

Politics Meets Production: The Future of Additive Manufacturing in the EU





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State of the industry

Explanations for recent negative sentiment

1. Fluctuating hardware sales

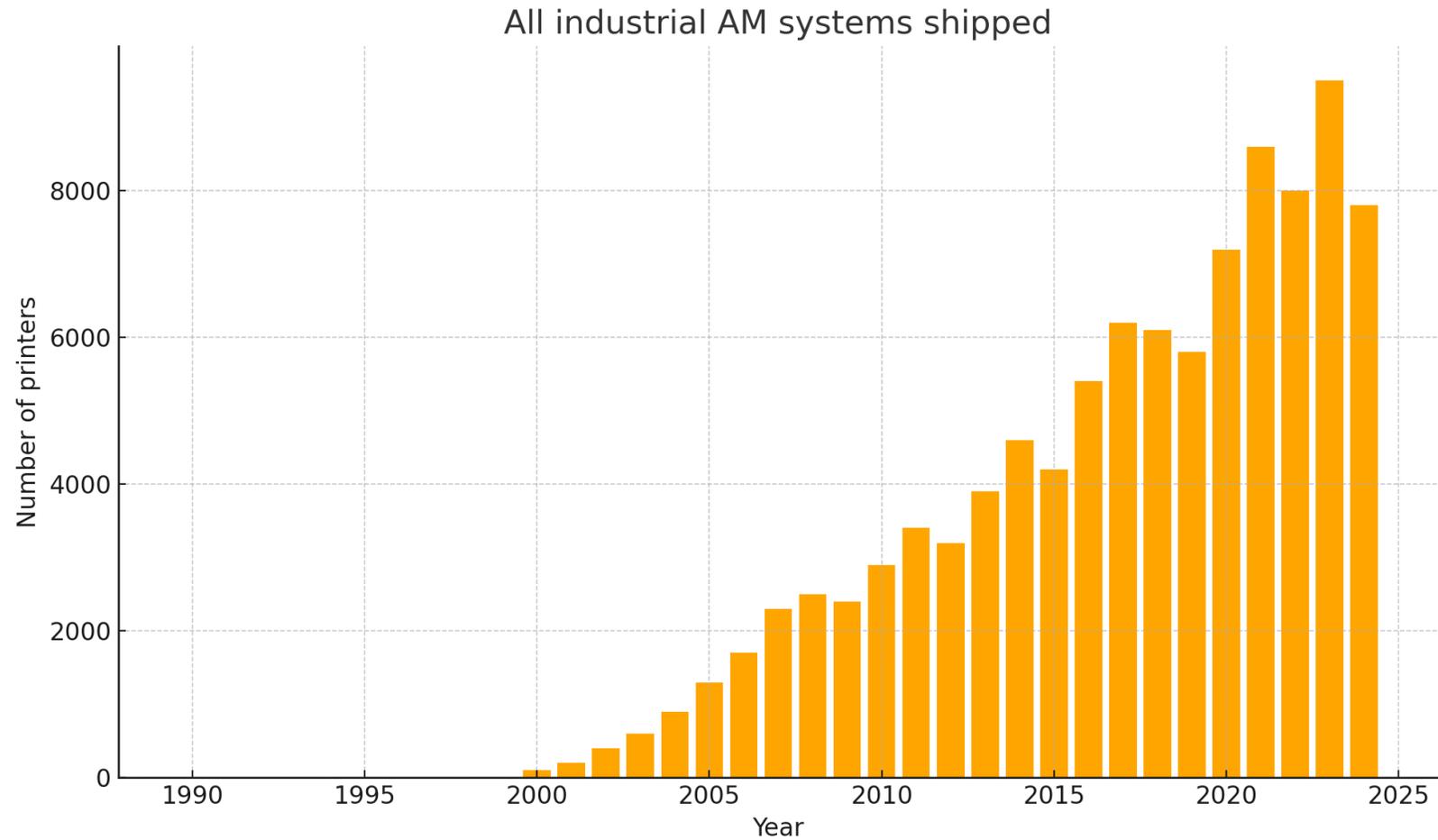
- Ongoing market consolidation
- Aggressive competition
- A recession in many Western regions
- Export tariffs
- Sustainability applications below expectations

2. Withdrawal of Western investors towards new emerging technologies

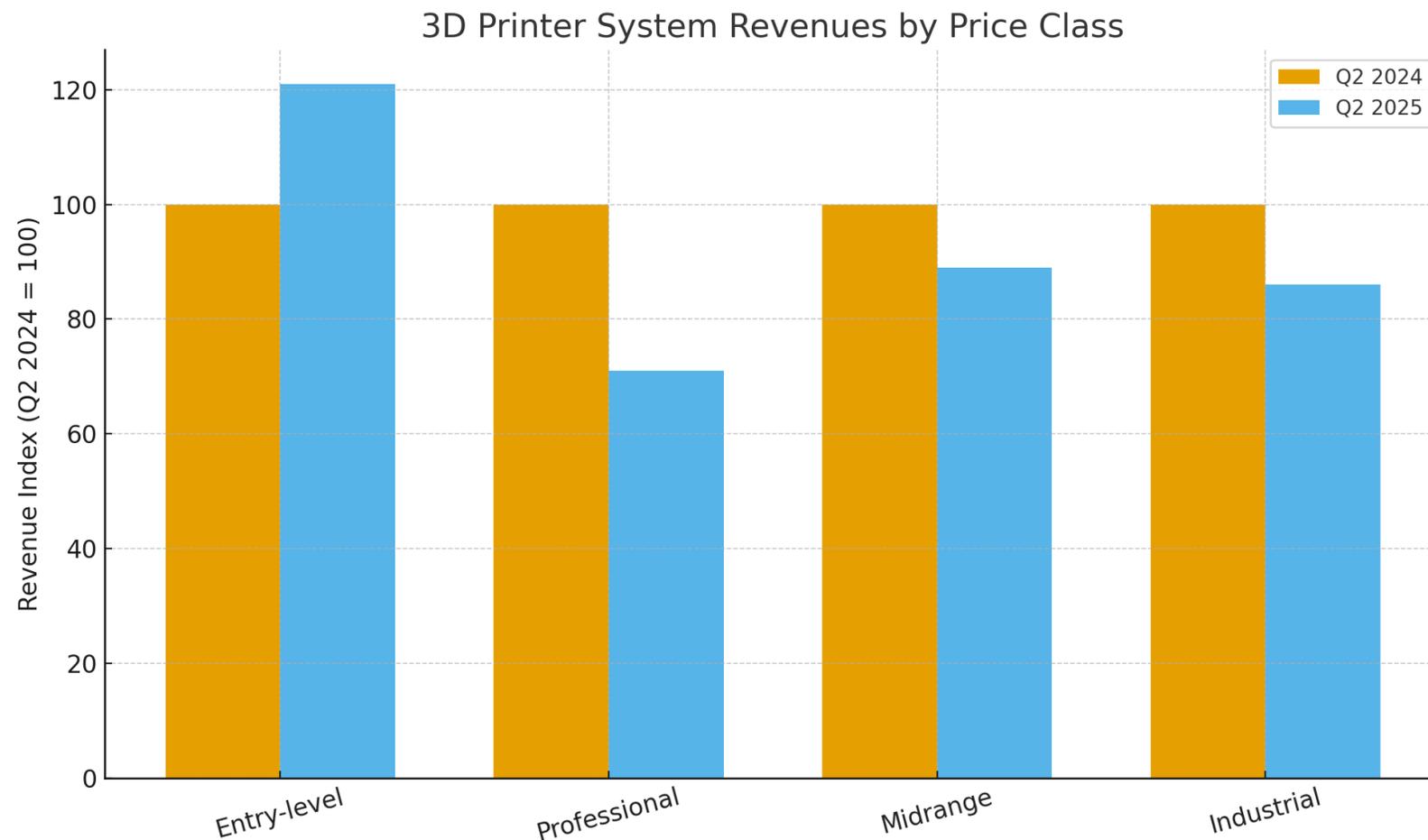
3. Complex standardisation & regulations

4. Europe has a systemic competitive disadvantage

Industrial AM systems shipped

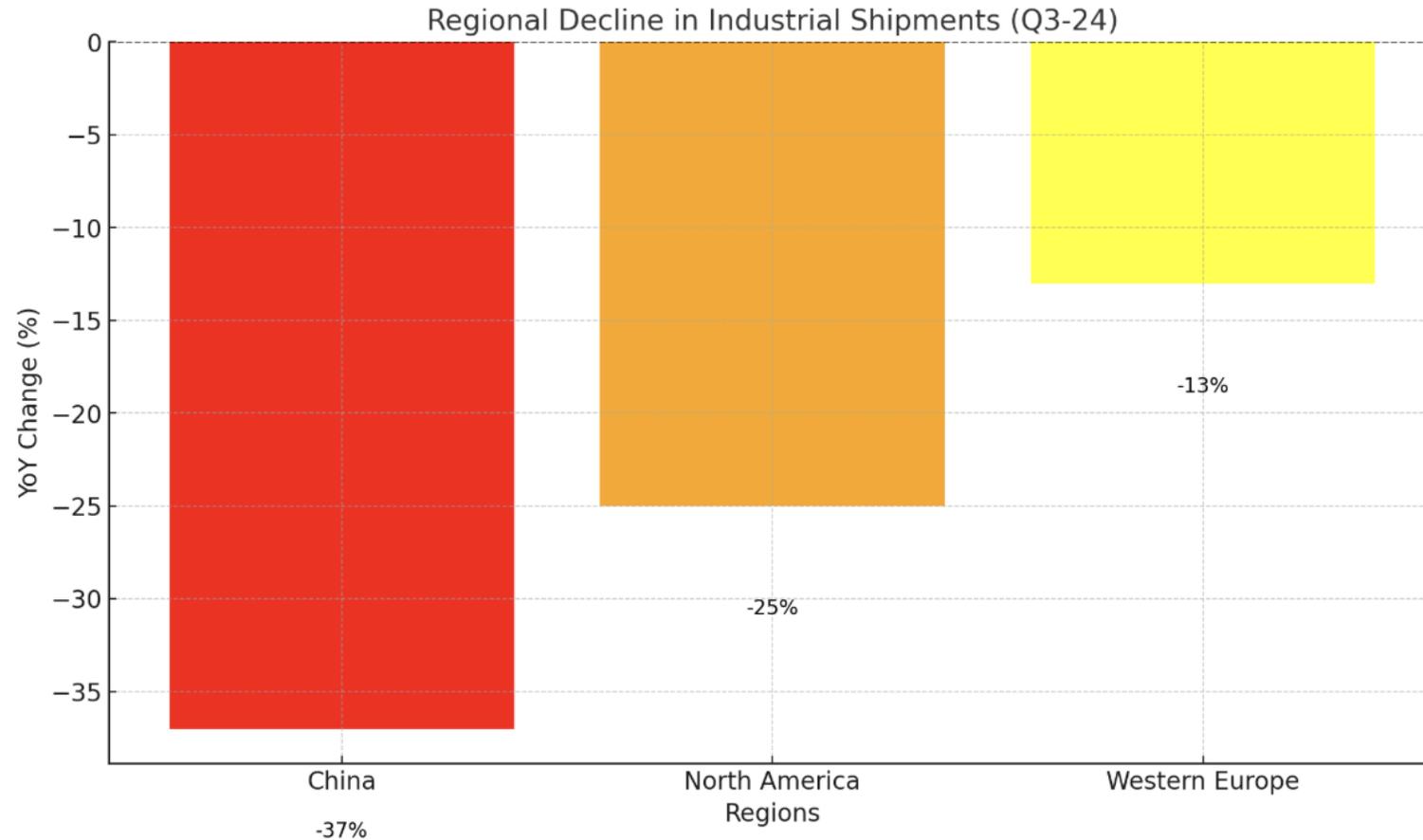


Industrial AM systems shipped



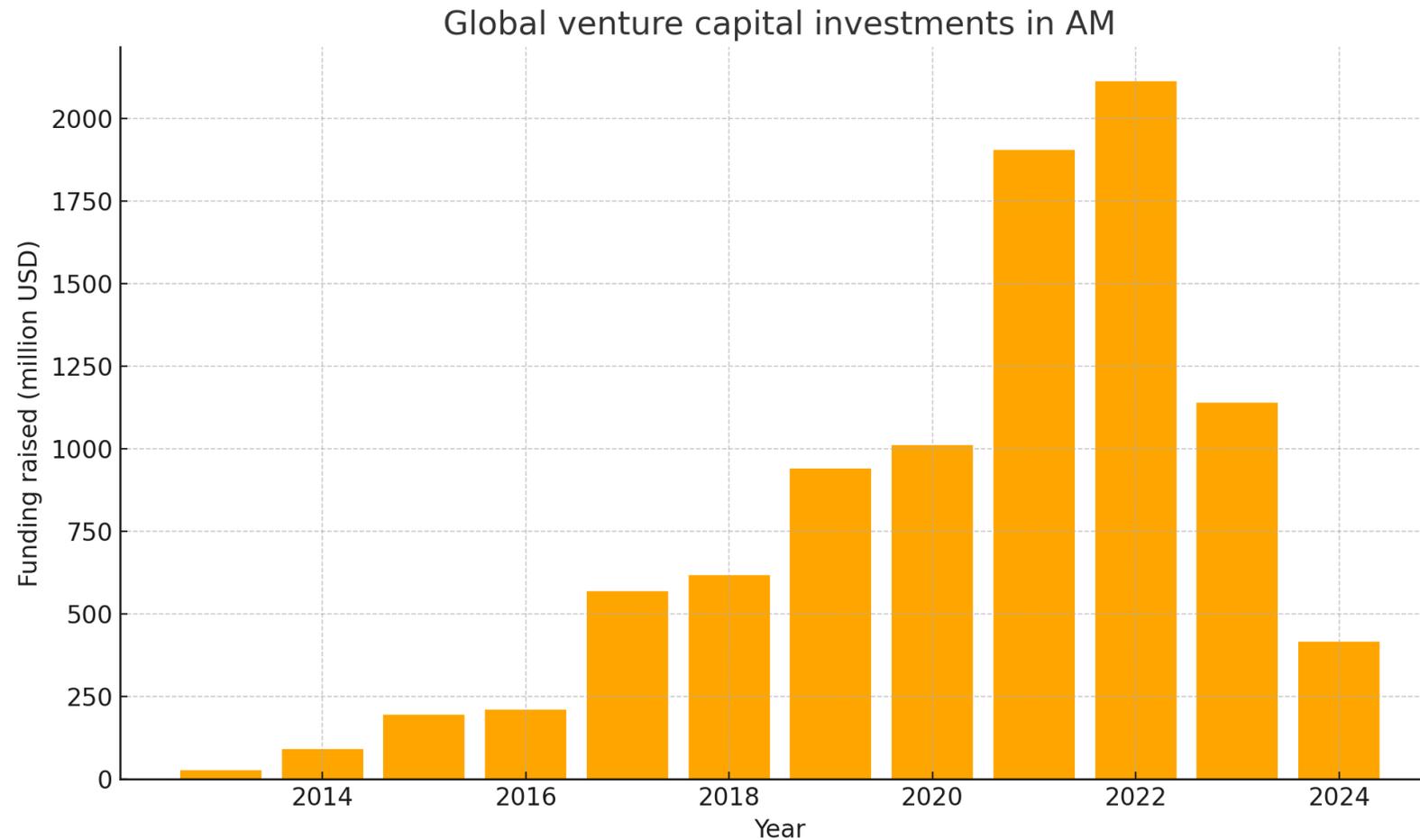
Industrial: \$100,000+
Midrange \$20,000–\$100,000
Professionals: \$2,500–\$20,000
Entry-level: under \$2,500

Industrial AM systems shipped



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Global venture capital investments



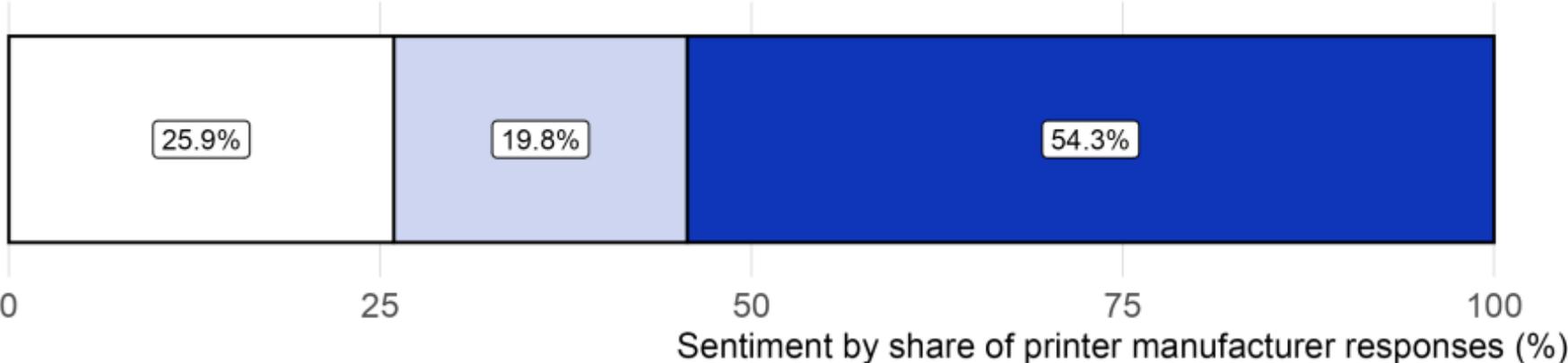
Sentiment is improving

Reasons to be optimistic

- AM applications always continued to grow exponentially
- Market consolidation is also sign of a maturing market
- Sales fluctuations are normal
- Entry and industrial segment are growing (again)
- Increased investment from the aerospace, defence, and energy industry
- Advanced materials and AI investments will boost AM capabilities
- Full pipelines: rising number of market approvals in regulated applications

AM industry sentiment analysis

□ Negative □ Neutral □ Positive



State of the industry

- Worldwide revenue in 2025: **\$24.2 billion**
- Industry growth from 2023-24: **+9.1%**
- Industry growth from 2024-25: **+10.9%**
- Regional growth (2024):
 - APAC: **+31%**
 - EMEA: **+3%**
 - AMER: **-5%**
- Categorical growth (2024):
 - Materials: **+20%**
 - Printing Services: **+12%**
 - Software: **+10%**
 - System Manufacturer: **-1,5%**

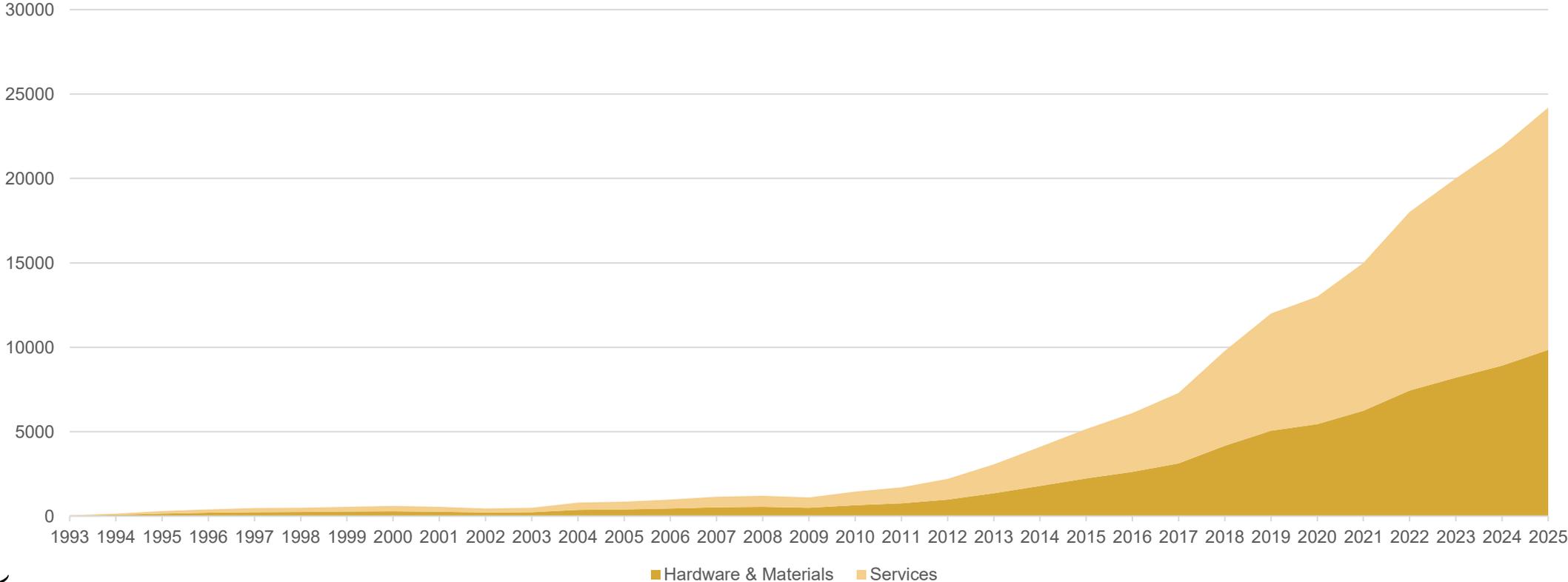
Job market

- # of companies with own AM departments: **> 12.000**
 - # of AM-specific companies (global) : **> 5.300**
- | | |
|------------------------------|-----------|
| Average number of employees: | 14 |
| Males: | 69 % |
| Females: | 31 % + |
| Female machine operators: | 12 % |
| Average time of employment: | 4.3 years |
| AM generations | > 3 |

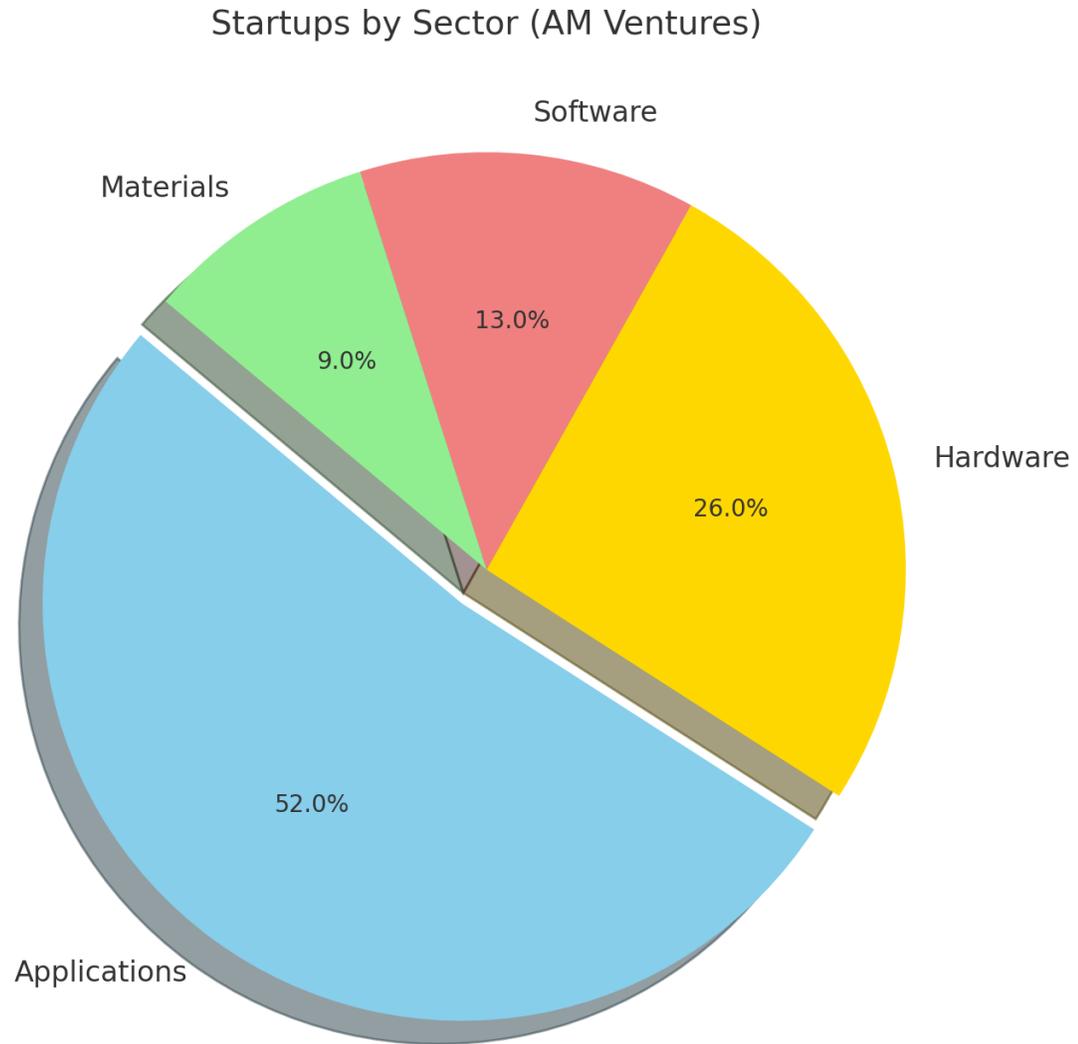
The long nose of AM

Global Revenue
in 1000 US\$

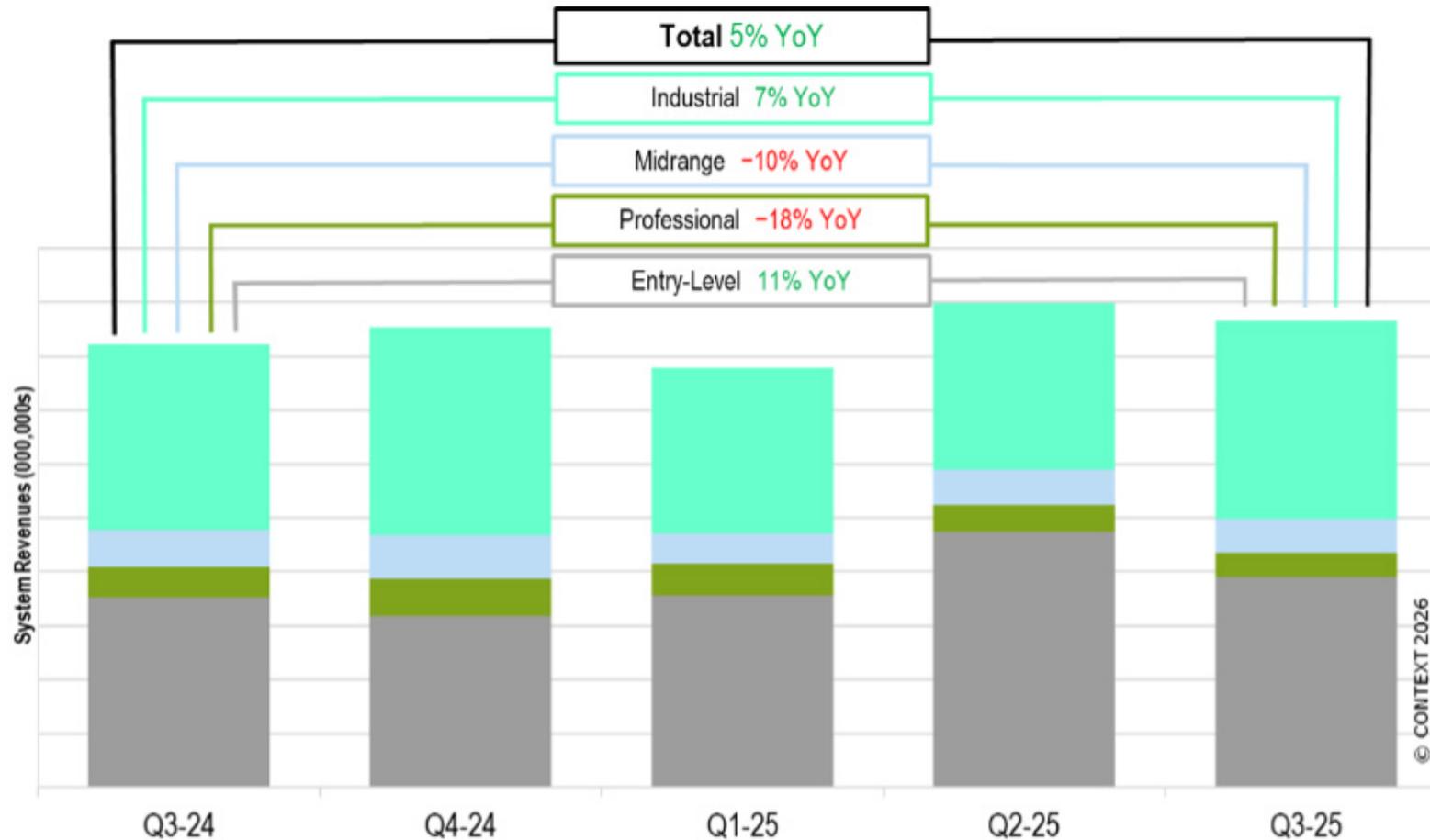
Industry growth



Startups by sector



Industrial systems are growing again



Industrial: \$100,000+
Midrange \$20,000–\$100,000
Professionals: \$2,500–\$20,000
Entry-level: under \$2,500

Positive side effects of AM

- **AM increases flexibility** in many domains: The ability of equipment and systems to adapt to changing operations, processes, production sequences, capacity, routing, automation, and material handling needs (Eyers et al. 2018)
- AM implementation **enhances process innovation, customer satisfaction, and overall performance** (Marzi et al., 2018).
- AM increases the importance of **access to technical knowledge, internal knowledge transfer within the company**, and customer proximity when making decisions about production locations. On the other hand, AM **reduces the importance of access to intermediate products** (Ysabel et al., 2022).
- AM leads to a shift in value creation and the **establishment of additional value streams**. It complements and strengthens the value creation of traditional methods rather than replacing them (Rylands, 2016).
- Make-or-buy: Arguments for In-house implementation: **protection of intellectual property, learning effects, skill acquisition, and increased enthusiasm** within the company (Friedrich, Lange, and Elbert, 2022).

*The growing political dimension of
AM in Europe*

AM as Enabling Technology for current Challenges

- Resilient Value Chains
- Defence
- Security and Critical Infrastructure
- Sustainability
- Energy
- Reshoring and maintaining the manufacturing economy in Europe

Competitiveness Compass

1. Closing the innovation gap
2. Decarbonising our economy
3. Reducing dependencies



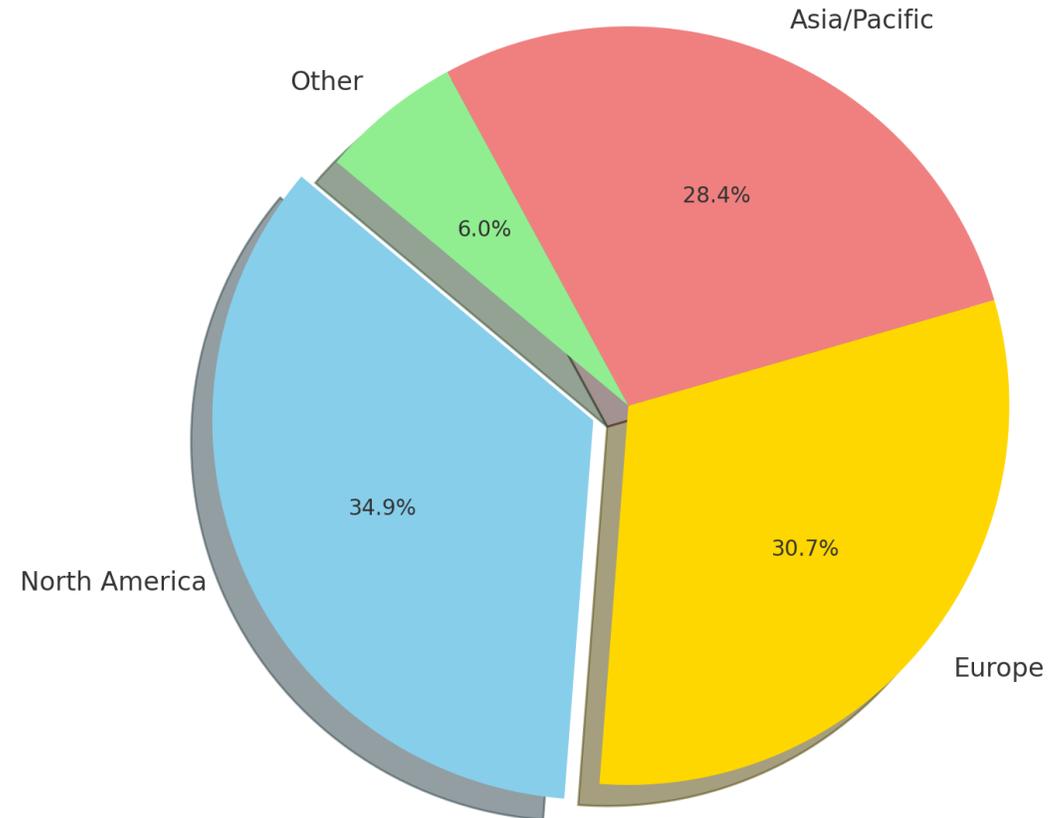
European Competitiveness Fund (ECF)

- Major 2028–2034 EU initiative designed to boost industrial leadership
- €234 billion proposal to enhance EU competitiveness against US and China
- Focus Area: Advanced Manufacturing, including robotics, AI, data-driven insights, and automation to create smarter, more resilient factories.
- Focus on higher TRL levels



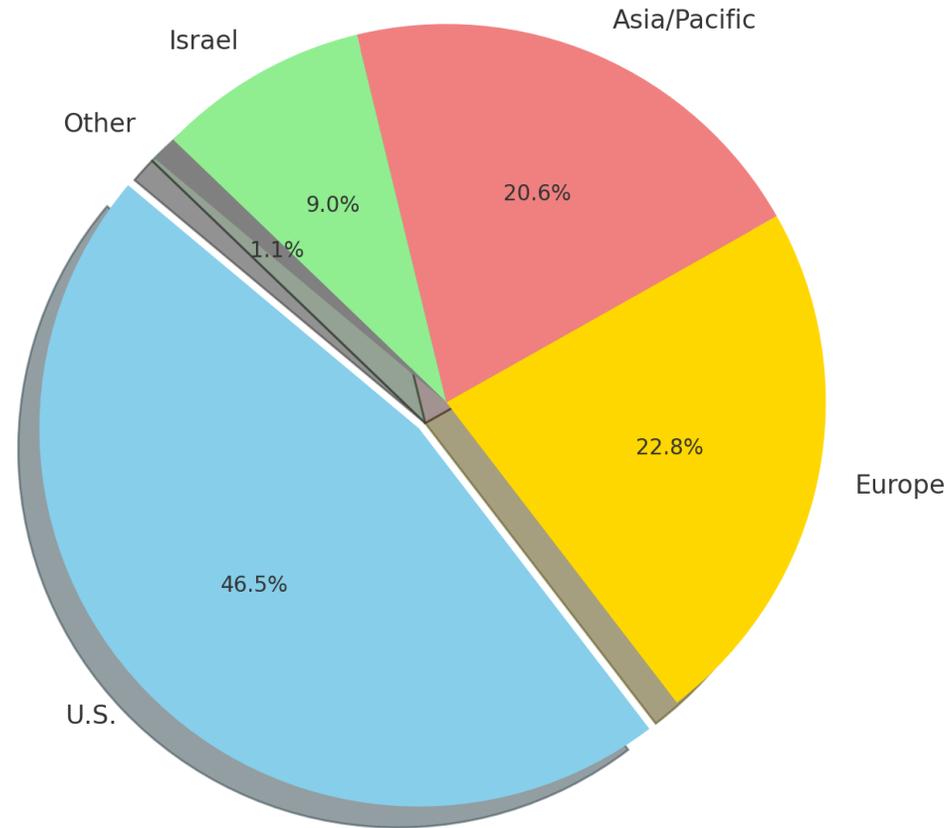
AM System Installation Base by Region

AM System Installation Base by Region (Wohlers Associates)



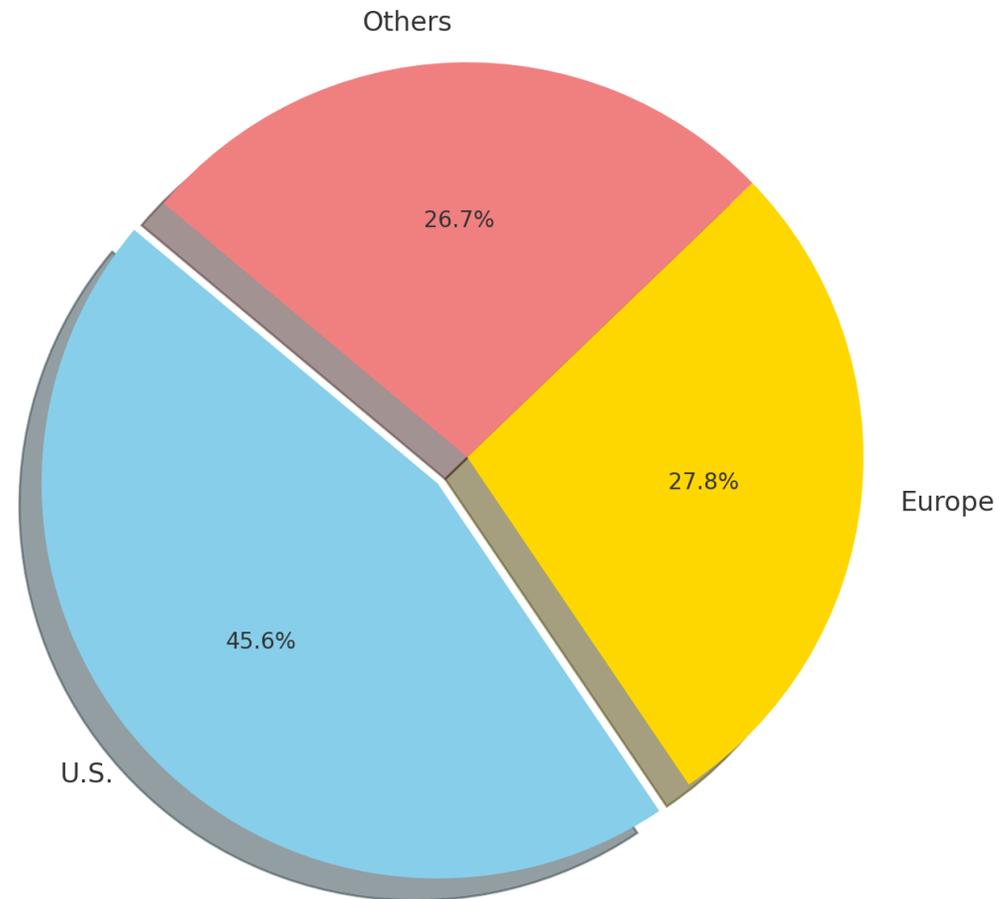
Industrial AM Systems sold per Region

Industrial AM Systems Sold by Region (Wohlers Associates)

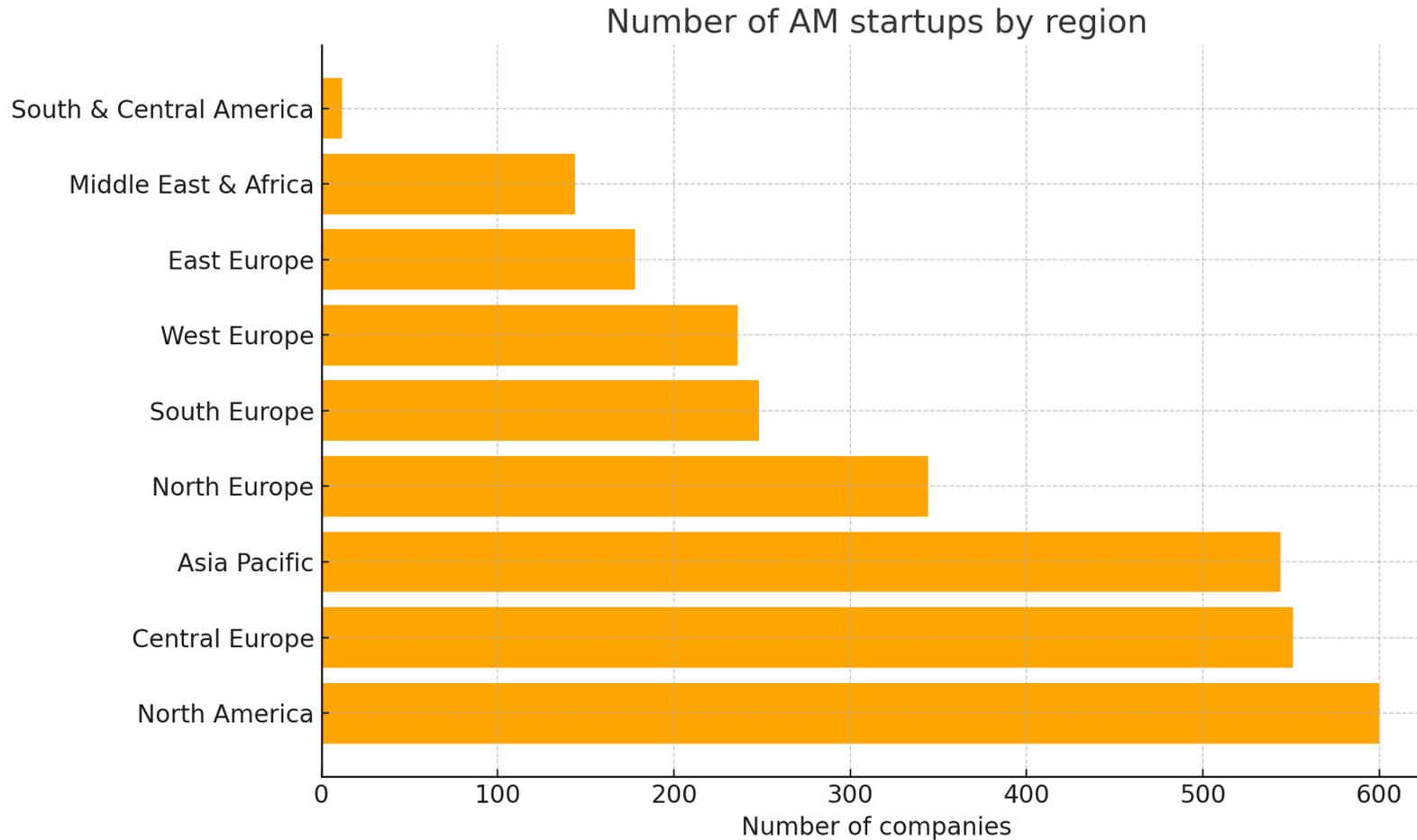


Investments in Startups by Region

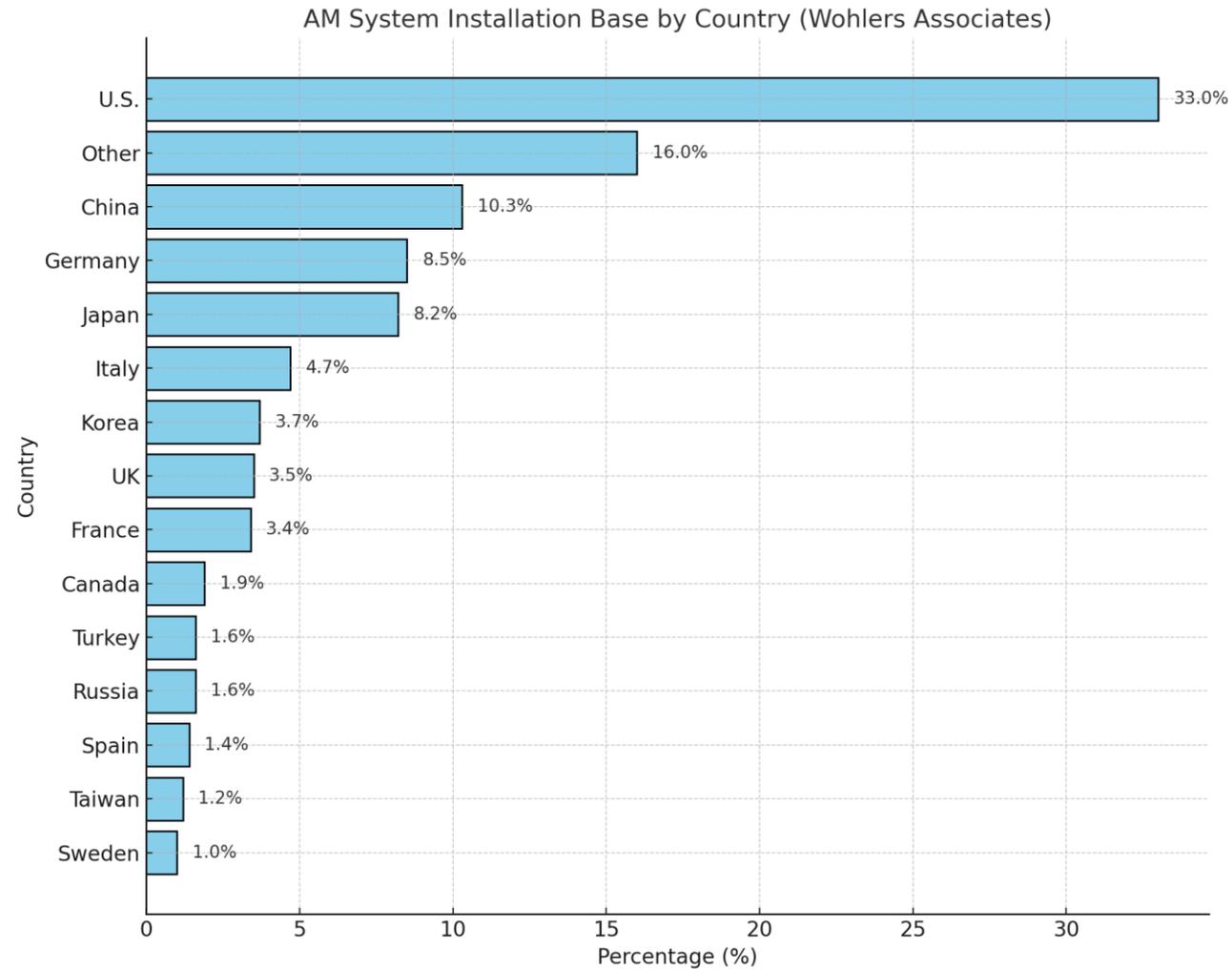
Investments into Startups by Region (Wohlers Associates)



Cumulated Number of Startups by Region



AM System Installation Base by Country



Europe's path out of disadvantage

What should we do?

1. The future is Advanced Manufacturing
2. A combination of deep materials & processes research (with AI)
3. Focus on critical application
4. Organize and collaborate with experts

European Initiatives



- **CECIMO Initiative**
<https://www.cecimo.eu/news/manifesto-for-a-competitive-european-additive-manufacturing-sector/>



- **(add)liance by iAM3DHub**
<https://globalamhubssummit.eu/>



Thank you!



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