

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

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Abstract

Industrial additive manufacturing is facing a period that can easily be read as a “crisis”: global industrial machine shipments have declined, consolidation is accelerating, investor attention has shifted toward other emerging technologies, and complex standardisation and regulatory requirements slow down adoption, while Europe faces a systemic competitive disadvantage. This talk reframes these signals as part of a maturing market and argues that AM’s long-term trajectory remains positive. Using recent industry indicators (e.g., Wohlers/CONTEXT/AM Ventures), we highlight that worldwide AM revenue reached \$21.9B in 2024 (+9.1% YoY), with strong growth in materials (+20%), printing services (+12%), and software (+10%) even as system manufacturers slightly declined.

The core contribution is a practical, industry-facing view of why AM is becoming increasingly political in Europe: as an enabling technology for resilient value chains, sustainability and energy goals, security and critical infrastructure, defence, and reshoring/retaining manufacturing capacity.

We conclude with actionable implications for companies and stakeholders, where to expect regulatory “pipelines” to open in highly regulated sectors, why cross-industry collaboration matters, and how European initiatives (e.g., (add)liance) can help translate policy momentum into scalable production outcomes.