AM EUROPE

Operated by CECIMO

MANIFESTO FOR A COMPETITIVE EUROPEAN ADDITIVE MANUFACTURING SECTOR

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What is Additive Manufacturing and why does it matter for the EU?

Additive Additive manufacturing (AM) has emerged as a key enabling technology over the last decade, fundamentally transforming manufacturing across a wide range of industries, including medical, aerospace, defense, tooling, automotive, mobility, energy, consumer goods, electronics, semiconductors, infrastructure, chemicals, and pharmaceuticals.

AM allows for the production of more complex, customised, and efficient products while using approximately 50% less material. It enables on-demand spare parts, improves casting and injection molding processes, supports the hydrogen energy transition, and strengthens supply chain resilience through localized production.

The EU has taken steps to promote AM through its research and innovation funding. However, overcoming barriers to widespread AM adoption will require sustained investment, stronger collaboration, and cohesive policy support at both the EU and member state levels.

What are the challenges?

- **Growing international competition:** While Europe continues to be a major player in the global AM market, competitors from North America and Asia are also making significant strides, supported by national policy strategy and larger share of public and private investments.

- **Paradigm shift in product development and limited understanding about the technology:** Adopting AM technologies entail changes in how a product is designed and realised. Such changes still need to be fully understood by different industries. This lack of understanding has led to a reluctance at the decision-making level, impeding the widespread growth and effective deployment of AM technology.

- **Finding qualified personnel:** Qualified and experienced personnel (from designers and mechanics to engineers) are not available in the numbers needed on the market.

- **Technical barriers:** Some areas of AM technologies and applications need further research (e.g. consistency of part quality, post-processing, advanced materials development) in order to become a competitive solution for more industrial ecosystems.

How does AM contribute to the achievement of EU objectives?

1. **Green transition and sustainable manufacturing:** AM plays a key role in the green transition. It enables the production of complex, lightweight parts that reduce overall weight without compromising strength, leading to lower fuel consumption and more efficient material use. AM also supports on-demand, localized production, reducing transportation needs and the associated carbon emissions. Furthermore, AM's ability to facilitate product repair helps conserve resources, extend product lifecycles, and promote a more sustainable manufacturing ecosystem.

2. **Industrial digital transformation and Industry 4.0:** AM is an integral part of the digital transformation and the concept of Industry 4.0. It relies on digital design files and computer-controlled processes and can be integrated with other strategic technologies such as artificial intelligence, robotics, and IoT devices to achieve a higher level of precision, repeatability, efficiency and speed. By adopting AM, the EU can further drive the digitalisation of its manufacturing sector, fostering connectivity, automation, and data-driven decision-making.

3. **Re-shoring:** AM enables localised production, which can contribute to the re-shoring of manufacturing activities. By adopting AM technologies, companies' production facilities are closer to their target markets. This localisation allows for faster response times and greater control over the production process.

4. **Reduce international dependencies:** AM can increase companies' resilience and autonomy over their production processes. By leveraging AM technologies, companies can have more control and freedom over the entire manufacturing cycle, from design to production. This autonomy allows for greater flexibility, customisation, and responsiveness to changing market demands and reducing the reliance on overseas suppliers and mitigating the risks associated with long and complex supply chains.

5. **Advanced material:** AM opens up new avenues for materials innovation by enabling the construction of intricate, customised components layer by layer. It facilitates experimentation and integration of materials that were previously difficult to work with, advancing applications such as super-strong aerospace alloys, high-performance polymers, biocompatible materials for medical use, and smart materials embedded with sensors and actuators.

Our vision for the European Additive Manufacturing sector

"Establish the EU as a global powerhouse for additive manufacturing (AM) and create an AM industry ecosystem that drives the development and deployment of cutting-edge technologies as well as contributes to the green and digital transition in EU."

Strategic recommendations for advancing additive manufacturing in the EU

To realise our vision of establishing the EU as a global powerhouse for additive manufacturing, we propose the following strategic recommendations:

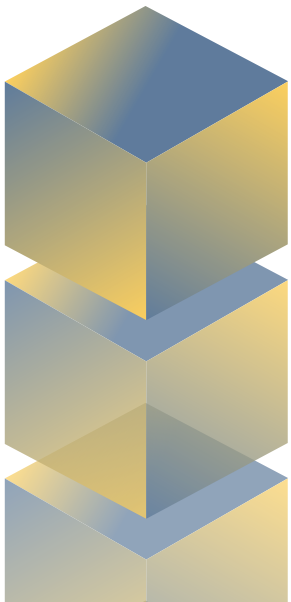
- **Launch a comprehensive European Additive Manufacturing strategy:** To strengthen the EU's leadership in AM, we propose the development and implementation of a robust AM strategy, which should aim to assess the status of the AM sector in the EU (identifying strengths and weaknesses) and detail actions to keep this sector competitive. Such a strategy should follow the model of the Coordinated Plan on Artificial Intelligence launched by the EU in 2018 and updated in 2021.

- **Support the growth of a European Additive Manufacturing ecosystem:** To accelerate the adoption and advancement of AM technologies across Europe, we recommend establishing a dedicated European AM entity through a robust public-private partnership to overcome barriers in AM. This partnership would facilitate the adoption of AM technologies and serve as a one-stop shop for information related to policy, standardisation, market uptake, and research, development and innovation (R&D&I) on AM.

- **Maximise the impact of public investments at both the EU and national levels:** Over the past decade, both the EU and its Member States have made significant investments in AM funding a wide range of solutions, research outputs, and development activities. Leveraging these existing resources, such as the AM Motion roadmap, in future R&D&I programs could help the EU avoid duplicating efforts and focus investments on new projects.

- **Include AM among the industry critical for emergency response capabilities**: Invest in AM to enhance emergency response capabilities, ensuring rapid production of critical components during crises. By establishing a network of AM facilities across Member States, the EU can, in different cases, leverage AM to address supply chain disruptions and produce essential parts on demand, thereby reducing dependence on external suppliers. This can help boosting industrial resilience and competitiveness and ensure that critical infrastructure and healthcare systems remain operational during emergencies.

- **Empower the workforce for the uptake of Additive Manufacturing:** Implement initiatives to support the development of an AM workforce in line with the findings of EU-funded projects such as SAM (Sector Skills Strategy in Additive Manufacturing). This effort will ensure a skilled workforce capable of driving AM innovation and responding effectively to industry needs.



MANIFESTO SIGNING PARTNERS

Europe: CECIMO
European Association of Manufacturing Technologies

Portugal: AIMMAP
Associacão dos Industriais Metalúrgicos, Metalomecãnicos e Afins de Portugal

Austria: Metaltechnology
Fachverband Metalltechnische Industrie

Spain: ADDIMAT
Additive & 3D Manufacturing Technologies Association

France: Evolis
Organisation professionnelle des biens d'équipement

Switzerland: SWISSMEM
Die Schweizer Maschinen-, Elektro- und Metall- Industrie

Germany: VDMA
Verband Deutscher Maschinen- und Anlagenbau

Türkiye: MIB
Makina Imalatcilari Birligi

Italy: UCIMU
Associazione dei costruttori Italiani di macchine utensili robot e automazione

UK: Additive Manufacturing UK (AMUK)
Additive Manufacturing Association

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About CECIMO:

CECIMO is the European Association of Manufacturing Technologies. With a primary focus on machine tools and additive manufacturing technologies, we bring together 15 national associations representing approximately 1500 industrial enterprises in Europe (EU + UK+ EFTA + Türkiye), over 80% of which are SMEs. CECIMO covers 97% of the total machine tool production in Europe and about 1/3worldwide. It accounts for approximately 150,000 employees and a turnover of around 25.8 billion euros in 2024.