

KEY MARKET TRENDS IN THE EUROPEAN ADDITIVE MANUFACTURING SECTOR

July 2021

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AM Survey Second Round

Between April and May 2021, CECIMO, the European Association of the Machine Tool Industries and related Manufacturing Technologies, organized the second round of its European Additive Manufacturing Survey, which aims to assess key market trends in the Additive Manufacturing (AM) sector.

Launched by CECIMO, in cooperation with national associations, 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 second round, CECIMO received a total of 59 replies from the national associations that are taking part in this project.

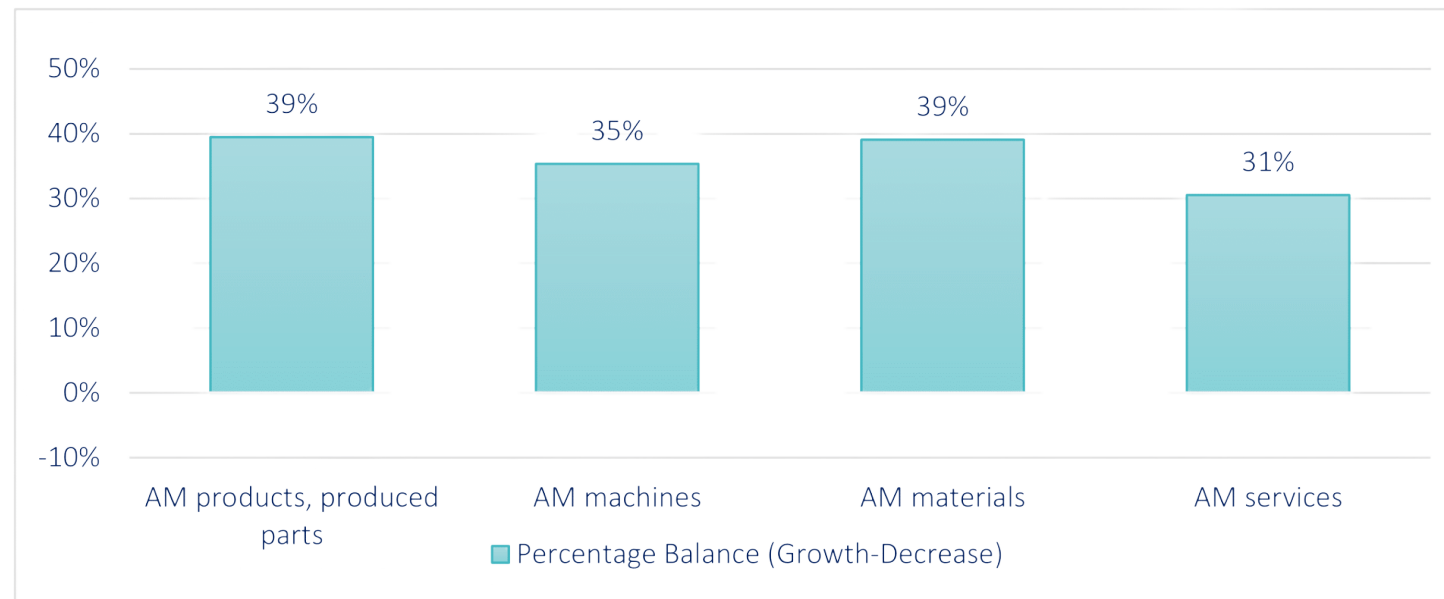
It is the second time CECIMO conducts this survey to collect data directly from 3D printing companies that operate in the participating countries. It is a six-month survey that will help the industry record trend indications for key business areas, such as domestic business, AM exports, orders by type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

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



AM TREND INDICATION OF THE DOMESTIC BUSINESS

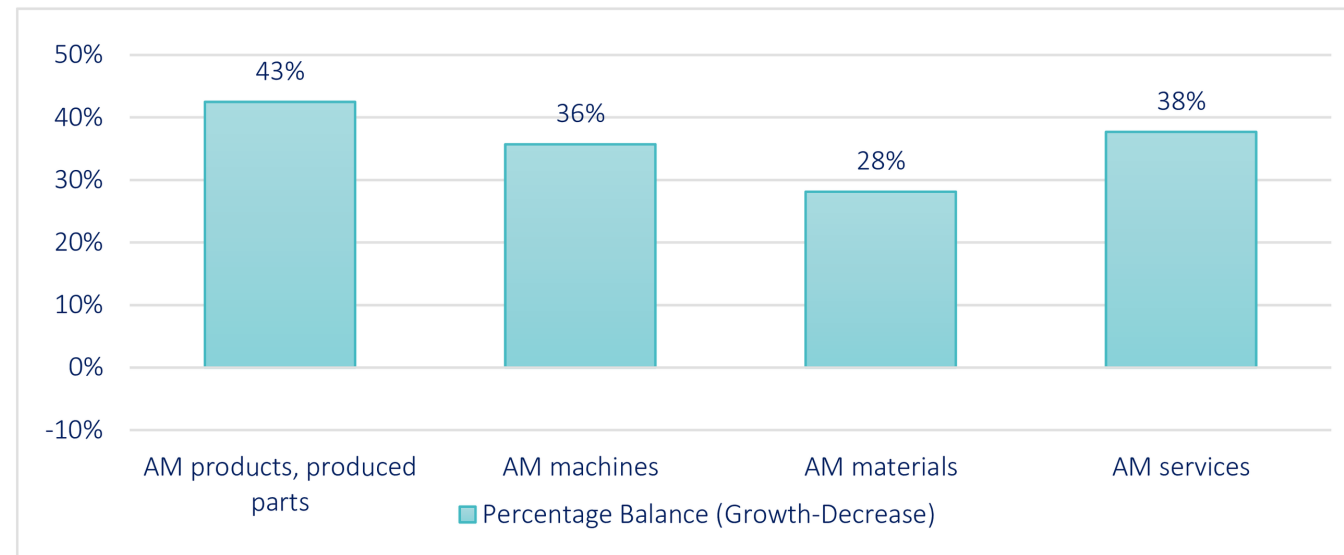
The AM trend indication of the domestic business reflects the trend of new orders on the home market over the next six months. According to results, the trend shows growth path in all AM categories (products and parts, machines, materials and services). The highest growth is expected in the AM products/produced parts and AM materials category, reaching a positive net percentage balance of 39%, just ahead of AM machines (35%). Compared with other categories, AM services have the lower but still strong growth path. In line with the positive business climate in European manufacturing in general, this trend outlines it's continuous growth scenario of AM business in the domestic market.



Source: CECIMO & National Associations

AM TREND INDICATION OF THE EXPORTS

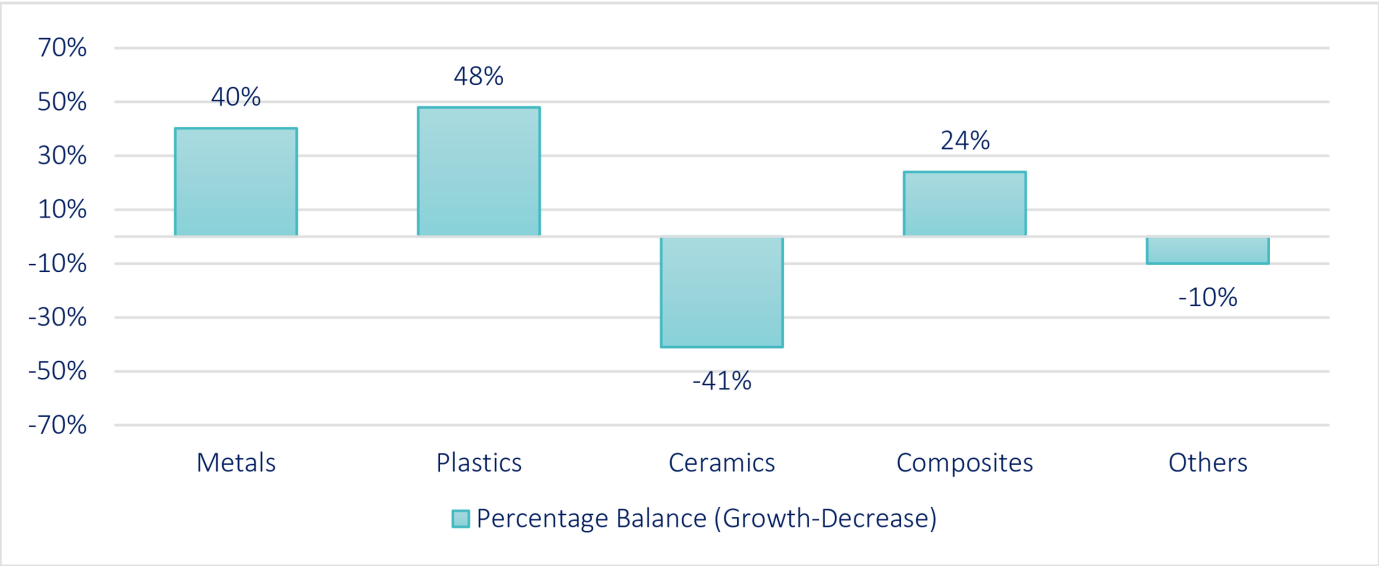
The AM trend indication of the new orders on the foreign market over the next six months shows a similar path to the case of domestic orders. The highest expectations, exceeding those of the home market, are in the category of AM products/produced parts, with a strong net positive balance of 43%. AM services and AM machine categories on the foreign market are also experiencing a continuous growth path. A lower, but still moderate positive outlook (28%), is also expected in the AM materials categories, which would outline a continuous growth scenario of AM business in the foreign market.



Source: CECIMO & National Associations

AM MATERIAL TREND INDICATION

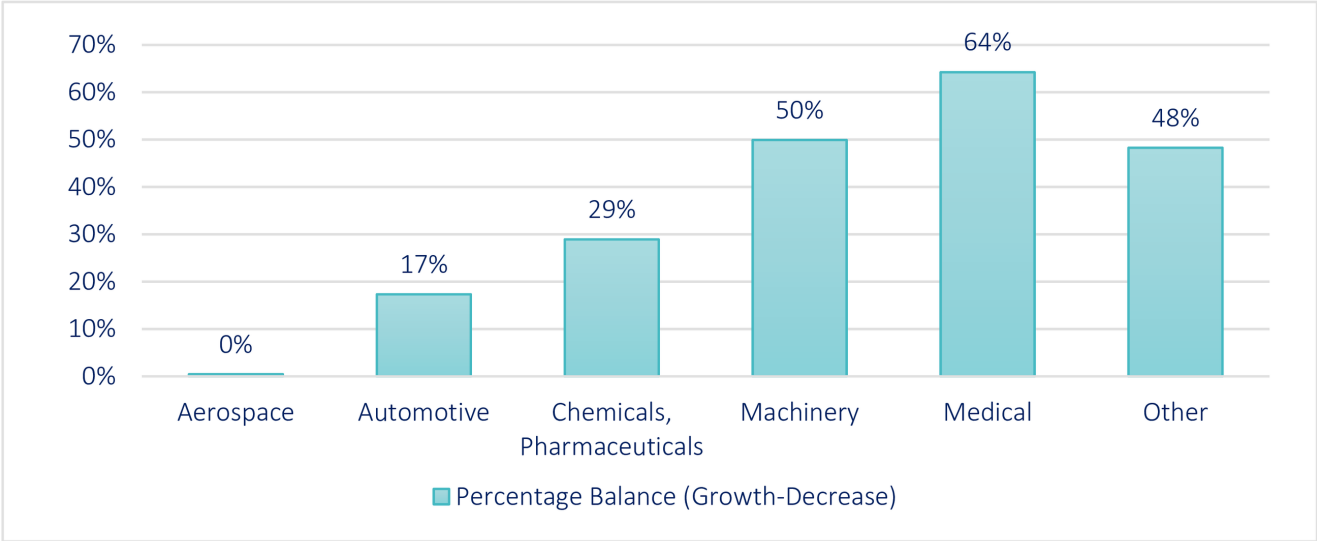
Materials' net balances show that potential growth lies ahead for three categories, yet some will likely fare better than others. For instance, plastics, scores a strong 48% balance, whereas metals are at the 40% rate, which would imply that plastics still have a comparatively better growth path than metals, despite the positive outlook for this material. A negative trend is expected in the Ceramics category (-41%), which has deteriorated considerably since the previous reporting period. Negative growth is also expected for Other AM materials, while Composites are expected to experience moderate growth with a net balance of 24%.



Source: CECIMO & National Associations

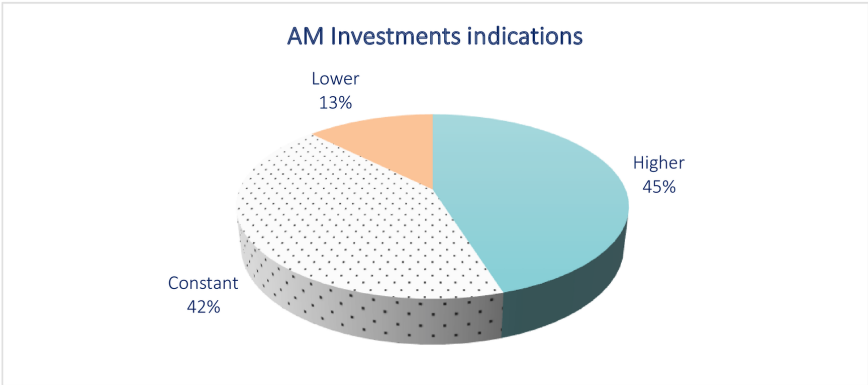
BUSINESS TREND INDICATION: CLIENTS

Considering the AM buying sectors, the outlook for new orders is generally positive, even individual balances show apparently diverging trends. Expectations for new orders from the Aerospace industry are better than during the previous reporting period, but they are still not on the path to growth. The Chemicals & Pharmaceuticals sector shows a significant growth path, recording a level of 29%, higher than the Automotive sector, which also recorded a positive growth balance of 17%. The indications for the Machinery sector, thanks to the rebound in industry, are on high growth levels reaching a net balance of 50%, placing this sector in second place at the sectoral level. The Medical sector registers a 64% net balance, retaining the highest trend indication score at sectoral level. AM orders for medical use therefore are still expected to expand strongly, following the AM sector's important contribution to the fight to contain the coronavirus pandemic.



Source: CECIMO & National Associations

According to the answers concerning the indication of trend for AM investments managers have higher growth indications than in our previous survey, reaching the higher positive net balance at the level of 32%.



Source: CECIMO & National Associations

Due to positive trend indications, the AM Confidence Index is higher compared to the previous reporting period and maintains at 66 points. **The AM growth path is expected to continue in the following period thanks to the growth indication scenario for both domestic and international business, supported by the positive investment path.**

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. The next round of AM surveys should take place from September to October, with results expected by mid-November.

Methodology: for each country, survey responses are analysed as the difference between the share of companies reporting growth and that of companies reporting a decrease in their trend indication. A positive balance provides a growth indication and a negative balance reflects a decline. National results are weighted with equal shares for the participating CECIMO countries in order to have a European figure.

Note: The figures for the second round are based on responses from the following countries: Italy, Spain, Switzerland and the United Kingdom.



INTERNATIONAL CONFERENCE ON ADDITIVE MANUFACTURING – ICAM

CECIMO invites you to the one of the world's leading trade show for metalworking across the globe, EMO Milan 2021, where we will be organising the International Conference on Additive Manufacturing – ICAM on 7 October 2021.

Additive manufacturing technologies have a strategic role in this new manufacturing era, allowing companies to achieve unique design capabilities and new workflow processes. In that respect, the conference will look at how new hybrid solutions can combine additive manufacturing with regular manufacturing methods and score high marks in agility, flexibility and level of productivity.

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 33% worldwide. It accounts for more than 150,000 employees and a turnover of 19,7 billion euros in 2020. More than three quarters of CECIMO production is shipped abroad, whereas half of it is exported outside Europe.

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