

Hannover Messe

CLUSTERS IN THE EU AND THE USA:
OPPORTUNITIES FOR COLLABORATION
AND GROWTH

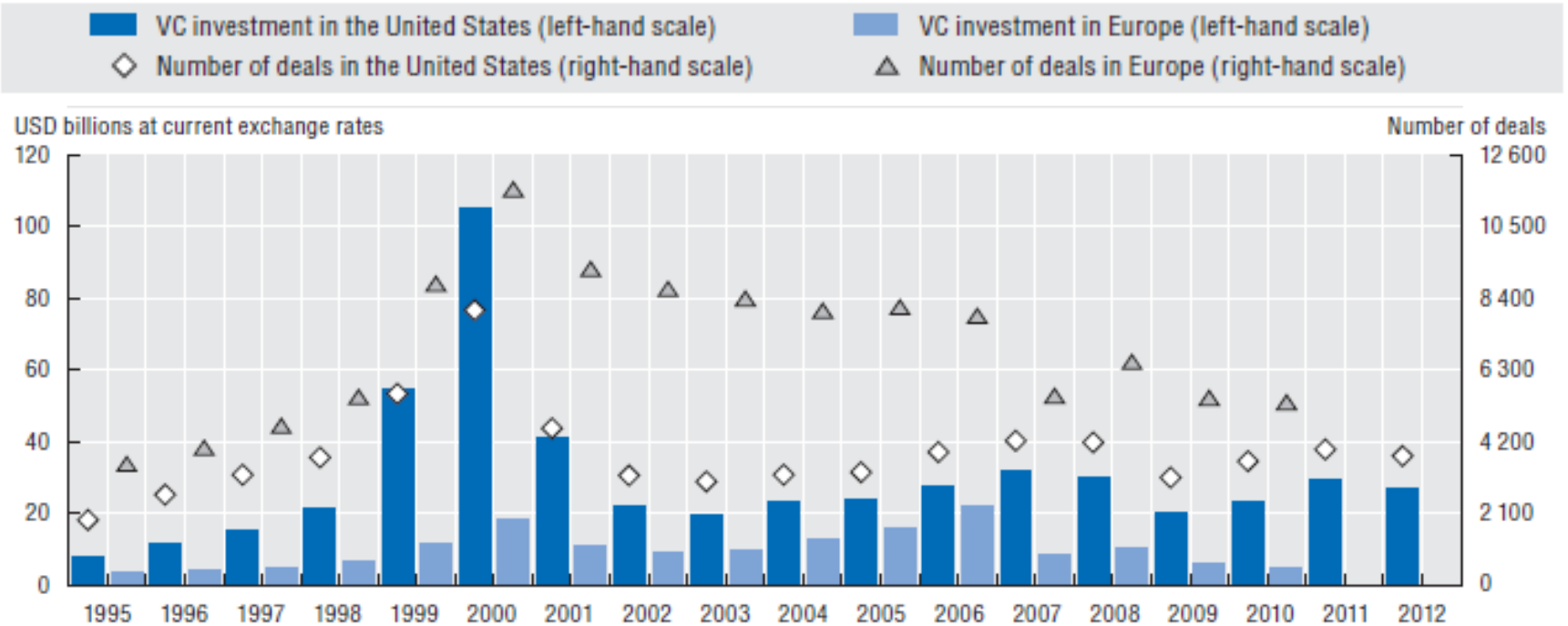
April 25, 2016



MANUFACTURING*THE***FUTURE™**

WWW.3DSYSTEMS.COM | NYSE: DDD

Venture capital investment in the United States, 1995-2012 and in Europe, 1995-2010



Source: OECD calculations based on PwCMoneyTree, EVCA/Thomson Reuters/PwC and EVCA/PEREP_Analytics, June 2013.

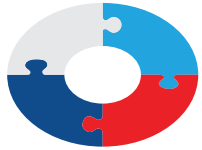


America Makes Overview

A Unique American take on *Fraunhofer*



The foundation is laid – March 2012, the formation of a National Network for Manufacturing Innovation (NNMI) proposed; America Makes (National Additive Manufacturing Innovation Institute) launched in August the initial institute.



The vision is simple – leverage our nation's brilliant technical minds in all corners of government, industry and academia to accelerate the adoption of additive manufacturing / 3D Printing technologies in the U.S. manufacturing sector and increase domestic manufacturing competitiveness.



The goal is bold – create truly collaborative environments to bring technology advancements from the lab to the factory floor, create jobs, produce more competitive products, and ultimately reaffirm our place in the global market.



The institute is strong – Operated by the National Center for Defense Manufacturing and Machining, America Makes is a public / private partnership located in Youngtown, Ohio with over 170 members.



America Makes Regional Impact

Strong Regional Focus – Technology Belt
Region of Ohio, Pennsylvania, and West Virginia
currently has 56 members

Regional Cluster Development – Northwest
Ohio and Western Pennsylvania value chain clusters
are being formed and aligned to leverage America
Makes Roadmap and Investment Strategy

Workforce and Education – Multiyear Additive
Manufacturing apprenticeship program underway with
West Virginia, scales nationally



National Footprint, Regionally Clustered
Currently 171 Members



Tapping a European Cluster (Sample of Spin-Off Companies)



LayerWise

[LayerWise](#) founded as a KU Leuven spin-off company in 2008 and is one of the top players in metal Additive Manufacturing. After gaining recognition across industrial sectors, AM is increasingly being adopted in different medical fields such as dentistry, orthopaedics, maxillofacial and spinal surgery. In 2014, LayerWise was acquired by [3D Systems](#).



[Materialise](#) was set up as a KU Leuven spin-off company in 1990 and grown into an international Additive Manufacturing player with over 1,000 employees. It has the largest AM capacity in Europe and is a market leader for 3D printing and Digital CAD software. Materialise is also a major player in medical and dental image processing and surgery simulation. Materialise is adding value in the field of orthopaedic and maxillofacial implants.



Metris provides total solutions for 3D digitising, 3D inspection, reverse engineering targeting the design and manufacturing community. Primarily focusing on the automotive and aerospace industry, Metris is also active in consumer, medical, entertainment and various other industries. In 2009 Metris was acquired by [Nikon Metrology](#).

