

## What are 3D printers?

3D printers are machines that use additive manufacturing processes to print three-dimensional objects from a digital file.

### Total Market

**2014**

158,000 units  
\$1.6 billion

**2018**

845,000 units  
\$4.8 billion

### Industrial

For highly customized, high-value elements or for prototyping

Used in automotive, aircraft, health care, dental and other

### Business Desktop and Consumer

Less costly machines for lower-value or lower-quality output

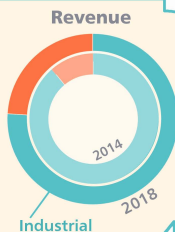
Used in fashion, art and food production, in schools, homes, small businesses, print shops and libraries

**30%**

The CAGR of industrial 3D printer unit sales between 2013 and 2018

**63%**

The CAGR of desktop and consumer 3D printer unit sales between 2013 and 2018



**2018**

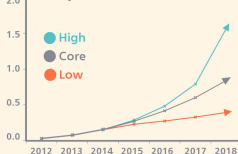
North America  
49% of the global revenue

EMEA  
23% of the global revenue

Asia and the rest of the world  
28% of the global revenue

### Scenarios

Shipments (million units)



**The high scenario assumes:**  
Clear need, frequent use, known brand names for consumer and desktop 3D printers

**The low scenario assumes:**  
Occasional use, slow price erosion and issues with intellectual property rights for consumer and desktop 3D printers