

Ultimaker

3D Printing Sentiment Index: USA & UK lead as most advanced countries in 3D printing

Inaugural research commissioned by Ultimaker shows positive growth potential for 3D printing on global scale

Frankfurt, Germany – November 19, 2019 – [Ultimaker](#), the global leader in desktop 3D printing, today released its first annual 3D Printing Sentiment Index. Independent research conducted by [Savanta](#), an international research firm, details a comprehensive view of the current and future potential for 3D printing in 12 countries worldwide, while covering the widest range of verticals and professions, including education. The quantified index reveals the USA, UK, and Germany have the highest overall index score and therefore the greatest expectations for implementing additive manufacturing and capitalizing on its opportunities.

1	USA	7	Mexico
2	UK	8	Switzerland
3	Germany	9	Italy
4	France	10	Netherlands
5	China	11	Spain
6	Japan	12	India

The index is a measure of market awareness and adoption; adoption levels over time; as well as overall sentiment towards the potential impact of the technology. It is based on 2,548 interviews with qualified professionals and in-depth analysis of macro-economic factors. Five key elements were

investigated: market awareness, adoption and install base, 3D printing growth indicators, perceived future impact and optimism, and technology infrastructure and ease of adoption. Overall, 67 percent of respondents are currently aware of the terms '3D printing' and 'additive manufacturing'. However, only 35 percent have adopted the technology. Two thirds – 65 percent – think that 3D printing will revolutionize their industry and nearly 40 percent say that 3D printing will bring significant operational efficiencies and cost savings to their businesses over the coming 12 months, indicating the market's rapid evolution.

Market awareness of 3D printing or additive manufacturing

The survey shows that the Netherlands (83%), Switzerland (82%), and the USA (77%) have the highest levels of awareness. The Netherlands, home to several 3D printing companies, is often considered a leader in technology. Switzerland has strong growth in both the manufacturing and research fields – industries where 3D printing has a high innovation and adoption rate.

Level of adoption of 3D printing technology

By investigating the number of businesses that have adopted 3D printing and used the technology for more than 5 years, the survey determines the current maturity level across various countries. In China, 53 percent of businesses have adopted 3D printing and 11 percent have used it for more than

five years, followed by the USA (34 percent adoption and 19 percent have 5+ years of usage) and France (42 percent adoption and 8 percent have 5+ years of usage). This is significantly higher than the global average.

Sentiment levels towards 3D printing

The survey highlighted that, while the UK is largely on par with the rest of the leading countries in terms of awareness and adoption levels, British respondents demonstrated a measurably higher positive perception of the technology. 87% believe that 3D printing can offer extensive benefits in bringing new concepts and design ideas to life; 77% agree that 3D printing offers a much more effective way of making jigs, tools and fixtures than traditional methods; and 74% that 3D printing is the most efficient way to produce small batches of products and components.

Current 3D printing budget and plan to increase investment in the future

When the 67 percent of respondents who are aware of the technology were asked about their current and future 3D printing budgets, China, India, and the Netherlands came top with the highest current budget and future investment plans over the next 12 months. Wang Peng, Secretary-General of the Additive Manufacturing Alliance of China shared with [The Telegraph](#) that: "3D printing is entering a golden period in China. After years of development, it has turned from an innovative concept to something quite helpful in upgrading manufacturing plants." With current install bases being low in India and Netherlands, an increase in investment is inevitable driven by the positive sentiments.

"Sentiments are the start of a domino effect," says Rohit Jhamb, Director Global Research & Analytics at Ultimaker. "Positive sentiments lead to positive behaviour and investments, resulting in a future of significant and sustainable growth. This research is the widest and most in-depth in terms of coverage that combines end customer voice with macro-economic indicators. It therefore offers a complete view of the current ecosystem and future growth potential for 3D printing and shows that we have moved past the hype often associated with 3D printing. For potential stakeholders who haven't embraced the additive manufacturing market and are hesitant about entering, this Index shows they should be unafraid to contribute and can expect a healthy return on that contribution."

"Being close to end-customers is something we always highly value," says Jos Burger, CEO at Ultimaker. "These findings confirm our current strategy for delivering easy-to-use, reliable solutions that anyone can leverage to gain a fast ROI with 3D printing. In that sense, Ultimaker is uniquely positioned, since we provide the market with an open ecosystem of hardware, software and materials. By delivering a complete solution that seamlessly integrates with existing workflows, we are on track to facilitate this positive future growth potential and continue to be the driving force to achieve true digital distribution and local manufacturing."

Methodology

Savanta Group, independent market research consultancy, conducted this research on behalf of Ultimaker between August 1st to September 30th, 2019 across three key regions – Europe, APAC, and North America. In total, 2,548 skilled professionals across a range of key verticals and professions received the survey, of which 1,632 completed it. The study was administered online and fielded in 12 different countries in 8 languages. The respondents are working full time or part time and aged between 18 and 64 years old. The survey targeted professionals working in education, automotive and aerospace, manufacturing, architecture and construction, consumer goods, healthcare and medical technology, entertainment and the creative industry. Respondents were invited to take part via email and were provided with loyalty points as part of Savanta's scheme for qualified members who take part in multiple surveys. More country-level details on material use and

key applications can be found here: <https://3d.ultimaker.com/Ultimaker-3D-Printing-Sentiment-Index>.

About Ultimaker

Since 2011, Ultimaker has built an open and easy-to-use solution of 3D printers, software and materials that enable professional designers and engineers to innovate every day.

Today, Ultimaker is the market leader in desktop 3D printing. From offices in the Netherlands, New York, Boston, and Singapore – plus production facilities in Europa and the US – its global team of over 400 employees work together to accelerate the world's transition to digital distribution and local manufacturing. ultimaker.com