

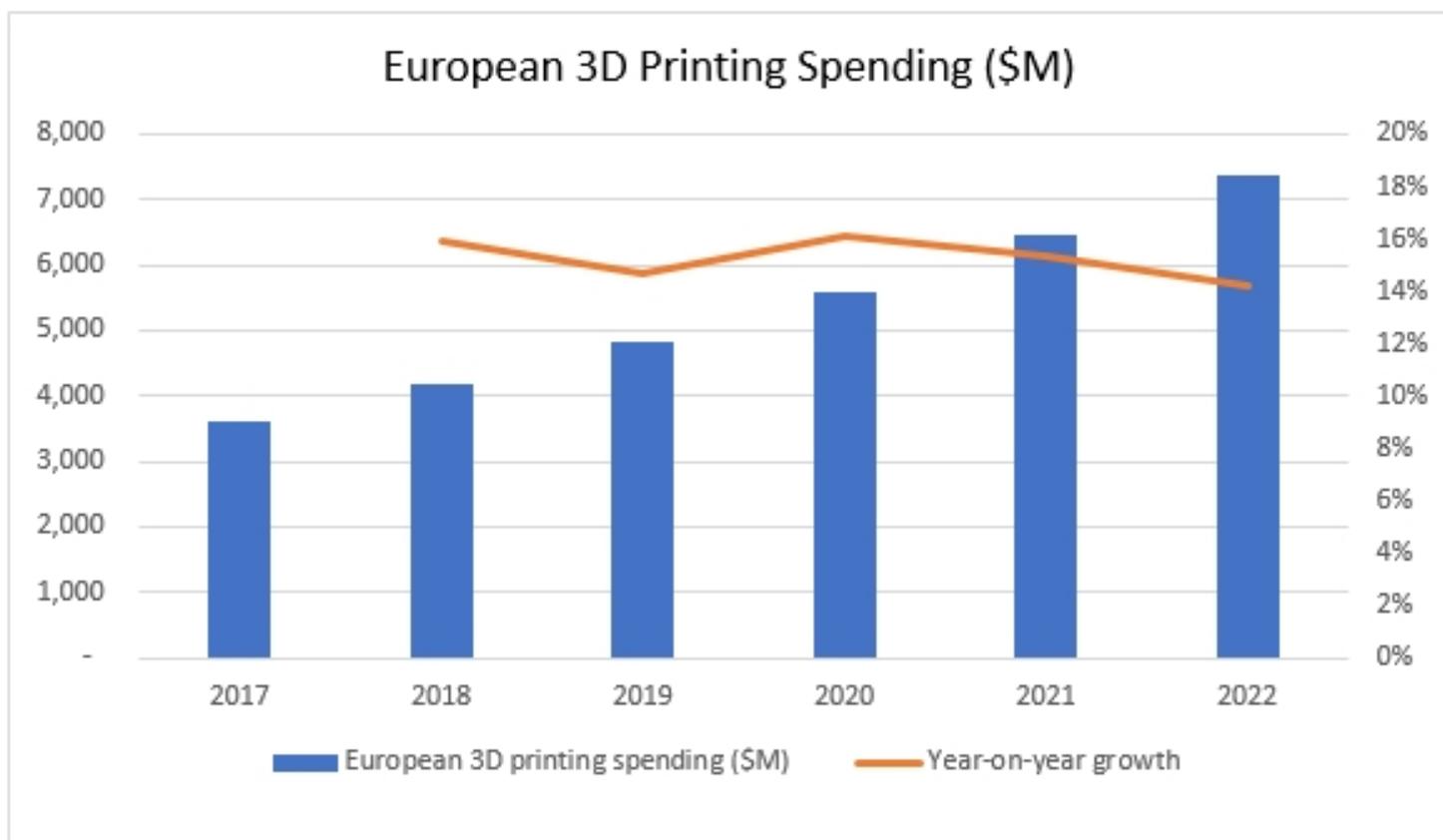
## IDC: W. European 3D Printing on the Rise

Written by Marco Attard  
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European sales of 3D printers, materials, software and related services total \$3.6 billion in 2017, IDC reports-- and are set to increase at a CAGR of 15.3% to reach \$7.4bn in 2022.

"3D printing has the potential to expand the manufacturing industry, shift distribution locally, and implement on-demand production, reducing unnecessary inventories and shipping costs," the analyst says. "It will enable mass customisation and printing of different products while reducing costs and recycling excess printer powder. Product weight can also be reduced, and fewer tools will be needed because 3D printers can replace some of them."



W. Europe holds 83% of 2017 European 3D printing revenues, and will remain the largest contributor across the region, growing at a CAGR of 14.4% for 2017-2022. On the other hand CEE is the fastest-growing region, with a CAGR of 19.1% for the forecast period. Either way the European market is showing "good momentum," and 2018 should prove to be a turning point.

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Hardware generated the largest spending in 2017, but materials should drive associated spending with a CAGR of 20% in the forecast period, exceeding the hardware component. Services remain a key part of the market, since consultation and system integration services are a critical component of 3D printing solution deployment.

In terms of verticals, discrete manufacturing accounts for over 50% of total European spending in 2017, and should remain the largest investor by industry with a CAGR of 14.5% for 2017-2022. Within the segment, the automotive and aerospace subindustries are the biggest contributors (and most mature subindustries), while the medical sector is set to develop further with a 19.5% CAGR for the forecast period.

Other verticals, such as healthcare and professional services, already use 3D spending with spending at over 10% of the total market. Healthcare providers are set to see a CAGR of 20.9% from 2017 to 2022, as organisations adopt internally and develop skills and capabilities around 3D printing.

The European 3D printing use cases with most 2017 revenues are prototypes (\$755m), aftermarket parts (\$522m) and architectural designs/models (\$353m). Prototypes and aftermarket parts should remain the top 2 use in 2022, followed by dental objects and medical support objects. Over the forecast period, the fastest-growing use cases will be tissue/organ/bone, dental objects and specialty food, with CAGRs over 20%.

IDC adds over 17% of W. European organisations taking part in the latest European Vertical Market Survey are adopting or plan to adopt 3D printing in 2018. The technology is also gaining popularity in CEE, with many startups taking advantage of EU funding to specialise in 3D printing services.

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