

**An Overview of the Global AM Market:  
Disruptive Breakthrough or Evolutionary Growth?  
and  
Developing AM Business Opportunities Between Spain and  
Germany**

**GERMAN BUSINESS DELEGATION TRIP TO SPAIN**

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**Breuninger Management Consulting**

**18. May – 22. May 2026**

# Breuninger Management Consulting

University of Stuttgart: M.Sc. Chemical Engineering

INSEAD Fontainebleau: MBA Program

- Management consultant and passionate networker with more than 35 years of experience.
- Consultant to Stratasys for 5 years.
- Focus of consulting projects:  
Development of 3D printing strategies across the entire product life cycle.

## Vendor-independent 3D Printing Consulting

- Connecting 3D printing initiatives across the entire organization.

## Founder and member of various AM-networks

# **An Overview of the Global AM Market: Disruptive Breakthrough or Evolutionary Growth?**

## Global AM-Market:

Wohlers: 2025: 24.2 bn. \$ and 10.9% Growth

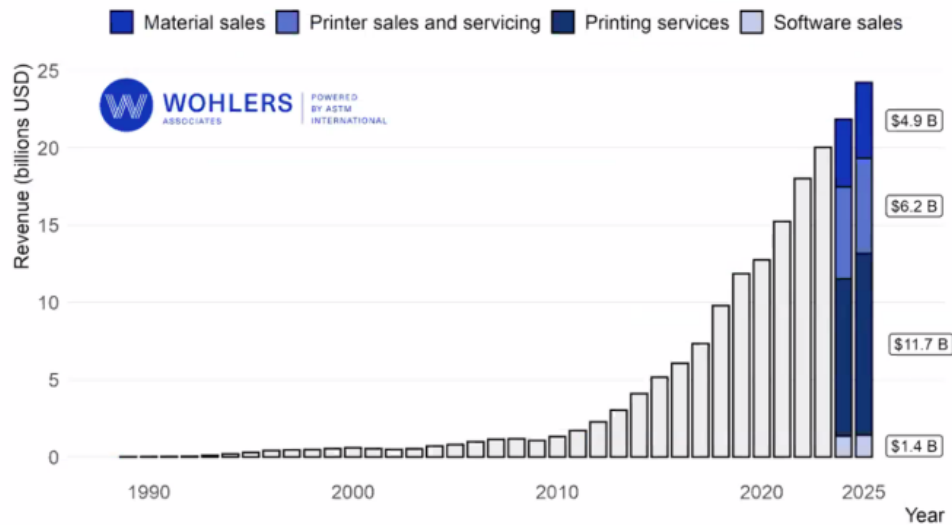
AM POWER: 11.33 bn €, and 5.6% Growth

For comparison: Nvidia generated: 39.3 bn. \$ revenue in Q4, 2025 alone.

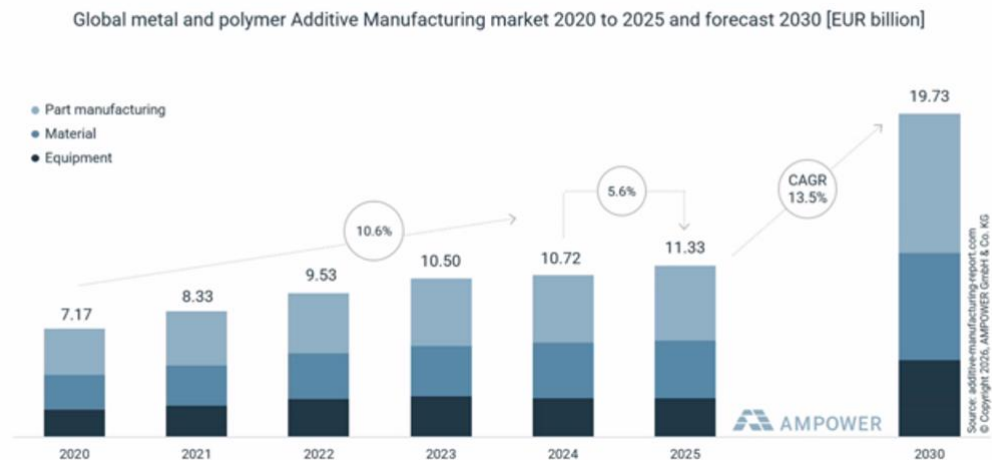
The market is growing evolutionarily; only specific applications are growing revolutionarily.

Share of 3D printing in global manufacturing: 0.01%.

AM Market in a restructuring phase.



## Global market development of industrial AM



# Facts of the Global AM Market:

**The fastest-growing AM market is China / APAC:**

**China / APAC:**

**2024: +30.95,**

**2025: +19.5%** (Source: Wohlers Ass.)

## **Reasons for Growth in APAC (primarily China)**

- Strong expansion in the entry-level printer market (Bambu Lab).
- Competitive Chinese pricing structures and feature sets in the high-end industrial market.
- China has traditionally used open material systems (while the USA and Europe were partly closed), leading to greater competition, a stronger focus on qualification, and improved part-processing quality.
- Shift in focus from pure hardware sales to applications, e.g. shoe soles. Strong domestic growth of the Chinese market.

# **Developing AM Business Opportunities Between Spain and Germany**

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## Approach (1/2):

- Which German AM-Market segments should be addressed?  
Parts, material, hardware or new business models?  
Examples for interesting parts:
  - Functional parts,
  - Industrial prototyping,
  - Small-batch manufacturing,
  - Spare parts
  - .....

# Developing AM Business Opportunities Between Spain and Germany

## Approach (2/2):



Provide a market overview of the relevant market segments of the German AM-Market.



Screening the most important networks, including their working groups for contacts.



Suggestions on which committees, industry bodies, and conferences should be approached to increase awareness and get contacts.



Establish contact to the desired companies and institutions to establish the business.

# We are happy to assist you!

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## Thank you for your attention.

