



Top Industrial/Professional 3D printer makers lose share in 2016

Shipments of Industrial/Professional printers down -10% for the year while those of Personal/Desktop printers increase by +34%

London, 12th April 2017 - Worldwide shipments of 3D printers rose +32% in 2016 thanks to increased shipments of Personal/Desktop printers. Over the year, the number of Industrial/Professional printers shipped globally fell by -10% while sales of Personal/Desktop printers* increased by 34%. Stratasys and XYZprinting again led their respective segments in terms of global market share according to figures released today by CONTEXT, the IT market research company.

Revenues generated from printer shipments were up in both segments but for vastly different reasons. The year-on-year increase of +8% in the Personal/Desktop segment was mostly due to higher volumes: the weighted average price dropped from \$1,302 in 2015 to \$1,052 in 2016 and fell to below \$500 for market leaders XYZprinting and Monoprice. In the Industrial/Professional segment, printer revenues were up 9% compared to last year thanks not to larger printer shipment volumes, but to higher ASPs driven by growing sales of metal-based additive manufacturing machines: over the year, taking in all technologies and materials, the total weighted average price rose +21% to \$119,129.

“Shipments of desktop 3D printers continue to rise even with the notion of ‘a 3D printer for every household’ no longer the single driving factor,” notes Chris Connery, vice-president of Global Market Research and Analysis, CONTEXT. “Marketers now realize that commercial and educational markets are driving the growth for these devices as much as hobbyists and consumers.”

Table 1: Top 5 Vendor 3D Printer Market Share by Unit Volumes and Printer Revenues, Global Personal/Desktop Printers 2016

2016 Rank by Units	Company	2016 Units	2016 Share by Units	2016 Rank by Unit Revenue	Company	2016 Revenue	2016 Share by Unit Revenue
1	XYZprinting	80,902	25%	1	Ultimaker	\$44.0M	13%
2	Monoprice	27,944	9%	2	XYZPrinting	\$39.7M	12%
3	Ultimaker	24,058	8%	3	Stratasys/MakerBot	\$38.9M	12%
4	M3D	21,656	7%	4	Formlabs	\$30.3M	9%
5	FlashForge	17,321	5%	5	Aleph Objects	\$17.7M	6%

On the Personal/Desktop side the year can be summarized as: (1) continued domination by XYZprinting, (2) the emergence of Monoprice as the #2 player, (3) demand from failed crowdfunding deliveries shifting elsewhere, (4) growing acceptance of machines as entry point into additive manufacturing and, (5) continued growth of sales into B2B and education.

Table 2: Top 5 Vendor 3D Printer Market by Revenue from Industrial/Professional Machines shipped 2016

2016 Rank	Company	Revenues from Machines Sold	2016 Global Revenue Share	Y/Y Change
1	Stratasys	\$ 427M	34%	-5%
2	EOS	\$ 210M	17%	15%
3	3D Systems	\$ 144M	11%	-19%
4	SLM Solutions	\$ 76M	6%	21%
5	Concept Laser	\$ 66M	5%	41%

The top 3 manufacturers continued to dominate the Industrial/Professional market, but collectively lost share due to a challenging year for Stratasys and 3D Systems. Of the top three players, EOS was the notable stand-out exception, thanks to its growing metals business. In 2016, this side of the market was marked by: (1) decreased sales from industry leaders Stratasys and 3D Systems, (2) acquisitions by GE and the formation of GE Additive, (3) the entrance of HP into the market with the shipment of their first Multi Jet Fusion printers, and (4) growing sales in stereolithography especially from long-time player EnvisionTEC and upstart Carbon.

“While the Industrial/Professional printer market has been historically characterised by its use for prototyping, any growth in this segment for the year came from printers used for ‘mass customization’ – such as for the dental industry – and from the sale of printers being used for complex, low-volume manufacturing such seen in the Metals space in the aerospace and medical industries,” noted Connery.

About CONTEXT

CONTEXT’s market intelligence, performance benchmarks and opportunity analysis empower clients to optimise operations and accelerate tomorrow’s revenues. With over 30 years of industry partnership and of experience reporting on large datasets, CONTEXT delivers analytics at all points in the value chain, providing clients with actionable insights rooted in concrete data and a profound understanding of customer needs. CONTEXT is headquartered in London, with over 250 staff across the world.

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* Personal/Desktop 3D Printers are generally defined as those selling at or below US\$5,000.