

AMPOWER REPORT 2026

# Management Summary

Now including  
**Desktop  
AM market**

## THE INDEPENDENT MARKET & TECHNOLOGY SOURCE

Analytics of the international market size segmented by technology, industry, region and material  
Covering all leading user industries • Supplier and user perspective • Representing more than 95% of the installed system base • Including a global database of equipment, part manufacturing and material suppliers as well as machines • Market pricing trend analysis for parts and materials

# Content

|                                                 |    |
|-------------------------------------------------|----|
| Data Basis for AMPOWER Report .....             | 3  |
| Additive Manufacturing market development ..... | 4  |
| Regional machine sales .....                    | 5  |
| Metal PBF machine market share .....            | 6  |
| Market development by industry .....            | 8  |
| Polymer desktop equipment market .....          | 9  |
| Table of content .....                          | 10 |

## Key facts and take-aways

- 1 Industrial AM market regains growth of over 5% after flatline in 2024**
- 2 Chinese industrial machine OEM still mainly serve domestic market**
- 3 Top 10 metal PBF OEM loose market share globally**
- 4 Defense and Space continue to drive metal AM adoption**
- 5 Desktop polymer AM market exhibits over 30% growth in the past 5 years**

## DATA BASIS FOR AMPOWER REPORT

# Thorough coverage of AM market with high share of primary data

---

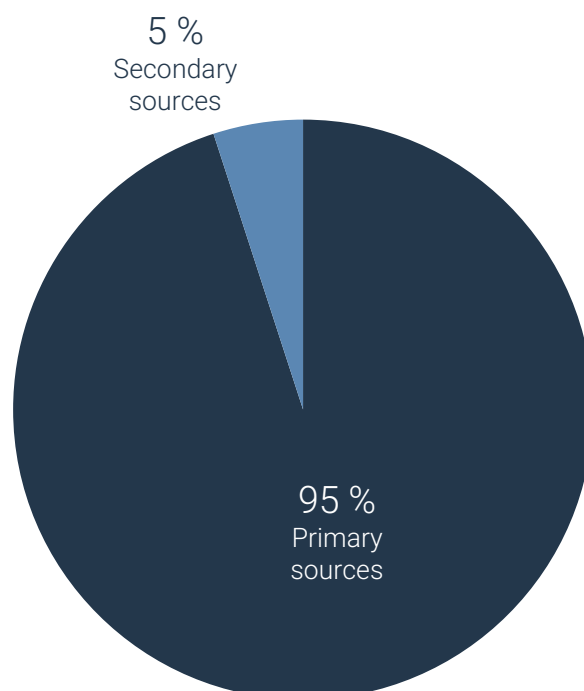
Basis for the AMPOWER Report are over 300 personal interviews every year as well as secondary research from publicly available sources.

The main source for the AMPOWER Report are direct interviews with suppliers of Additive Manufacturing equipment, Material and Part Manufacturing services as well as users of the technology. The personal interviews were conducted directly by AMPOWER staff. The respondents were typically the respective Additive Manufacturing managers or directors with insight into the technological as well as economical company figures. The total number of data points of the AMPOWER Report 2026 data acquisition exceeds 50,000.

Additional historical data and qualitative information such as company reports, global economical data and trading statistics was used to describe the AM market most accurately.

The AMPOWER forecast is derived by merging the projections of buyers and suppliers of Additive Manufacturing. While supplier can forecast also towards new applications, markets and industries, today's users add a very precise perspective based on existing manufacturing roadmaps.

## Distribution of sources for the AMPOWER Report since 2019



# Metal and polymer markets grow in lockstep

The overall industrial Additive Manufacturing market, including metal and polymer equipment, materials, and part manufacturing services, is valued at EUR 11 billion in 2025, with a projected compound annual growth rate (CAGR) of 14% until 2030.

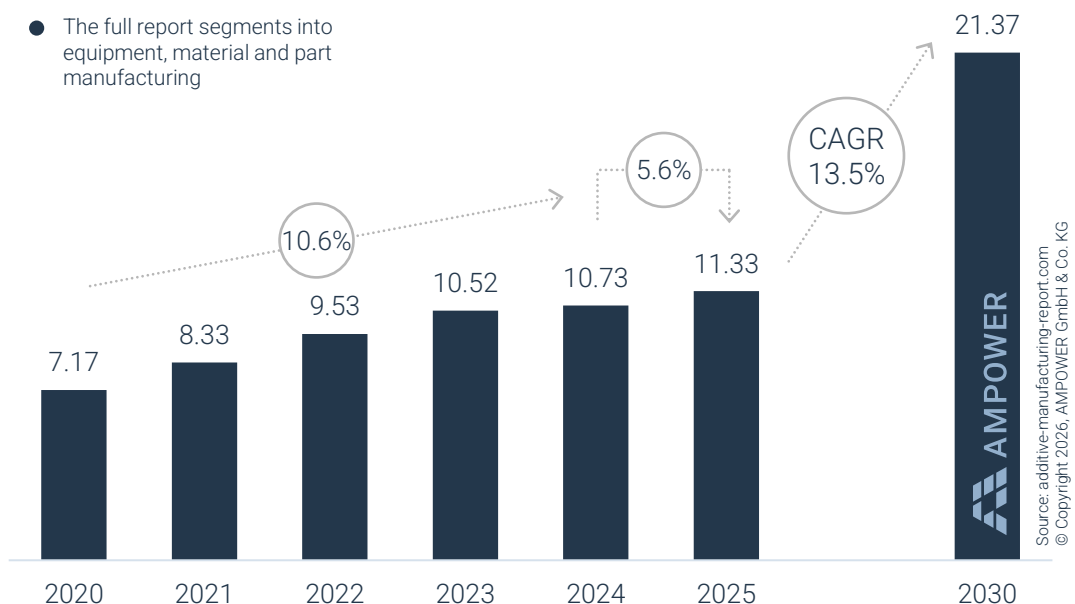
In 2025, the global industrial metal and polymer Additive Manufacturing market size reached EUR 11 billion encompassing equipment, material, and part manufacturing supplier sales. This represents a growth of 6% from 2024. The metal and polymer AM markets grew in a similar fashion.

The equipment sales revenue is roughly equivalent between metal and polymer machines. Combined revenue remained flat year over year as modest gains in metal were

offset by modest declines in polymer machine revenues.

The market underperformed relative to last year's estimates. Overall, projections indicate an annual growth rate of 14% for the total market, marginally exceeding the 13% forecast from a year ago. Suppliers are expected to generate revenues just under EUR 20 billion by 2030.

Global metal and polymer Additive Manufacturing market  
2020 to 2025 and forecast 2030 [EUR billion]



## MACHINE SALES BY REGION

# USA, China and Germany leading AM machine suppliers

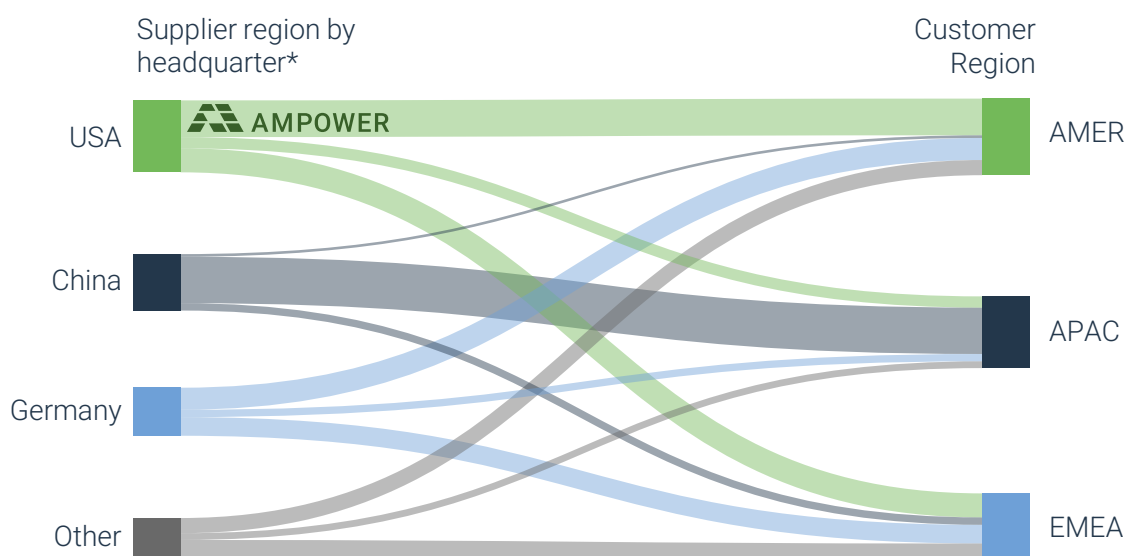
Over 80% of industrial AM machines come from USA, China and Germany. While Chinese exports are growing, their main customer market is still mainland China and some of their regional neighbors.

Industrial polymer and metal Additive Manufacturing machines are mainly sold by companies headquartered in one of those three nations. While Chinese OEM primarily deliver their machines in their domestic market and the APAC region, the US and Germany ship about half of their capacity globally.

US based companies have a much stronger footprint in polymers, while German Additive Manufacturing OEM have a traditionally large footprint in the metal market.

While the industrial machine market has a somewhat even distribution among the three regions and their key players, the desktop Additive Manufacturing market is much more driven by Chinese OEM. Over 90% of the desktop machines originate from China while the customer side is more evenly distributed between Europe, USA and APAC.

## Global metal and polymer industrial equipment revenue by supplier and customer region 2025 [EUR million]



Source: additive-manufacturing-report.com  
© Copyright 2026, AMPOWER GmbH & Co. KG  
\*NIKON SLM SOLUTIONS headquarter location Germany  
COLIBRIUM ADDITIVE headquarter location USA  
STRATASYS headquarter location USA  
HP headquarter location USA

METAL PBF MACHINE MARKET SHARE

# Top 10 in metal PBF lose market share globally

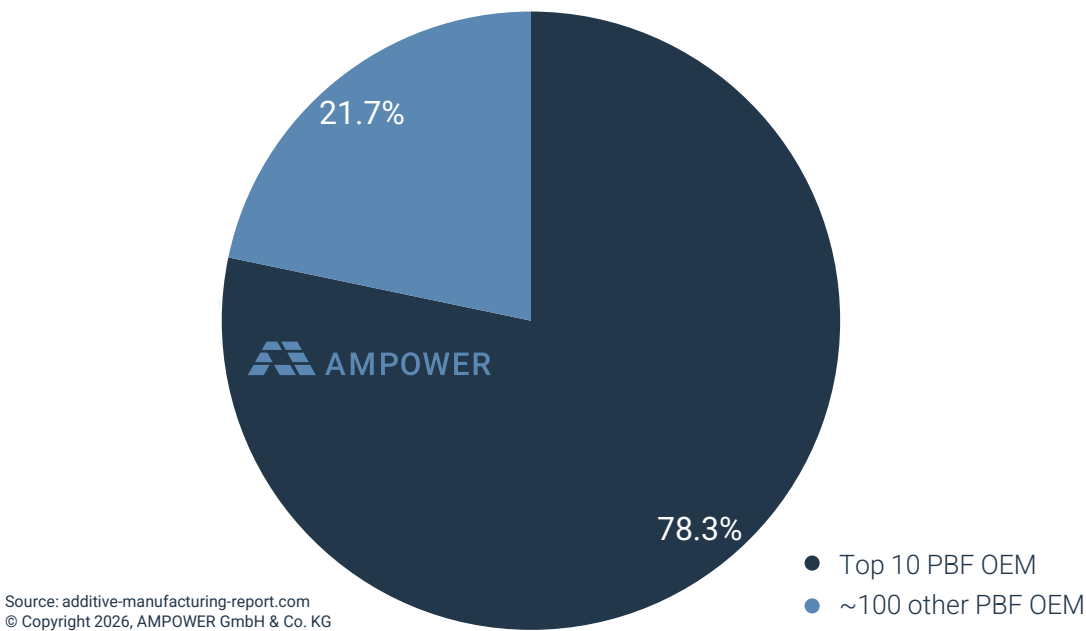
More than half of the revenue within the metal PBF segment is generated by a handful of OEMs. The top 10 PBF OEMs account for nearly 80% of the market, playing a dominant role in the industry's development.

Laser Powder Bed Fusion remains the revenue-dominating technology in metal Additive Manufacturing, generating equipment revenue of more than a EUR billion holding a market share of over 80 % compared to all other metal AM technologies.

The top 10 PBF OEMs account for 78% of the market, a slightly lower share compared to 80% in 2024, but they continue to play a leading role in the industry's development. Companies

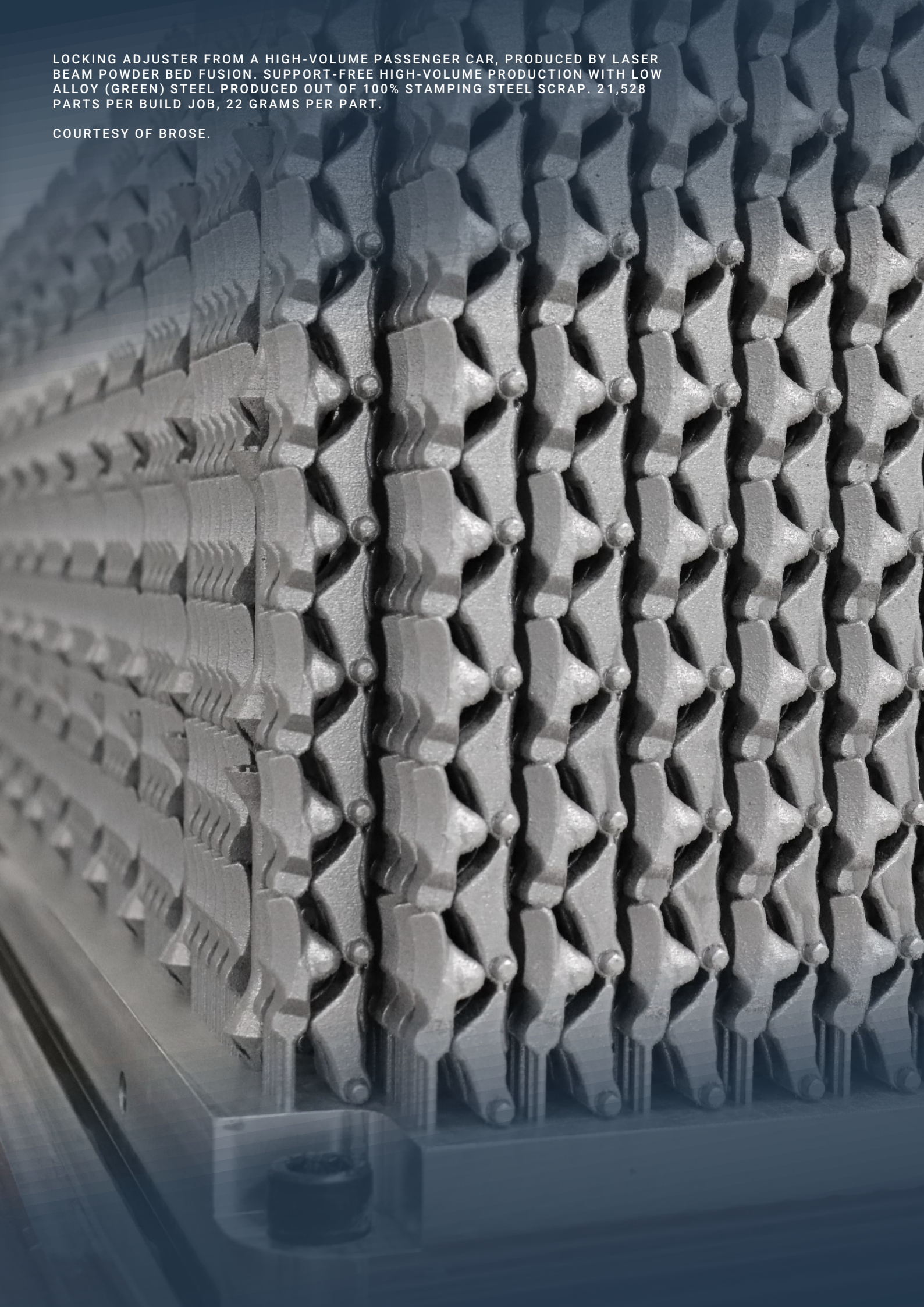
included in the top 10 are, for example, EOS, NIKON SLM SOLUTIONS, COLIBRIUM ADDITIVE, and Chinese OEMs such as BLT or FARSOON. In 2025, the number of active players offering solutions for Laser Powder Bed Fusion technology increased again, growing from 96 in 2024 to 107 in 2025. China, in particular, saw a surge of new market entrants, from startups to large entities such as HAITIAN, which recently entered the market.

Metal PBF equipment market share of Top 10 OEMs in 2026



LOCKING ADJUSTER FROM A HIGH-VOLUME PASSENGER CAR, PRODUCED BY LASER BEAM POWDER BED FUSION. SUPPORT-FREE HIGH-VOLUME PRODUCTION WITH LOW ALLOY (GREEN) STEEL PRODUCED OUT OF 100% STAMPING STEEL SCRAP. 21,528 PARTS PER BUILD JOB, 22 GRAMS PER PART.

COURTESY OF BROSE.



# Defense with robust growth projections

The defense segment continues to be the major growth driver in Additive Manufacturing equipment sales. Material and part manufacturing sales also benefit from this trend.

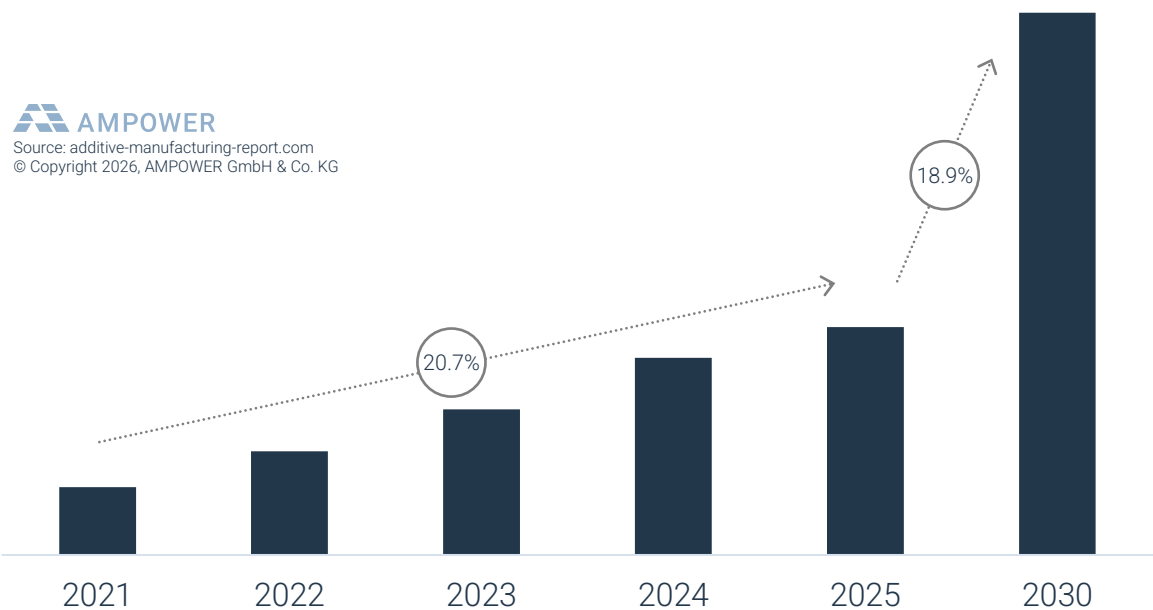
Defense equipment sales exhibited growth rates of over 20 % in the past 4 years. This Vertical demonstrates high interest in AM due to short development cycles and willingness to adopt new technologies if added value can be proven. While in 2021, metal AM was the main beneficiary of this trend, the recent expansion in drone production also fueled machine investments in the polymer segment, mainly with powderbed fusion and Material Extrusion technologies. Global armies are solving major supply chain and spare part capability issues

with Additive Manufacturing while military OEM and startups utilize the technology for next generation rockets, hypersonics, naval casting replacements and drones.

Besides Defense, the Consumer Goods sector has seen significant growth in polymer and metal as well. While the metal sector benefited from high tech electronics such as the APPLE watch case, the Consumer Goods sector has seen significant expansion in the sporting goods and footwear industry.

## Global metal and polymer Additive Manufacturing equipment revenue in defense 2023 to 2025 and forecast 2030

● Defense & Space



# Revenue in desktop segment outpaces industrial AM vendors

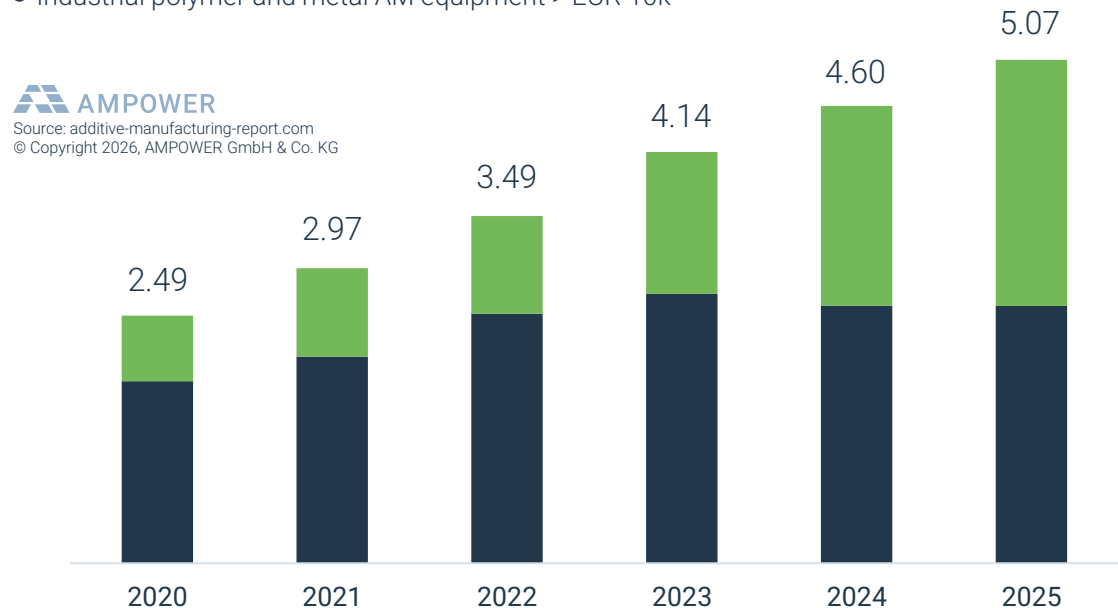
The AMPOWER Report 2026 includes for the first time desktop sized polymer AM equipment priced below EUR 10,000. This segment grew by over 30% recently while industrial equipment grew between 6-8% YoY.

The desktop segment is gaining importance as the use of lower cost systems expands beyond hobbyists and single machine set-ups into large scale industrial settings. Thus, the commonly used classification as Consumer or Prosumer is misleading. In recent years, print farms comprising several thousand of these desktop printers have been established to meet demand in Consumer Goods but also fulfill industrial demand and requirements. Industrial customers increasingly choose to invest in low-cost printers rather than typical industrial grade machines, which come at a multiple of the

investment cost yet offer limited additional benefit, if any for certain settings. In 2025, the revenue for desktop printers is nearly on par with industrial metal and polymer AM equipment combined and exhibits a tremendous growth trajectory of 30% annually. Startup BAMBU LAB, a standout in this space, entered a market considered saturated with hundreds of players just a few years ago. The company is now estimated to generate revenue exceeding EUR 1,000 million through sales of its products and services.

Global metal and polymer Additive Manufacturing equipment market 2020 to 2025 by investment classification [EUR billion]

- Desktop polymer AM equipment < EUR 10k
- Industrial polymer and metal AM equipment > EUR 10k



**AMPOWER**  
Source: additive-manufacturing-report.com  
© Copyright 2026, AMPOWER GmbH & Co. KG

## TABLE OF CONTENT OF THE FULL REPORT

# Table of content of the complete AMPOWER Report

### NEW IN 2026:

The AMPOWER Report 2026 for the first time analyzes the global desktop AM Equipment and Material market in the period from 2020 - 2025. This market includes polymer 3D Printers with Investment EUR <10,000

#### Market size

- Equipment Revenue
- Material Revenue
- Part Manufacturing Supplier
- User vs. Supplier forecast

#### Market by region

- USA
- Rest North America
- South America
- West Europe
- East Europe
- MENA
- Rest EMEA
- China
- East Asia
- South Asia
- Southeast Asia, Oceania

#### Market by Additive Manufacturing technology

- Metal PBF (LB/EB)
- LB/EB DED
- Arc DED
- Metal BJT
- Polymer PBF
- Polymer Filament ME
- Polymer Pellet ME
- Vat Polymerization
- Area-wise Vat Polymerization
- Material Jetting

#### Market by industry vertical

- Automotive, Motorsports, Trucks, Buses
- Civil Aviation, Turbines, Helicopters
- Defense
- Space

- Medical
- Dental
- Energy, Powerplants
- Oil and Gas
- Industrial
- Tooling, Molding
- High-tech
- Rail and Naval
- Part manufacturing suppliers
- Research Institutions
- Consumer Goods

#### Material market

- Aluminum alloys
- Stainless steel alloys
- Low alloy steels
- Tool steel alloys
- Nickel based alloys
- Titanium alloys
- Copper and bronze
- Cobalt alloys
- PA12
- PA11
- PA6
- TPU, TPE
- ULTEM, PEI
- PEEK, PEKK
- PPS, PPSU
- ABS
- PP
- PLA
- PET, PETG
- PC
- Photopolymer (Industrial)
- Photopolymer (Dental and Medical)

#### Investment analysis

- EV/NTM sales multiples
- Startup funding volumes
- Startups by vertical

#### Market pricing parts and materials

- Pricing PBF Stainless Steel
- Pricing PBF Aluminum
- Pricing PBF Titanium
- Pricing FDM ABS
- Pricing PBF PA12
- Pricing PBF TPU

#### Mentioned AM companies

- 3D SYSTEMS
- BLT
- CARBON 3D
- COLIBRIUM ADDITIVE
- DESKTOP METAL
- DMG MORI ADDITIVE
- EOS
- EPLUS3D
- FARSOON
- FORMLABS
- HBD
- HP
- MARKFORGED
- MATERIALISE
- NANO DIMENSION
- NIKON SLM SOLUTIONS
- PROTO LABS
- RENISHAW
- STRATASYS
- TRUMPF
- VELO3D
- XOMETRY

## General Additive Manufacturing developments and databases

- Technology maturity evaluation
- Investor's view
- Regional reports
- Regional R&D reports
- Global system supplier database
- Global service supplier database
- Global powder supplier database
- Global system database

Find the detailed table of content here:

<https://additive-manufacturing-report.com/>

# Insights Gained

---

The AMPOWER Report is the reference for the Additive Manufacturing industry. It provides a detailed view on the AM market and state of the AM technologies. The AMPOWER Report shows the current market and forecasts the developments expected in the next 5 years.

## Features & Benefits

- Including the global polymer and metal AM machines, materials and services
- Based on primary research data from over 300 personal interviews
- 22 Co-Authors cover specific AM markets
- Over 85 figures and graphs of AM market data
- Global system, service and powder supplier database with more than 4,000 entries
- PDF report available

## Leading AM companies trust AMPOWER



**SIEMENS**



GE Additive

**Nikon SLM**  
SOLUTIONS

Read the full report today:

<https://additive-manufacturing-report.com>

## About AMPOWER

**AMPOWER** is the leading strategy advisory and thought leader in the field of industrial Additive Manufacturing. The company advises investors, start-ups as well as suppliers and users of Additive Manufacturing technology in strategic decisions, due diligence investigations and provides unique access to market intelligence. On operational level,

AMPOWER supports the introduction of Additive Manufacturing through targeted training programs, support in qualification of internal and external machine capacity and technology benchmark studies. The company was founded in 2017 and is based in Hamburg, Germany, operating worldwide.

# About the authors

---



Dr. Maximilian Munsch

Maximilian is a professional user of Additive Manufacturing since 2007. After finishing his dissertation on reduction of residual stresses in metal Additive Manufacturing in 2012, he acquired extensive hands-on experience with different Powder Bed Fusion processes in regulated industry before co-founding AMPOWER in 2017. As Managing Partner at AMPOWER, Max focuses on data analysis, market intelligence and due diligence investigations.



Timo Führer

Timo joined the AMPOWER team in 2020. With a Master of science in the field of production technology and management he combines profound engineering know-how with an eye for economic correlations. In former affiliations he has been intensively involved in Additive Manufacturing and worked on numerous projects in research and consulting. At AMPOWER Timo is leading the market and technology analysis as well as consulting projects involving polymer based Additive Manufacturing..



Dr. Eric Wycisk

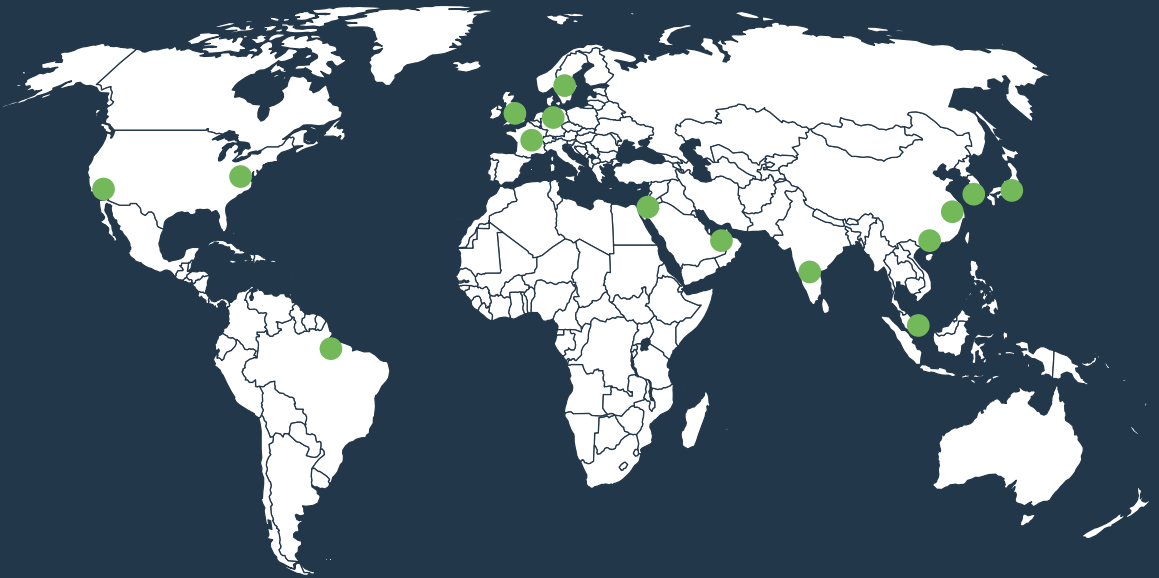
Since 2008 Eric successfully supports OEMs from aerospace, medical and automotive to identify Additive Manufacturing applications and implement production capacities in their regulated environments. With a background in topology optimization, titanium alloys and fatigue he is focused on achieving the maximum part performance with the right AM technology. As Managing Partner at AMPOWER, Eric focuses on technology evaluation and benchmarking, AM material and part properties as well as sustainability.



Matthias Schmidt-Lehr

Matthias successfully led multiple projects in Additive Manufacturing with focus on business case and strategic development for AM users as well as system and material supplier. With a history in management consulting, he has a wide experience in business development, strategy development and communication. At AMPOWER he led multiple projects concerning DED, BJT and Metal FDM as well as a wide range of polymer AM technologies.

# International Co-Authors



Nesma Aboulkhair



Alberto Andreu



Hao Bai



Martin Back



Bruno Bernard



Franc Coenen



Josh Dugdale



Arno Held



Dr. Dirk Herzog



Troy Jensen



Yathiraj Kasal



Michael Kenworthy



Rajeev Kulkarni



Dr. Lars Neumann



Hideaki Oba



Danny Piper



Gal Raz



Mahendran Reddy



Edvin Resebo



Fabio Sant'Ana



Kitty Wang



Yihan Zhong

## **LEGAL DISCLAIMER**

This white paper was created by AMPOWER GmbH & Co. KG

© AMPOWER GmbH & Co. KG. All rights reserved.

This document and all information contained herein are the property of AMPOWER GmbH & Co. KG. Content of this document shall not be reproduced or disclosed to a third party without distinct citation of its original author: AMPOWER GmbH & Co. KG.

No intellectual property rights are granted by the delivery of this document or the disclosure of its content. The content of this study is partially based on assumptions and public information. AMPOWER GmbH & Co. KG does not give an implied warranty regarding the projections or estimates.

No indication or statement in this study shall be understood as an assured prediction.

The reader should not act on any information provided in this study without receiving specific professional advice. The image rights remain with the respective originator at any time.

This document and its content shall not be used for any purpose other than that for which it is supplied. The statements made herein do not constitute an offer. AMPOWER GmbH & Co. KG shall not be liable for any damages resulting from the use of information contained in this study.



**Read the full report today:**

<https://additive-manufacturing-report.com>

AMPOWER GmbH & Co. KG  
Alstertor 13  
20095 Hamburg  
Germany

+49 (0) 40 99999 578  
[report@ampower.eu](mailto:report@ampower.eu)

[www.ampower.eu](http://www.ampower.eu)