



Global 3D Printer Market Up +35% in 2015 on the back of B2B Purchases of Personal/Desktop Printers

Taiwan's XYZprinting leads the Desktop/Personal 3D Printer market in units while Stratasys leads in the Industrial/Professional sector in units and revenues

London, 4th January 2016 - Worldwide shipments of 3D Printers rose +35% year-to-date (YTD) through the first three quarters of 2015 on the back of shipments of low priced Personal/Desktop 3D Printers, according to figures released today by CONTEXT, the IT market research company. Of the total 173,962 units shipped year-to-date, 95% of these were Personal/Desktop printers, mostly priced below \$5,000. This represents a 38% YEAR-ON-YEAR growth for this sub-category compared to a decline in shipments of -3% YTD in the Industrial/Professional segment which saw only 8,706 units shipped through the first three quarters of 2015. Most of the growth came in the first half of the year however, with Q3'15 showing only a 4% YEAR-ON-YEAR growth in Personal/Desktop printer shipments and the Industrial/Professional sector struggling again, down -7% from Q3'14.

Taiwan's **XYZprinting** is the global leader in the Desktop/Personal 3D Printer space so far in 2015, with a 17% global share, taking the top spot from previous leader at the same time last year, **MakerBot**. The market continues to be characterized by regional brand dominance and the ability of start-ups to gain share quickly via various crowdsourced efforts. The influence of start-ups is evidenced by the progress of US based **M3D** and its highly successful Kickstarter effort showing strong demand remaining in this segment. Meanwhile, the recent announcement from 3D Systems of its refocus away from its \$999 consumer-focused printer gives further indication that demand in the Desktop/Personal segment is not coming from at-home consumers.

"While not quite yet resonating with general consumers, Desktop 3D Printers remain an important gateway technology for the evolution of the 3D Printing industry" noted Chris Connery, VP for Global Analysis at CONTEXT. "Today's young engineers, students, and hobbyists need to become exposed to the concepts necessary to allow them to properly design products for an additive manufacturing environment and low cost, entry level Personal 3D Printers allow for this learning to take place more rapidly."

Figure 1: Top 5 Vendor 3D Printer Market Share by Unit Volumes, Global Desktop/Personal Printers, YTD 2015 (Q1-Q3)

YTD 2015 Rank	Company	Brand	Units	Q1-Q3'15 YTD Global Share
1	XYZprinting	da Vinci	28,300	17%
2	3D Systems	Cube/Cubify	20,290	12%
3	Stratasys	MakerBot	15,426	9%
4	Ultimaker	Ultimaker	14,734	9%
5	M3D	The Micro	14,436	9%

The Industrial/Professional portion of the 3D Printing market struggled in 2015 after the hype from recent years faded. Additionally, IT industry stalwarts (previously not part of this industry) like **HP**, **Canon**, **Ricoh** and **Toshiba Machines** each announced plans to enter the market in the coming years, potentially slowing expensive capital investments in 3D Printers until these new technologies arrive.

The Industrial/Professional sector is characterized by a wide range of technologies and products which can range in price from \$20,000 to over \$1.5M. **Stratasys** and **3D Systems** are the most diversified in their portfolio of offerings and continued to lead the market in 2015. Germany based **EOS** showed the most growth in the year thanks its participation in the only sector in the Industrial/Professional space which prospered, Metal 3D Printing.

Figure 2: Top 5 Vendor 3D Printer Market Share by Unit Volumes, Global Industrial/Professional 3D Printers, YTD 2015 (Q1-Q3)

YTD 2015 Rank	Company	Units	Q1-Q3'15 YTD Global Share
1	Stratasys	4,308	49%
2	3D Systems	1,938	22%
3	envisionTEC	866	10%
4	EOS	326	4%
5	mCor	265	3%

As the industry evolves from typically only using 3D Printing as a Rapid Prototyping technology, to one which can now be used to make finished goods and parts, the addition of Metal 3D Printers to production floors took another step forward in 2015. While many of the 30-year-old Additive Manufacturing (AM) technologies were invented in and sold into the United States, the market for Industrial Metal 3D Printing machines is dominated by European companies such as **EOS**, **Concept Laser**, **SLM solutions**, **Arcam**, **Realizer** and **Renishaw** who account for 78% of total global sales. Machines in this category carry a weighted average list price of \$459,000. For this reason, the Industrial/Professional side of the 3D Printing market often benchmarks itself based on revenues generated from the sale of

machines, rather than in unit volume shipments alone, and on this measure companies with larger metal portfolios such as EOS, SLM Solutions and Arcam show their relevance as market leaders.

Figure 3: Top 5 Vendor 3D Printer Market by Revenue from Machines shipped, Global Industrial/Professional 3D Printers, YTD 2015 (Q1-Q3)

YTD 2015 Rank	Company	Revenues from Machines Sold (\$M)	Q1-Q3'15 YTD Global Share
1	Stratasys	\$ 333,783	40%
2	3D Systems	\$ 138,201	17%
3	EOS	\$ 137,530	17%
4	SLM Solutions	\$ 28,479	3%
5	Arcam	\$ 27,746	3%

The total global market for 3D Printing including not only printer Hardware, but also Materials and Services is projected to grow from \$4.3B in 2015 to \$17.7B by 2020. Growth is expected in both the Industrial/Professional sector especially in metals and in the Personal/Desktop sector especially in education. For the Personal/Desktop sector, as many companies recognize that general consumer adoption for these devices may be many years away, efforts in this space will be refocused toward engineers, architects, small businesses and educational institutions.

About CONTEXT

"Headquartered in London with approximately 250 staff across the world, CONTEXT specialises in tracking technology sales and pricing globally. Supported by the largest Distribution Channel Database in the world and coupled with our extensive experience in managing and reporting on large data sets, we provide the highest quality data that has been helping our clients make business-critical decisions for over 30 years. CONTEXT also works with Government Statistical Services and key Trade Associations globally."

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