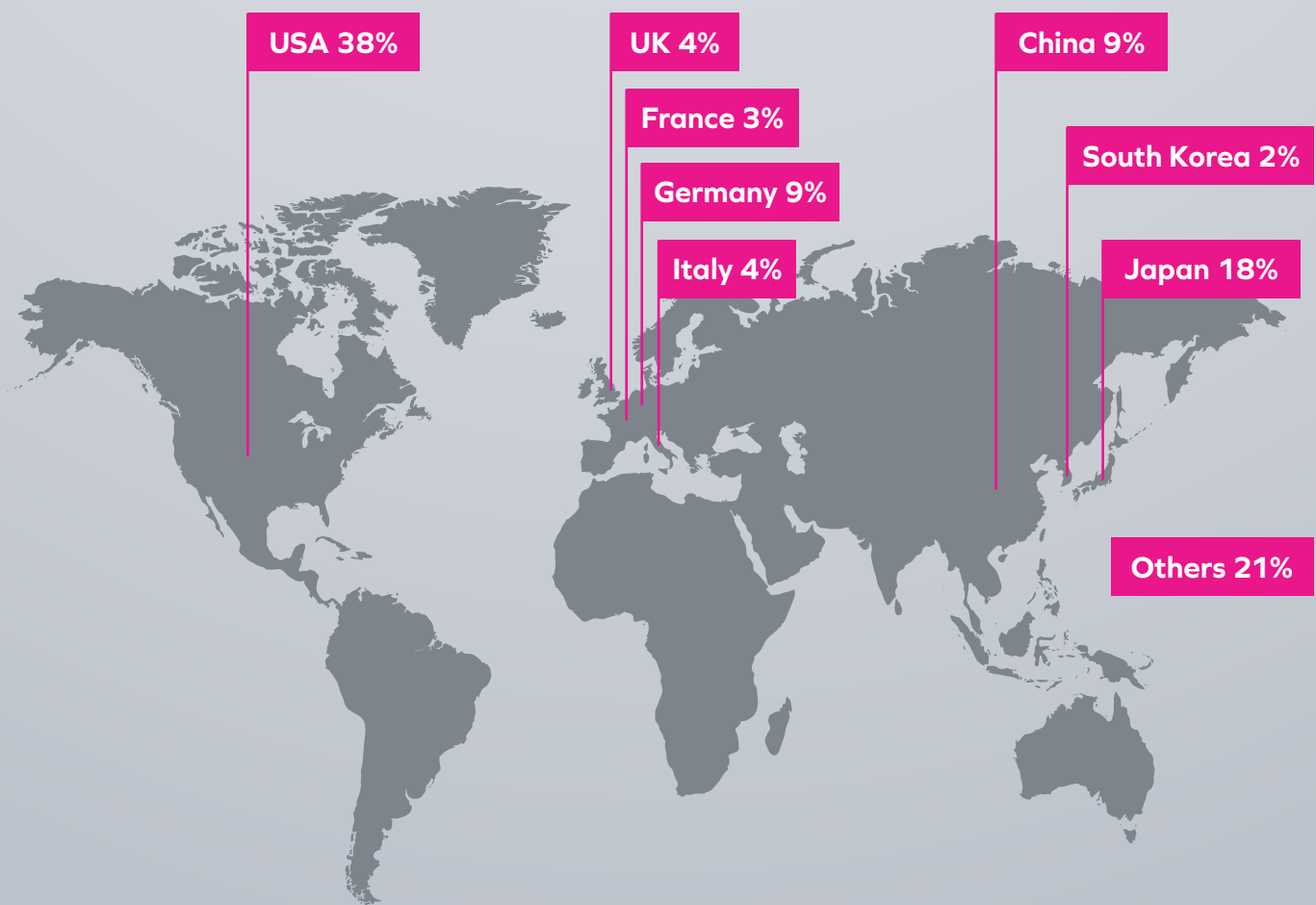
Source: Deloitte based on various CONTEXT World's publications



6 WHERE is AM used?

Cumulative industrial AM systems installed by country as of 2012 in %

Source: Wohlers Associates



AM — Additive Manufacturing, a synonym of AM, indicative of various processes used to synthesize a three-dimensional object.

WITH MORE COMPANIES exploring new and exciting ways to utilize the technology, we are sure to see success stories surrounding the use of 3D printers spread. **THE HIGH QUALITY** offered by desktop printers, combined with their affordability, is opening new opportunities for business owners.



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