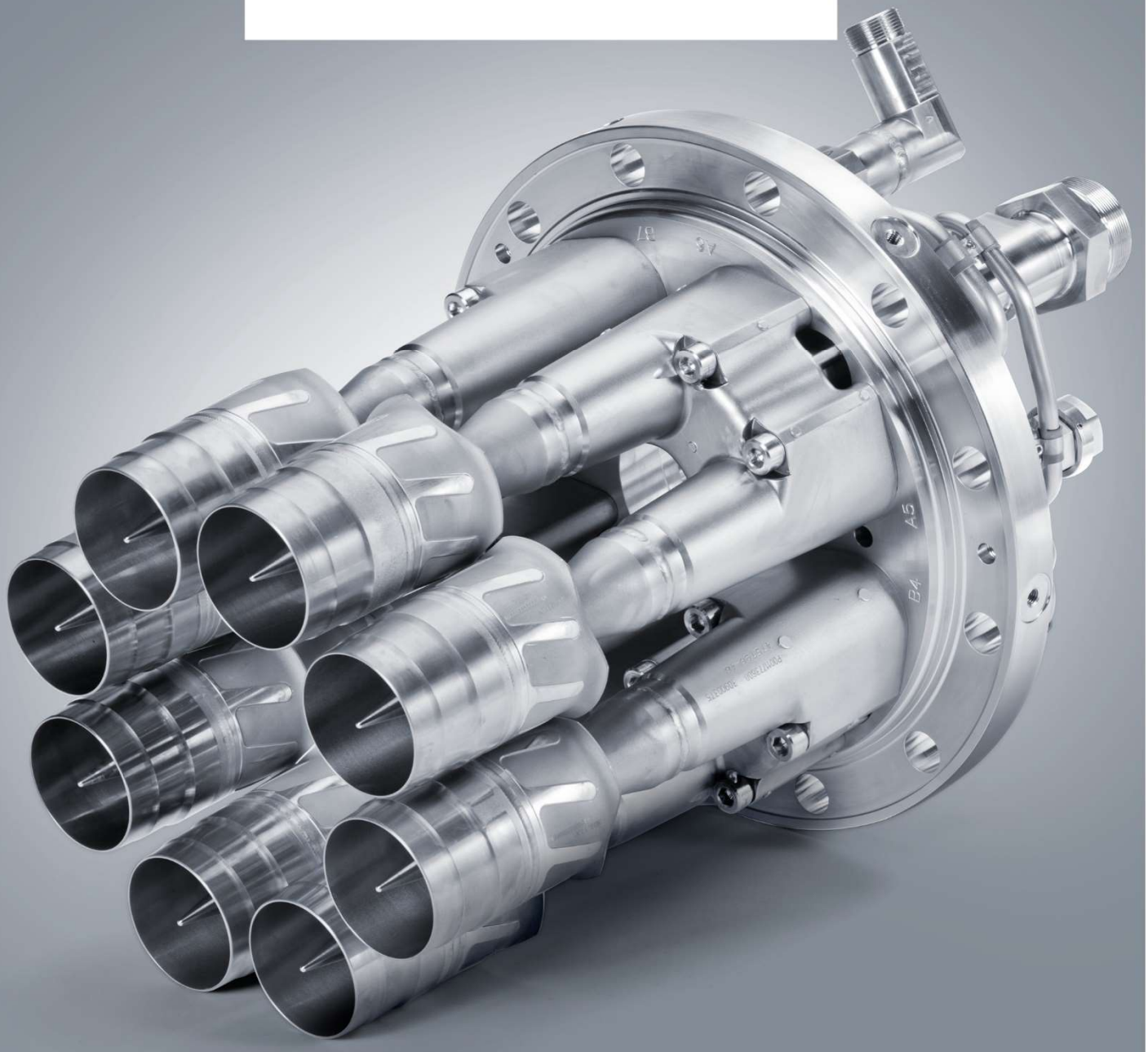
AMPOWER REPORT 2020

Metal Additive Manufacturing



THE INDEPENDENT MARKET & TECHNOLOGY SOURCE

Analytics of the international market size · Covering all leading user industries
Supplier and user perspective · Representing more than 90% of the installed system base
Global database of system, service and material suppliers with more than 380 entries
Comprehensive cost calculation tool · Catalogue with more than 60 industrial applications

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Preface: An industry matures

Metal Additive Manufacturing pushes ceaselessly into production. More and more users find suitable and positive use cases that lead to profitable business activities. However, a great number of users had to take a bumpy and lengthy road in order to achieve this. Training of engineering personnel, process and application development as well as the implementation and qualification of machinery is required in order to reap the benefits of this fascinating manufacturing technology. Research and development durations of multiple years are not uncommon.

To choose the right metal Additive Manufacturing method is as complex as ever and will continue to be a challenging decision in this highly dynamic technology environment. There are currently 18 known metal Additive Manufacturing technologies with different fabrication principles and feedstock types. While some technologies have already achieved a high maturity and spread in industry, others possess great potential to increase viability for applications and whole industries.

The total market of metal Additive Manufacturing has continued to grow in 2019. However, many system suppliers faced a difficult year in 2019. Especially the largest market of Laser Beam Powder Bed Fusion has become highly competitive with many new market entrants while total machine sales only increased marginally. Yet, the system suppliers increased their total revenue due to higher investments per machine as the systems become more complex and larger. The overall growth in revenue on the metal AM market was also driven by increased demand in feedstock and AM parts from third party service bureaus.

During the finalization of this report in the beginning of April 2020, the whole world was in the grip of the COVID-19 pandemic. Its effect on business in general and metal Additive Manufacturing in specific is impossible to foretell. The majority of interviews of AMPOWER's survey were taken early in 2020 when the full effect of the pandemic was not yet visible. Most of the projections given to AMPOWER by the interviewed partners did not consider a global shut down and its economic effects. Therefore, the projections in this report do not include correction factors from a potential slowing-down of the global economic. However, a chapter in this year's report is dedicated to the outlook and potential scenarios to put the suppliers' and buyers' predictions into perspective.

The market and technology report, the databases as well as the application catalogue of real-world industrial use cases are available online through an interactive website at

https://additive-manufacturing-report.com

This PDF is compiled from the data available online.

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