



Press Release

The first European survey on key market trends in the Additive Manufacturing sector

Brussels, 16 February 2021

Between September and October 2020, CECIMO, the European Association of the Machine Tool Industries and related Manufacturing Technologies, organized the first round of its *European Additive Manufacturing Survey*, which aims to assess key market trends in the Additive Manufacturing (AM) sector.

Launched by CECIMO with the cooperation of five national associations Italy, Switzerland, Austria, Spain, and the United Kingdom, this survey aims to collect quality data directly from the industry and help companies outline a European overview of the main trends in the AM market.

During this first round, CECIMO received a total of 86 replies from the national associations that take part in this project.

It is the first time a survey is conducted to collect data directly from 3D printing companies that operate in the participating countries. It is a six-month survey, and it will help the industry record trend indications for key business areas, such as total business, AM exports, orders by type of material, client industry demand and trend investment.

Due to its comprehensive structure, the survey will help shed light into the European AM business cycle and the overall industry players expectations as to the production, demand, and investment, among other relevant aspects of the market.

In terms of results, the survey shows that:

- AM total business and AM exports both register relatively strong positive balances in all categories (products and parts, machines, materials and services), which would outline a growth scenario for AM business in the European domestic and foreign markets.
- Material net balances show that potential growth lies ahead for all categories, yet some will probably fare better than others. For instance, metals, scores a strong 44,3% balance whereas plastics sees a 55,6% rate, which would imply that plastic will have a comparatively better growth path than metal, despite the positive outlook for this material.
- Lastly, considering AM-purchasing sectors, individual balances show seemingly diverging trends. Aerospace and automotive both register negative net percentages, -30% and -19,7% respectively. A tightening of AM business in these branches can therefore be expected in the short term. Conversely, the medical sector registers a 61% net balance, the highest score at sectoral level. AM orders for medical user therefore expected to expand strongly, following the AM sector's important contribution to the fight to contain the coronavirus pandemic.



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European Association of the Machine Tool Industries
and related Manufacturing Technologies

CECIMO will continue to represent the interest of AM sector, which we consider to be one of the most innovative and fast-growing industries in Europe. As preparation for the second round of the survey begin, CECIMO and its national associations continue to work hard to improve the data provided to its members and turn this new trend survey into an essential tool for companies, market analysts and policymakers.

About CECIMO

CECIMO is the European Association of the Machine Tool Industries and related Manufacturing Technologies. We bring together 15 national associations of machine tool builders, which represent approximately 1500 industrial enterprises in Europe (EU + UK+ EFTA + Turkey), over 80% of which are SMEs. CECIMO covers 98% of the total machine tool production in Europe and about 35% worldwide. It accounts for more than 150,000 employees and a turnover of approximately 17 billion euros in 2020. More than three quarters of CECIMO production is shipped abroad, whereas half of it is exported outside Europe.

For media enquiries, contact:

Filip Geerts, Director General of CECIMO

Tel +32 2 502 70 90

filip.geerts@cecimo.eu