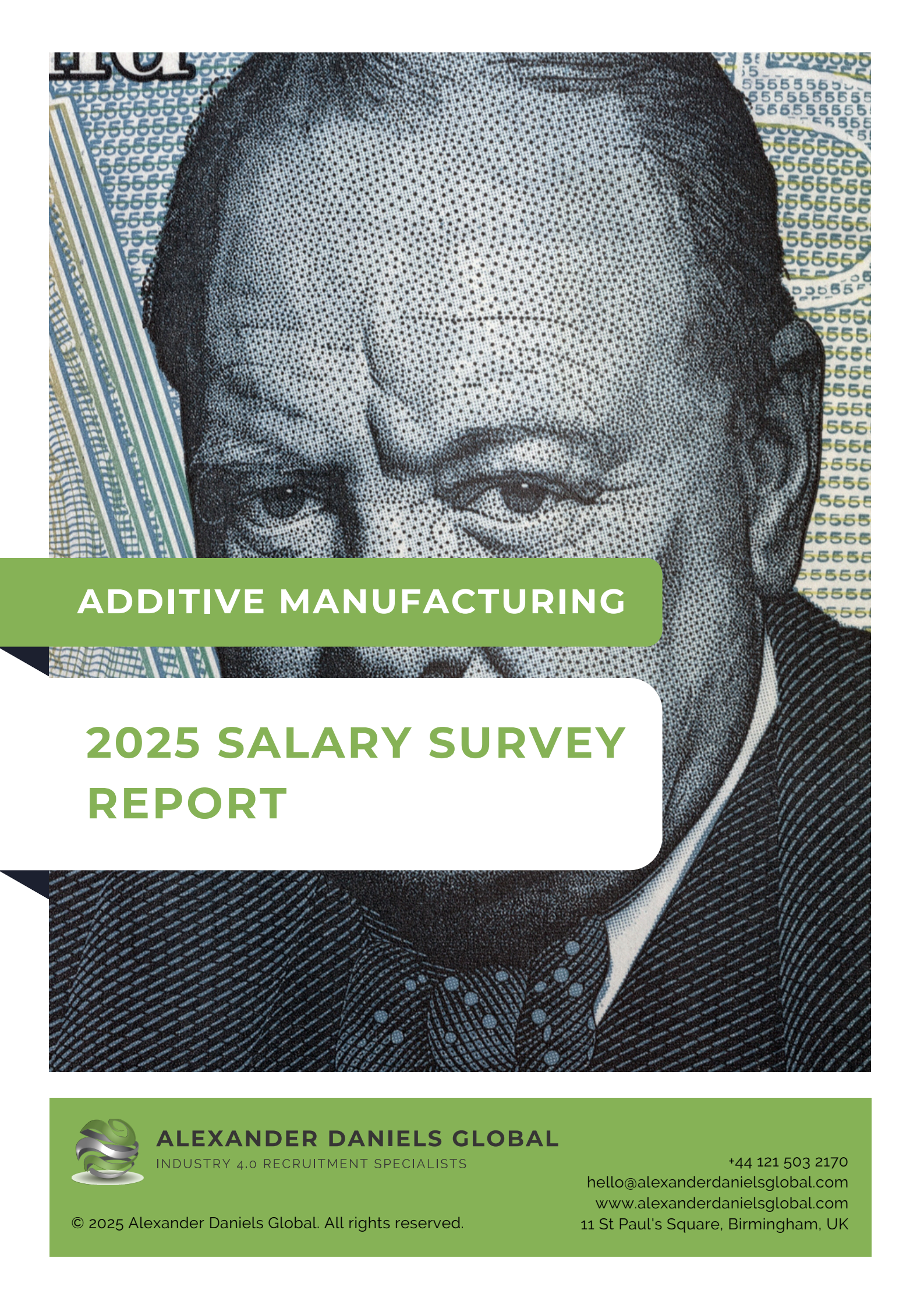




ADDITIVE MANUFACTURING

2025 SALARY SURVEY REPORT



ALEXANDER DANIELS GLOBAL

INDUSTRY 4.0 RECRUITMENT SPECIALISTS

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EXECUTIVE SUMMARY



If 2023 was a year categorised by the protracted takeover attempts and mergers between several of the industries leading players, 2024 was a year of action, at least for Nano Dimension. Nano announced their intention to acquire Desktop Metal in July and quickly followed that up with the news that MarkForged would follow in September. While both deals will not be completed until early 2025, this is a significant move by Nano, as it looks to become the market leading, multi-platform, AM business.

Nano have picked up both Desktop Metal and MarkForged for a snip of their previous valuations at between \$135m and \$183m for Desktop Metal and \$115m for MarkForged, not much more than 1x their revenue. If Nano can achieve the economies of scale that it hopes, they could become a profitable, powerhouse for the industry. This remains to be seen and achieved. It will not be easy to integrate, the already quite fragmented Desktop Metal businesses, and questions remain over what this will mean for the 600+ employees of the two companies?

The major hardware manufacturers have all struggled in 2024. At the time of writing this, Q2 revenue for Stratasys was down 13.6% [1], and 3D Systems revenue was down 11.7% [2], on the same period in 2023. This is a sentiment shared by most hardware manufacturers in the industry, listed or not. Growth in hardware sales has been negligible at best and for most companies they will have seen a reduction in sales. This is in part driven by challenging macroeconomic conditions, relatively high interest rates and, to a certain extent, decision making being

delayed in the US, until the election has been completed. These headwinds are not only being faced by the Additive Manufacturing industry. A recent Tech Crunch article highlighted a YoY decline in revenue for the first half of 2024 in Robotics of 6.8% [3].

The early signs of growth for Contract Manufacturers and Service Bureaus, that were highlighted in our report last year, have materialized. Major investments from Private Equity have buoyed this segment of the AM market and has been further supported by the growth in demand driven by defense projects. The latest report for Q2 2024 from

Growth in hardware sales has been negligible at best and for most companies they will have seen a reduction in sales.

AM Research [4] highlights a 12% YoY growth for Services, showing the continued progression in this area of the AM market.

In short, the market remains somewhat in flux; some areas of the market are up and performing reasonably well, and others are down. Taken as a whole though, the AM market remains somewhat flat, and this is reflected in the data we see for salaries. The overall demand for talent in 2024 has decreased significantly. The US & Canada saw a 14% reduction in hiring, with EMEA and APAC experiencing a 21% and 18% decrease respectively. The was also a sizeable

slowdown in the growth of the workforce in Additive Manufacturing. Unlike in previous years where the workforce has continued to grow at double digit rates of between 17% and 27%, 2024 saw no growth at all in APAC, and only 6% growth in EMEA. The US and Canada fared slightly better with an increase in the workforce of 13%. Nevertheless, while this reflects the anemic growth the industry is experiencing, it is concerning for the industry that new talent is not entering the market, especially if growth were to pick up in future years!

The overall demand for talent in 2024 has decreased significantly. The US & Canada saw a 14% reduction in hiring, with EMEA and APAC experiencing a 21% and 18% decrease respectively.

Lower demand for talent and tighter economic conditions should suggest a much leaner growth trajectory for salaries in 2024. However, high interest rates and spiraling costs of living were also major factors facing employees and employers over the past twelve months. While inflation is starting to fall, at its peak, some countries, including the UK, saw inflation as high as 11% in the past 12 months. Factoring that into the equation, in most cases, 'real salaries' adjusted for inflation, likely fell across the board in 2024. Our data shows that salaries in the US and Canada increased by 5.1% year on year, a marginally better increase than 2023 which was 3%. Having seen two years of declining average salaries, EMEA rebounded with growth of 6.5%. APAC continued a downward trend for the region, where salaries actually fell by 1.1%.

As is often the case, there are discrepancies between different disciplines and across the three regions. Globally Applications & Consulting roles saw the highest growth in salaries at 8.2%, with R&D and Engineering second at 6.6%. This reflects growing demand for talent that can help drive adoption of AM technology, where in the past, Sales was often the most sought-after, and therefore saw higher salary increases.

A notable new addition to the salary survey this year is data regarding Operators and Technicians. The demand for these profiles is, by a long way, the most sought after talent in the industry right now. It presents a major challenge for the machine OEMs and adopters alike. While machines continue to be sold, there is a severe shortage of skilled operators and technicians to run those machines. One of the areas of focus for Alexander Daniels Global in the past six months has been to try and address this

For the first time we have dedicated a segment in the report to salaries for Operators and Technicians as we look to shine a light on a critical area of demand for the industry.

imbalance and as a company we will be looking to work with companies and individuals alike to create a program to bridge this gap! For the first time we have dedicated a segment in the report to salaries for Operators and Technicians as we look to shine a light on a critical area of demand for the industry.

As we look ahead to 2025 and consider what we might expect to see in the AM industry, I am optimistic that a lot of the turbulence the industry has faced will be behind it.

There will undoubtedly be further consolidation on the hardware side. According to the AMPOWER REPORT 2024, there are roughly 400 metal and polymer machine OEMs, of which, roughly five in each segment account for about 50% of all revenue. As Matthias Schmidt-Lehr highlighted in a recent LinkedIn post [5], how many of the remaining 390 will survive the next five years?

2025 should continue to show strong signs of growth within the AM Services segment driven by demand from defense and further reshoring efforts being undertaken in the US. Space is another segment that continues to show the importance of AM as a viable production technology and with the recent success of SpaceX, returning a rocket to a stationary position from which it took off, this surely going to see further investment and therefore wider use of AM.

From a hiring perspective, I expect 2025 to be a challenging year for employers. Recent uncertainties have left candidates more wary about moving jobs. I expect demand for talent to pick up in 2025 compared to 2024, but with candidates more reluctant to change jobs, I expect it to become harder for companies to recruit, especially given that the growth of the workforce has slowed significantly. Companies could see that it takes longer to identify the right profile and generic job advertising will only serve to provide high numbers of unqualified applicants, which are time consuming to review.

Once again we are lucky to have secured insights from some of the foremost thought leaders in the AM market for this report. My heartfelt thanks go to Nirup Nagabandi and the team at Supernova, who are driving the industry forward with groundbreaking innovations, exemplified by their advanced Viscogels line of materials. I also extend my gratitude to Avi Reichental

Companies could see that it takes longer to identify the right profile and generic job advertising will only serve to provide high numbers of unqualified applicants

and the team at Nexa3D, whose unwavering commitment to integrating AI and IoT into additive manufacturing is shaping the future of the field. Their launch of Nexa AI in Q4 last year—a cutting-edge print intelligence software—underscores their dedication to optimizing the printing process and enhancing efficiency.

I am hugely grateful to our media partner 3dprint.com for their contribution and continued partnership. Finally I always like to say thank you to our team. Starting with Sophie Pontoppidan, without whom this report would not exist, and be no way near as insightful, detailed and well presented. Also our amazing recruitment team, who despite the challenging economic conditions facing AM and the wider global recruitment market, have made 2024 a record year for Alexander Daniels Global. Their hard work, passion for the industry and dedication to supporting our clients and candidates is what really sets us apart.

Finally I want to thank the many companies and individuals who take the time to complete the survey, without which this report would not be possible.

Yours Sincerely,



NICK PEARCE
Founder & Director
Alexander Daniels Global

INTRODUCTION TO THE SURVEY

Welcome! You are now reading the 2025 Global Additive Manufacturing Salary Survey provided by Alexander Daniels Global. This is our 9th year providing the additive manufacturing and 3D printing market with the most comprehensive salary study in the industry. Previous editions have received impressive feedback and have proved instrumental to understanding salary and hiring trends in the AM industry.

This report was created with the support of the AM industry and is based on survey responses from AM employers and AM professionals across different geographical locations and different stages of the AM value chain. This year, Alexander Daniels Global partnered with leading industry experts in various fields that helped to promote and widen the scope of the survey, and offered more context to the data within, whilst allowing us to shine a spotlight on the applications of AI and IoT technologies in the AM industry. A special thanks goes out to:



This report seeks to answer the burning questions both AM employers and professionals in the AM industry may have. It provides key insights into additive manufacturing specific trends, salary, hiring intentions, and in-demand skills and roles.

THE REPORT PROVIDES INFORMATION ACROSS:

- Seven key disciplines: R&D and Engineering, Sales, Service, Applications & Consulting, Marketing, Software and Machine Operators & Technicians;
- Remuneration at five levels of seniority; and
- Across three key regions: EMEA, APAC and North America.

EMPLOYER QUESTIONS ANSWERED BY THE REPORT:

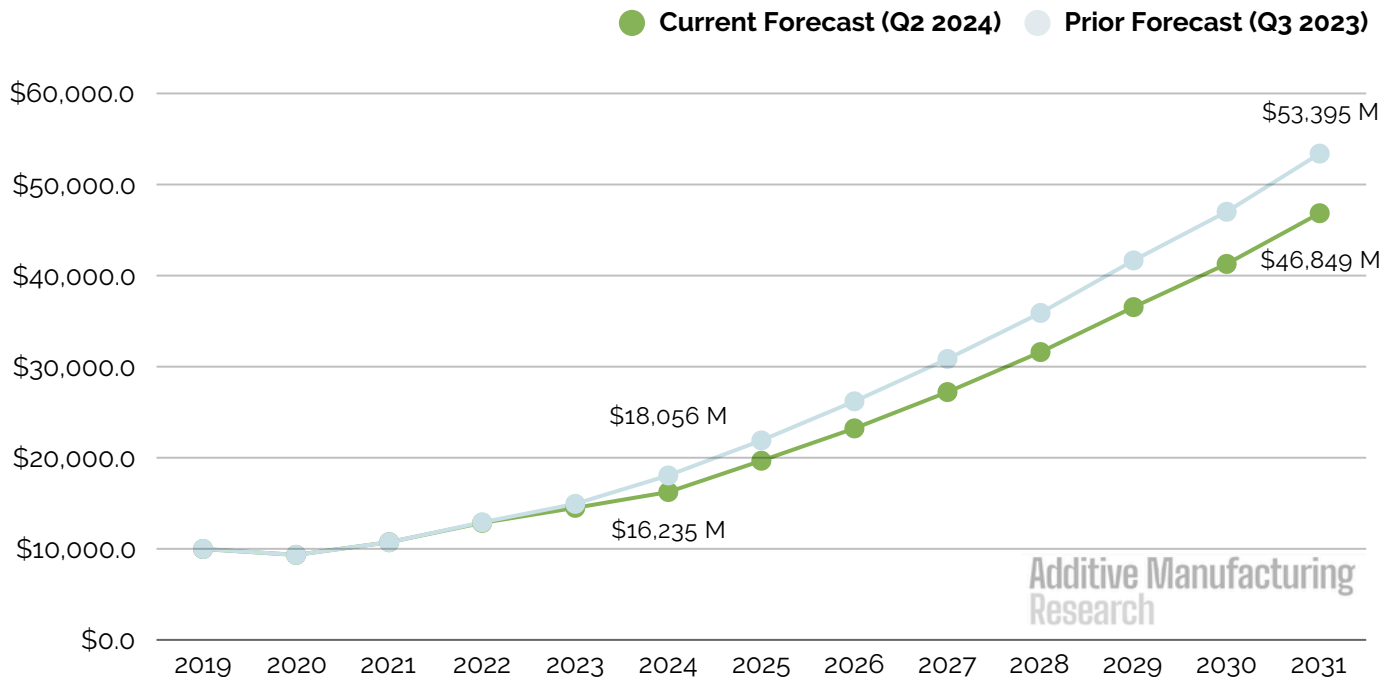
- Is the remuneration package offered by my company aligned with the AM industry standards?
- How do we attract 3D printing professionals from different disciplines to our organization?
- What is the staff budget that we need in order to expand our business to another country?
- What is the likely impact of market consolidation on hiring, innovation of new products and what do I need to be aware of when planning my people strategy?

AM PROFESSIONALS' QUESTIONS ANSWERED BY THE REPORT:

- What is the salary that professionals are receiving in my field in different regions?
- How will my salary increase with more experience in AM?
- Am I currently paid according to my market value?

MARKET OVERVIEW

Worldwide AM Market Revenue (\$US Millions)



MARKET PERFORMANCE: FALLING SHORT OF EXPECTATIONS

The graph above is from Additive Manufacturing Research (formerly SmarTech Analysis). It illustrates the actual and projected worldwide market revenue of the additive manufacturing industry in million US dollars.

According to data from AMR, the global additive manufacturing market is valued at approximately \$16.2 billion in 2024 - falling short for another year of the previously forecasted \$18BN. These updated valuations represent a 12.3% downward revision of the projected market value for 2030, underscoring the industry's ongoing challenges.

2024: A CHALLENGING YEAR FOR INDUSTRY GROWTH

The year 2024 has proven difficult for the additive manufacturing industry, with quarterly market valuations consistently underperforming against forecasts and a noticeable slowdown in headcount growth. The much-discussed "mergerpocalypse," a term coined by Michael Molitch-Hou in his contribution to the 2024 Salary Survey Report, didn't materialize as initially anticipated. However, Q3 saw a major shake-up with Nano Dimension acquiring Desktop Metal and subsequently tabling a bid to acquire Markforged. As all three companies consolidate operations in Massachusetts, significant cost-cutting and headcount reductions are likely over the next 12 months.

TECHNOLOGICAL SHIFTS AND TALENT GAPS

The past year's trade shows have highlighted a growing focus on integrating AI and IoT technologies into 3D printing workflows. These innovations promise to unlock new efficiencies and opportunities for businesses. We have, therefore, chosen to highlight these technologies in our Spotlight section later in the report.

On the talent front, the industry faces increasing challenges. Trade shows have also revealed a critical skills shortage, particularly for Machine Operators and Additive Manufacturing Technicians - roles we now refer to as the "new skilled trades." Employers are finding it increasingly difficult to attract and retain professionals in these areas, making these roles some of the most in-demand as we move into 2025. To address this issue, we've introduced these roles as a dedicated 7th discipline in this year's report.

INVESTMENT TRENDS: A SHIFT IN FOCUS

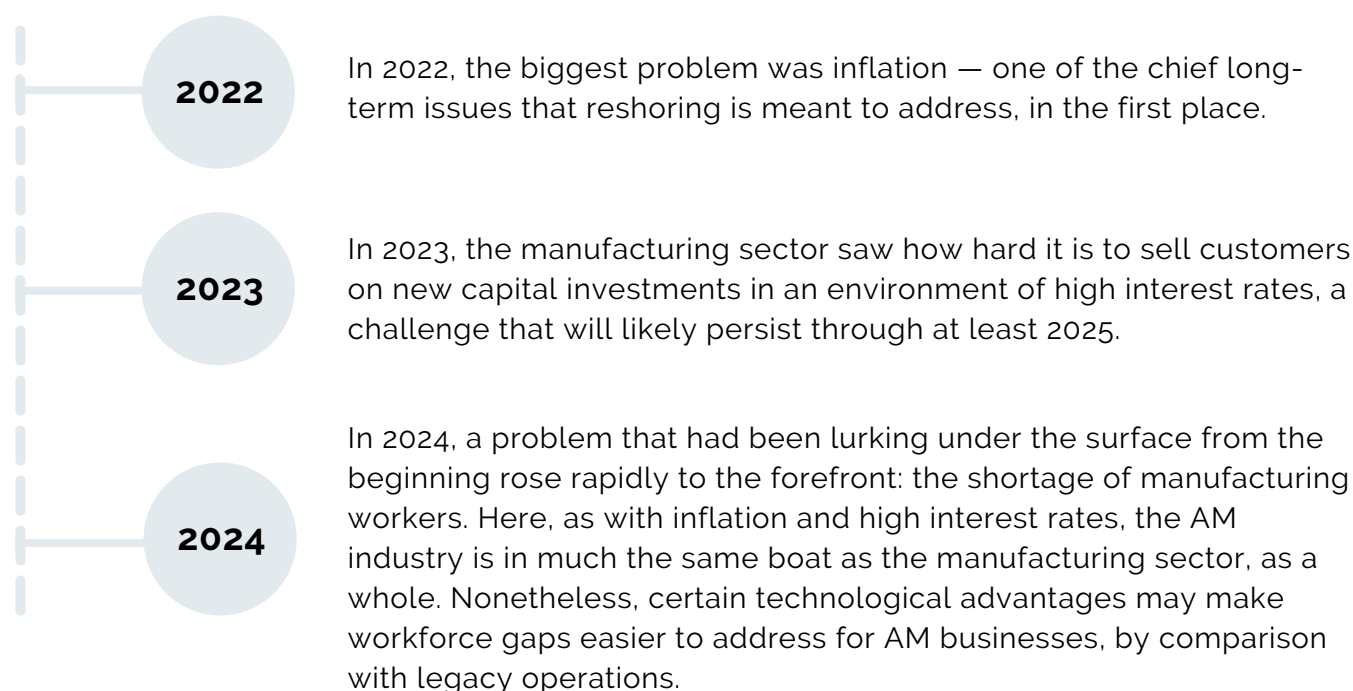
2024 has been a subdued year for investments in 3D printing technology. HZG made two notable investments in Craftcloud3D and Rapid Liquid Print, while AM Ventures focused on supporting existing portfolio companies, providing seed funding to Fortius Metals and assisting Conflux Technology in raising an \$11M Series B round. With valuations under pressure and capital flow constrained, venture funds are prioritizing the protection and growth of existing investments rather than pursuing new opportunities. As AI continues to capture the lion's share of investor attention, 3D printing appears to have lost some of its former allure.



MATT KREMENETSKY
Macro Analyst
3dprint.com

2024 IN REVIEW & WORKFORCE SHORTAGES

As Western nations continue to push forward in their reshoring efforts, increasingly harsh realities arise that reveal how truly difficult a task it is to rebuild industrial ecosystems.



Above all, many of the enterprises that deploy AM have been using a variety of emerging software innovations to do more with the same number of workers, allowing them to keep up with increasing demand for printed parts. Whether this is by using design automation software to speed up the engineering process, manufacturing execution systems to maintain quality control, or on-demand manufacturing services to reduce the lead time for parts on order, AM users are demonstrating that they're still well ahead of the broader manufacturing sector curve when it comes to digitization.

Going forward, the stakes involved in the buildup of new manufacturing activity — especially in those areas of the world committed to reshoring — will make it increasingly vital for the AM industry to maintain and indeed to accelerate that trajectory. A [Deloitte study](#) [7] released in Q2 2024 estimates that the US will need 3.8 million new manufacturing workers by 2033, and that about half of those jobs could go unfilled unless both private industry and the public sector take significant action.

A silver lining to this for the AM industry is that AM users are, again, ahead of the curve. In addition to the already-mentioned software solutions behind the AM industry's "learning by doing" approach to addressing workforce gaps, key AM innovators like the US Navy are creating comprehensive workforce development programs to attract new workers to the AM labor pool.

In its second year, the Navy's [Build Submarines](#) [8] program built on its momentum towards the objective of adding 100,000 submarine manufacturers to the defense industrial base over the next decade. Among other things, this included the new [Michigan Maritime Manufacturing \(M3\) Initiative](#), [9] a \$50 million investment

by the US Navy into a number of different workforce training institutions in the Midwestern state.

Meanwhile, AM companies also took the monumental task of rebuilding Western manufacturing ecosystems into their own hands. For instance, one of the world's leading AM OEM's, [EOS](#), opened the physical campus for its [Additive Minds Academy](#) in August 2024, at its North American headquarters in Novi, Michigan. By centralizing its workforce development efforts at that location, the company is hoping both to reduce the cost of training customers in its processes, while simultaneously accelerating the necessary timeline for getting new users up to speed.

Along those lines, it's worth mentioning that, at the beginning of 2024, the senior VP of Additive Minds, Dr. Gregory Hayes, noted that the employees that the AM industry needs most urgently are [certified machine operators](#) [10]. This aligned with ADG's own findings, which also suggested that the AM industry will likely need to increase salaries for those positions, in particular, in order to persuade new talent that would otherwise be more interested in working at legacy giants.

Thus, while there is clearly no easy fix to a generational challenge like building a new manufacturing workforce, the AM industry has at least recognized and started to define the task at hand, and has even started to cultivate a repertoire of promising tools with real potential for solving the problem. While this may just represent a beginning of the next chapter for AM, AM users' collective ability to innovate on the fly has put the industry on solid footing to build the future manufacturing labor pool in 2025 and beyond.

**Author: Matt Kremenetsky,
Macro Analyst, 3DPrint.com**

2024 PREDICTIONS FROM EXPERTS



NIRUP NAGABANDI

Supernova:

Chief Technology Officer



We are expanding the boundaries of manufacturing technologies and materials to support any factory in the world

Visit: <https://supernova3d.com/>



AM technology has been around since the early 1980s, but it began to gain significant traction in the 2000s, particularly with the rise of desktop 3D printers and advancements in material options. The 2010s marked a period of growth, and the 2020s continue to see advancements and broader industrial applications.

On the periphery, while the story of this growth seems to happen due to new technologies of machinery (processing equipment), the real drive behind this is the need to process a certain material. AM technologies, for all their growth and diversity offer somewhere about 200 unique materials across polymers, metals, composites and ceramic, which pales in contrast to more than 5000 unique materials across 150,000 grades possible via traditional manufacturing methods.

While design freedom and localization of supply chain is a component, this consideration comes into picture only when a material of choice is available. So, while the AM hype train has taken flight for the right reasons of localization, customization, design freedom, it is halted and pulled back by lack of fundamental reason, that is material choice.

For nearly a decade, the Additive Manufacturing industry has been at a crossroads, with immense potential yet to fully break into the mainstream. While 3D printing has shown promise in rapid prototyping, custom part production, and small-batch manufacturing, it continues to face a significant roadblock—material freedom. Compared to traditional manufacturing, which offers thousands of polymers and their respective grades for various applications, 3D printing is working with less than 1% of this vast library. This limitation drastically narrows the range of industries that can adopt AM for high-performance, large-scale applications.

Traditional manufacturing allows engineers and designers to select from a wide variety of materials tailored to specific needs—whether for high temperature, high strength, or chemical resistance. In contrast, AM technologies have been confined to a limited material set, restricting performance and

scalability. This gap in material availability is one of the key factors preventing 3D printing from transitioning into mainstream industrial use. Until we can offer a broader spectrum of materials with properties on par with traditional methods, AM will continue to be viewed as a niche technology.

At Supernova, we're tackling this challenge head-on with our proprietary Viscous Lithography Manufacturing (VLM) technology. VLM can process resins with viscosities up to 500,000 cps, allowing us to work with high solid loads and composite materials that are typically unfeasible in existing 3D printing platforms. This advancement is the key to unlocking material freedom in additive manufacturing. By enabling the use of materials that closely match the diversity and performance characteristics of those used in traditional manufacturing, we aim to push AM into the mainstream.

Supernova's technology is already proving its value in industries like defense and space exploration, where safety, precision, and material performance are critical. With the ability to process up to 90% solid loads in our 3D printing process, we offer design freedom, improved safety, and enhanced manufacturing agility. As we continue to innovate, we believe Supernova will play a pivotal role in helping AM reach its full potential—bringing material freedom to the forefront and enabling manufacturers to overcome the limitations that have held the technology back for so long.

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We are expanding the boundaries of manufacturing technologies and materials to support any factory in the world

Visit: <https://supernova3d.com/>

THE STATE OF THE TALENT AND HIRING MARKET

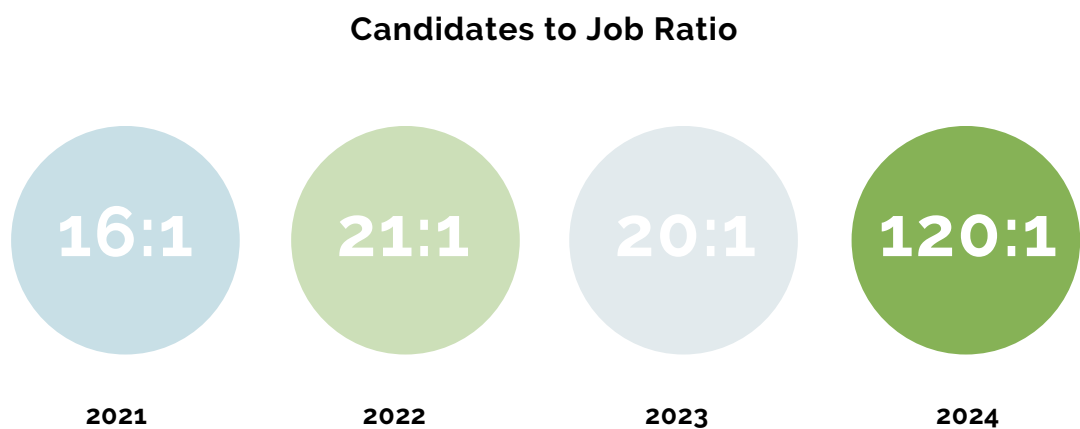
In 2024, the talent shortage in additive manufacturing is intensifying. The rapid growth of the AM industry has seen larger multinational companies, particularly in aerospace, automotive, and consumer electronics, enter the field with increasing force. These corporations, with their robust financial resources, can offer higher salaries, better benefits, and more appealing career paths compared to smaller AM firms. This shift is causing smaller and mid-sized companies to struggle in retaining and attracting talent for key technical roles.

The skills gap has become particularly acute for middle-skilled workers - those with specialized AM training but not necessarily a four-year degree. Positions such as machine operators and technicians are in high demand within the industry. However, AM employers are increasingly competing with other sectors that leverage AM technologies and offer more lucrative compensation packages for similar roles, intensifying the challenge of filling these particular positions.

Although educational programs and certifications in additive manufacturing are expanding, they have not yet kept pace with the industry's growth. Many AM companies are now relying on internal strategies such as upskilling and cross-training existing employees to fill these gaps. Partnerships with technical schools and apprenticeship programs are also becoming more common as companies seek to build talent pipelines. However, these efforts take time, and the immediate pressure to find skilled workers remains.

In this landscape, companies that can offer not only competitive salaries but also career development opportunities, flexible working arrangements, and clear pathways to advancement may have an advantage in retaining top talent.

As in previous years, Alexander Daniels Global has conducted research into the state of the AM talent and job market in 2024, analyzing the availability of talent against the increasing number of AM job openings. While the industry faces a shortage of experienced professionals, the growing focus on education and cross-disciplinary talent strategies holds promise for narrowing the gap and supporting the continued growth of the AM industry



As we go into 2025, there has been a significant shift in the talent and job market. The numbers this year indicate that for every 1 job, there are 120 AM professionals available to fill that job – globally. This is a stark indicator of the decline in job opportunities present in the AM market, that we will explore later in the report.

GROWTH IN # OF PROFESSIONALS ACROSS NORTH AMERICA, EUROPE & APAC

2024 has signaled a significant slowing in the growth of the AM talent market with the addition of new professionals to the industry reducing by 53.5% when compared with 2023. This equates to an injection of only approximately 40,000 professionals in 2024 as opposed to the 86,000 in 2023, across EMEA, North America and the APAC region.

of Total Professionals Working in Additive Manufacturing
vs. # of AM Professionals Open to New Jobs



In North America and Canada, we observed a notable 13% increase in new talent compared to the previous year. In contrast, Europe saw a more modest growth in its talent pool, with a 6% rise. Meanwhile, the APAC region showed stagnation in 2024, with no measurable increase in the workforce based on our data.

Looking ahead to 2025, a larger proportion of professionals are reportedly open to new job opportunities, with a 16% increase in talent self-reporting as 'Open to Work' throughout 2024. This trend is somewhat unexpected given the limited job openings we've seen this year. As a result, we anticipate an increasingly competitive job market for talent over the next 12 months.

SHIFTING OPPORTUNITIES AND A CHANGING TALENT LANDSCAPE

For the third consecutive year, the overall availability of jobs in additive manufacturing has steadily declined, with 2024 marking the most significant drop yet. Hiring has slowed across key regions, with a 14% decrease in EMEA and 21% in North America, while only APAC saw an 18% increase. This trend reflects economic pressures and shifting demands within the industry. Despite the contraction in job openings, the talent pool continues to grow, leading to a widening gap between the number of skilled professionals and the diminishing opportunities, particularly in regions experiencing slower hiring activity.

North America & Canada

Of the +270,000 additive manufacturing professionals in North America, 120,000 professionals consider themselves open to new opportunities, i.e. open to changing jobs. This is a 21% increase on the previous year. This increase in active talent, paired with a 14% reduction in open jobs to 984, results in a 122:1 candidate to job ratio.

That means, that for every job posting, there are 122 active candidates in the entirety of North America and Canada, that could potentially fill that job. That is an unprecedented high in the history of the salary survey report, and signals a tough job market for AM talent in 2025.

Professionals to Job Ratio - North America & Canada

	2022	2023	2024
Professionals Open to New Jobs	74,000	99,000	120,000
Jobs	4,948	1,140	984
Candidate to Job Ratio	15:1	87:1	122:1

EMEA

In EMEA, of the +180,000 AM professionals in additive manufacturing, 71,000 declared themselves open to new possibilities i.e., open to changing jobs. This is a 16% increase on the previous year, which is rendered noteworthy when taking into account the significant decrease in job opportunities in the European talent market (-21%) for the third year in a row.

This, paired with a total of 816 available jobs, leaves a candidate to job ratio of 87:1 – significantly higher than the already concerning ratio of 59:1 that we saw in 2023, indicating a struggling talent market in EMEA.

Professionals to Job Ratio - EMEA

	2022	2023	2024
Professionals Open to New Jobs	45,000	61,000	71,000
Jobs	1,925	1,032	816
Candidate to Job Ratio	24:1	59:1	87:1

Asia Pacific

In APAC, of the +110,000 AM professionals in additive manufacturing, 53,000 declared themselves open to new possibilities i.e., open to changing jobs. This is an 8% increase on the previous year, which is rendered noteworthy when taking into account that the talent market has not grown in this region throughout 2024.

This, paired with a mere total of 240 available jobs, leaves a candidate to job ratio of 220:1 – extraordinarily high, even while this region is the only one of the 3 to experience an increase in hiring of 18% throughout 2024 .

Professionals to Job Ratio - Asia Pacific

	2022	2023	2024
Professionals Open to New Jobs	35,000	49,000	53,000
Jobs	8,766	204	240
Candidate to Job Ratio	11:1	240:1	220:1

*These ratios are likely to be lower for each region, taking into account that the candidates must have specific experience in a field related to the job and have to be either in the same location as the job or be willing to relocate.



MARKET INSIGHT: IMPACT ON EMPLOYERS AND EMPLOYEES

As we approach 2025, the additive manufacturing industry faces a growing disparity between the expanding talent pool and the shrinking availability of job opportunities. The number of professionals entering the field has increased, particularly in regions like EMEA and North America, yet hiring rates have slowed across the board. This is largely due to economic pressures and competition from larger multinational corporations, which offer higher salaries and better benefits for skilled AM technicians and operators.

This competitive job landscape places both employers and job seekers in challenging positions. Companies may find it harder to retain top talent as larger firms offer more attractive packages, while candidates may need to lower their expectations or broaden their skillsets to stay competitive. The continued integration of AI, robotics, and digital technologies into manufacturing processes adds another layer of complexity, requiring AM professionals to adapt quickly to evolving industry demands.

The coming year is expected to remain challenging for both sides, as the industry navigates these changes amid broader economic uncertainties and technological advancements.

WHAT DOES THE TALENT MARKET LOOK LIKE?

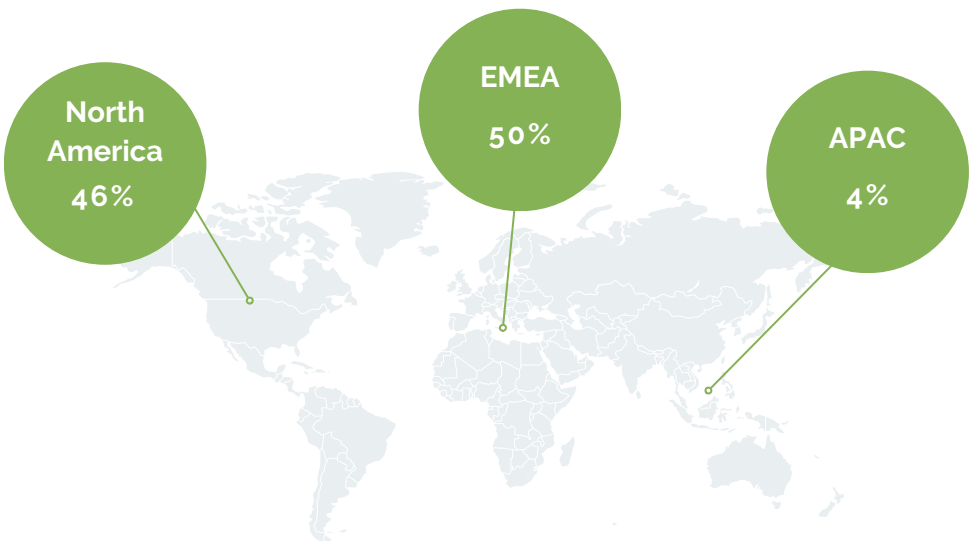
Understanding the talent market in additive manufacturing is crucial to understanding the salary benchmarks, job motivations, and talent demand from companies. The market is dynamic with an array of different type of professionals with often very varying backgrounds due to the broad nature of the industry. The following analysis and numbers are based on survey responses to the 2025 Additive Manufacturing Salary Survey from Alexander Daniels Global, coupled with further secondary data.

GENDER DISTRIBUTION OF PROFESSIONALS IN AM



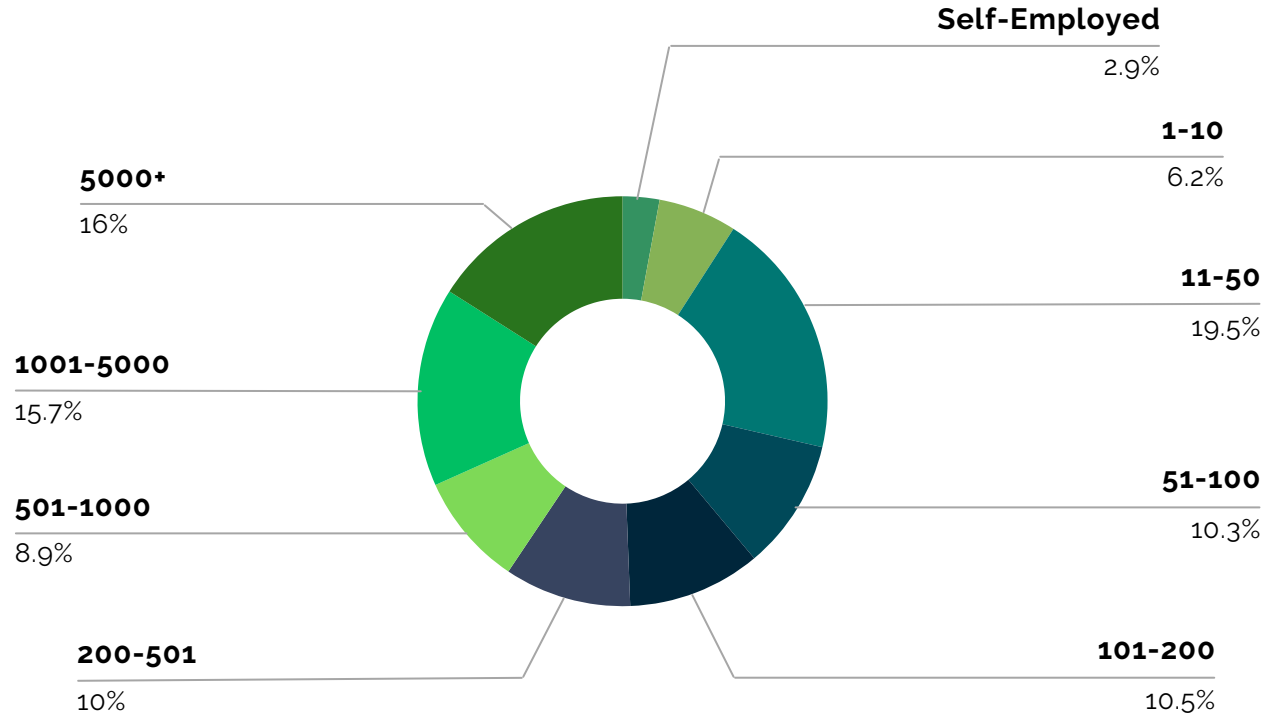
In the 2025 AM Salary Survey, women made up 13.1% of respondents, while men comprised 83.3%, and 3.6% chose not to disclose their gender. However, through additional research, we gained a more accurate understanding of gender representation within the additive manufacturing workforce. Globally, women now account for 23% of the workforce, with men representing 77%. This gender split is consistent across regions: in EMEA, women make up 22% of the workforce, with men at 78%, while both APAC and North America show a similar distribution of 23% women and 77% men. This data highlights the ongoing gender disparity in the industry, despite some progress in female representation in the AM workforce.

PARTICIPATION FROM 112 AM ORGANIZATIONS



The 2025 AM Salary Survey saw participation from more than 112 organizations in the AM industry, providing a wide spread of salary and sentiment data from a variety of businesses in the AM ecosystem for the 2025 report.

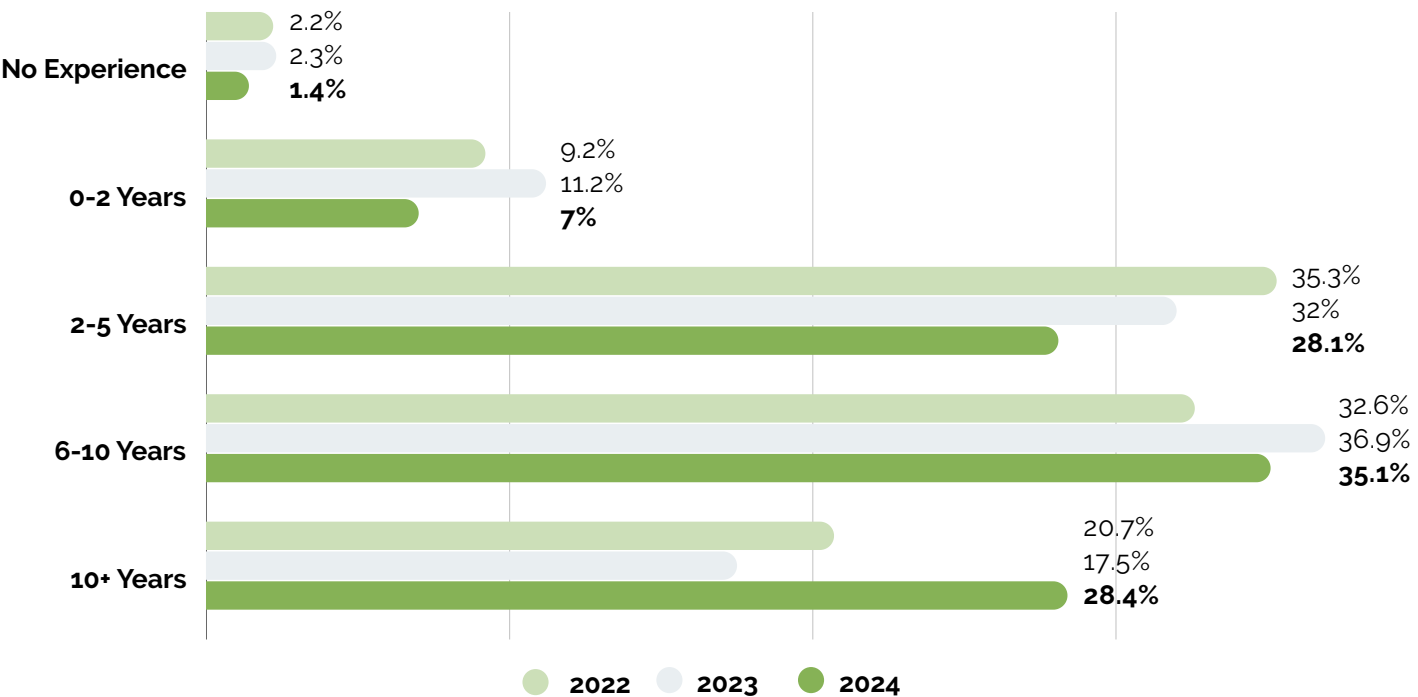
PROFESSIONAL RESPONDENTS BY COMPANY SIZE



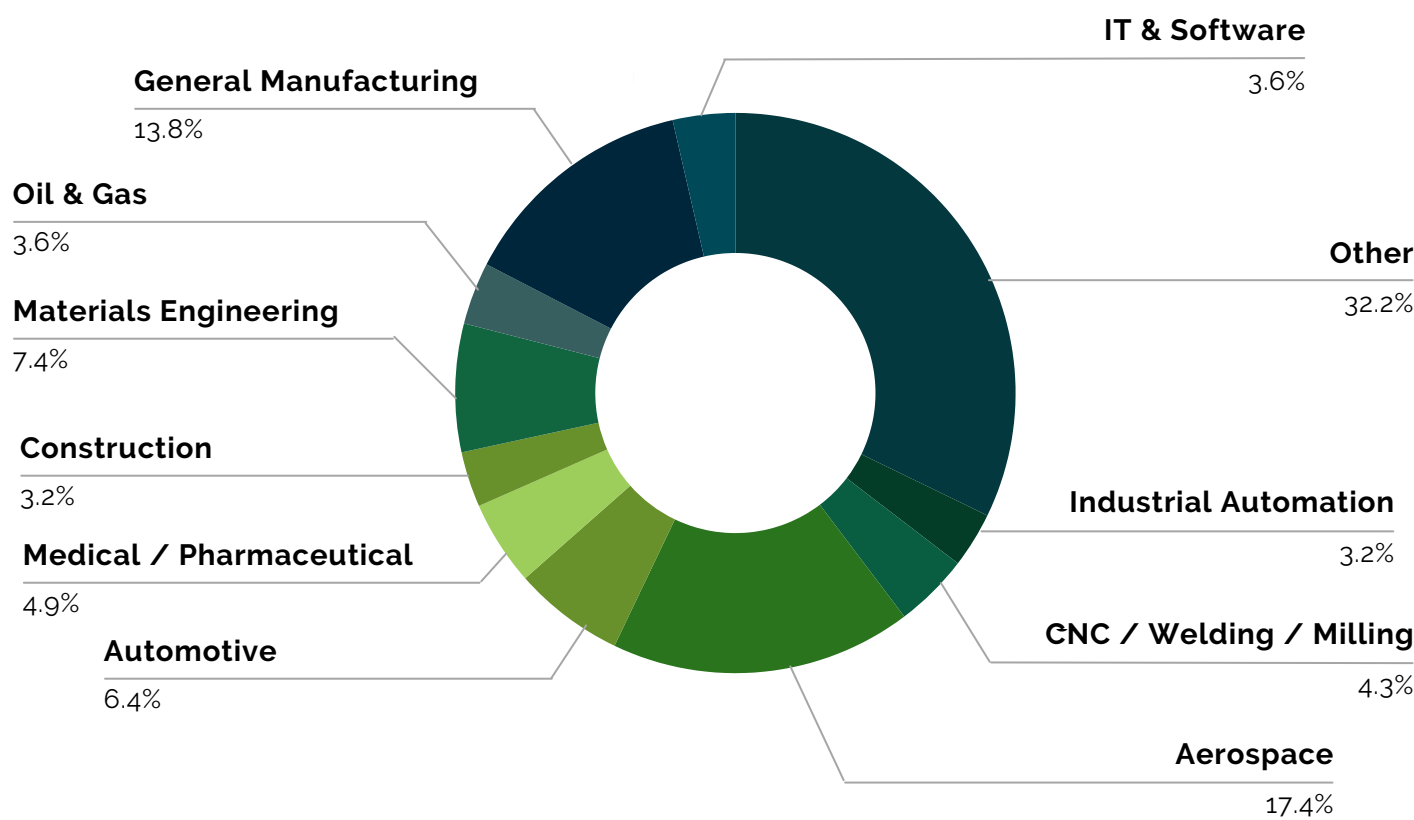
PROFESSIONALS' EXPERIENCE IN ADDITIVE MANUFACTURING

According to our 2025 survey, most additive manufacturing professionals have 6-10 years of experience, while the proportion with over 10 years is steadily increasing. This reflects a maturing industry but raises concerns about the pace of new talent entering the field, suggesting that the talent pipeline may not be growing quickly enough to meet future demands. Strengthening efforts to attract and train new professionals will be critical to sustaining industry growth.

Years of Additive Manufacturing Experience Among Professionals



INDUSTRIES WORKED IN BEFORE AM



41.5%

of survey respondents came from Adopter industries, namely Aerospace (17.4%), Automotive (6.4%), and Medical / Pharmaceutical (4.9%). With these being among the biggest adopters of AM technologies, it's little wonder that talent may find overlaps into the AM industry within their skillset and experience.

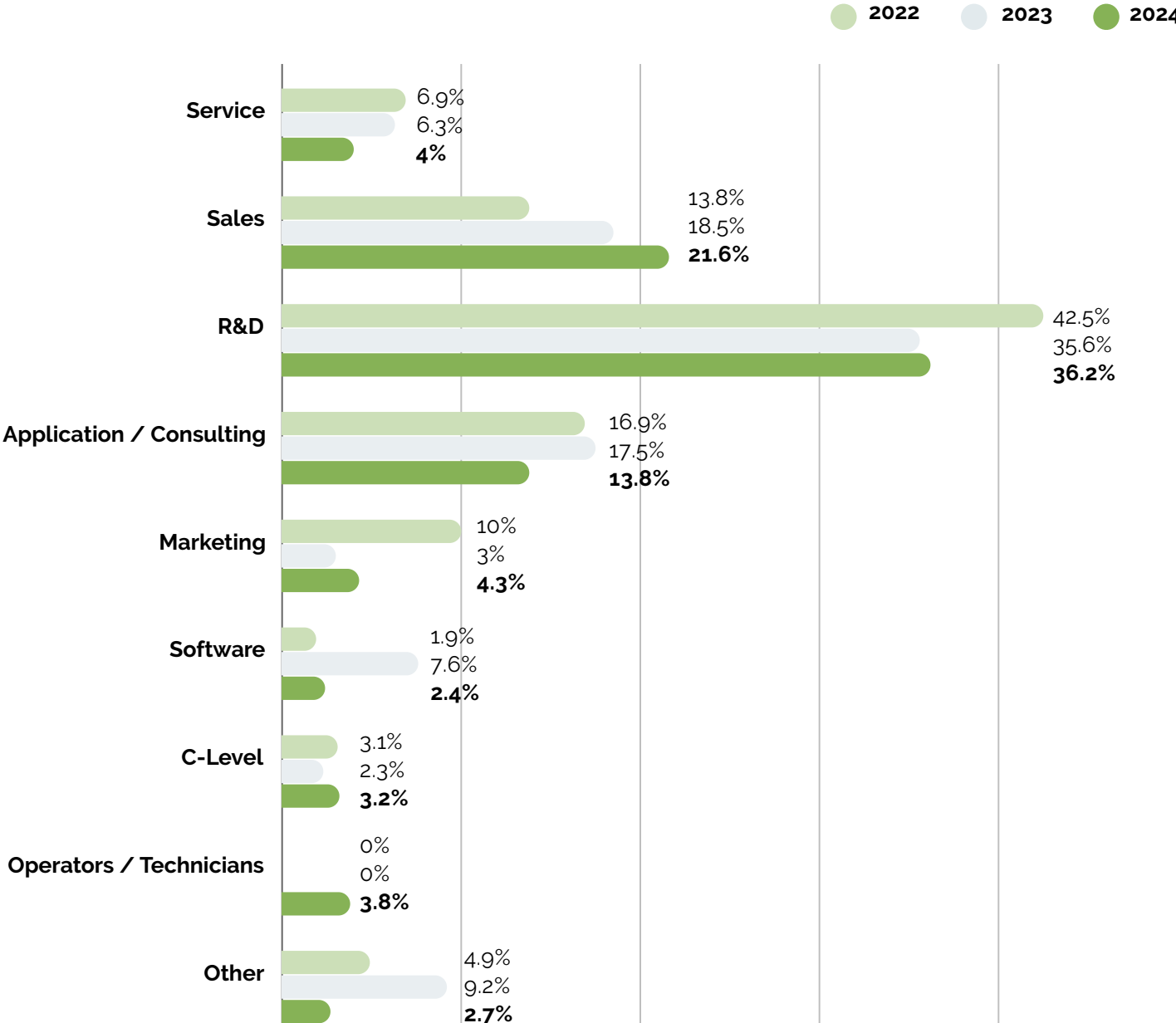
12.1%

of survey respondents worked in 'supplier' industries before moving into AM, namely IT & Software (3.6%), Materials Engineering (7.4%) and Chemical Engineering (1.1%). This is also unsurprising as their skillset, knowledge and experience would be highly sought-after in AM businesses looking to bring software and materials solutions in-house, or who already have it in-house.

23.8%

of survey respondents reported having exclusively worked within the additive manufacturing (AM) sector. This marks a slight decline of 6% points from the previous year, when 29.7% indicated their experience was solely in AM. This shift potentially reflects the growing convergence between additive manufacturing and traditional manufacturing, a trend observed in the previous year. As AM technologies continue to gain traction across adopter industries, many professionals are transitioning to these sectors, leveraging their specialized skills in broader, more diverse applications where AM is increasingly utilized.

DISCIPLINES PROFESSIONALS WORK IN, IN THE AM INDUSTRY



COMMERCIALIZATION IS AN ONGOING FOCUS

The consistent year-over-year rise in participation from Sales professionals suggests that the industry is transitioning from R&D-driven growth to a focus on market penetration and commercialization; a trend that has been prevalent over the last many years.

SOFTWARE PARTICIPATION SHOWS VOLATILITY

The sharp fluctuations in Software roles might reflect shifts in how digital tools are being integrated into workflows, possibly indicating that software needs are now more niche or specialized.

INDUSTRY TURNOVER

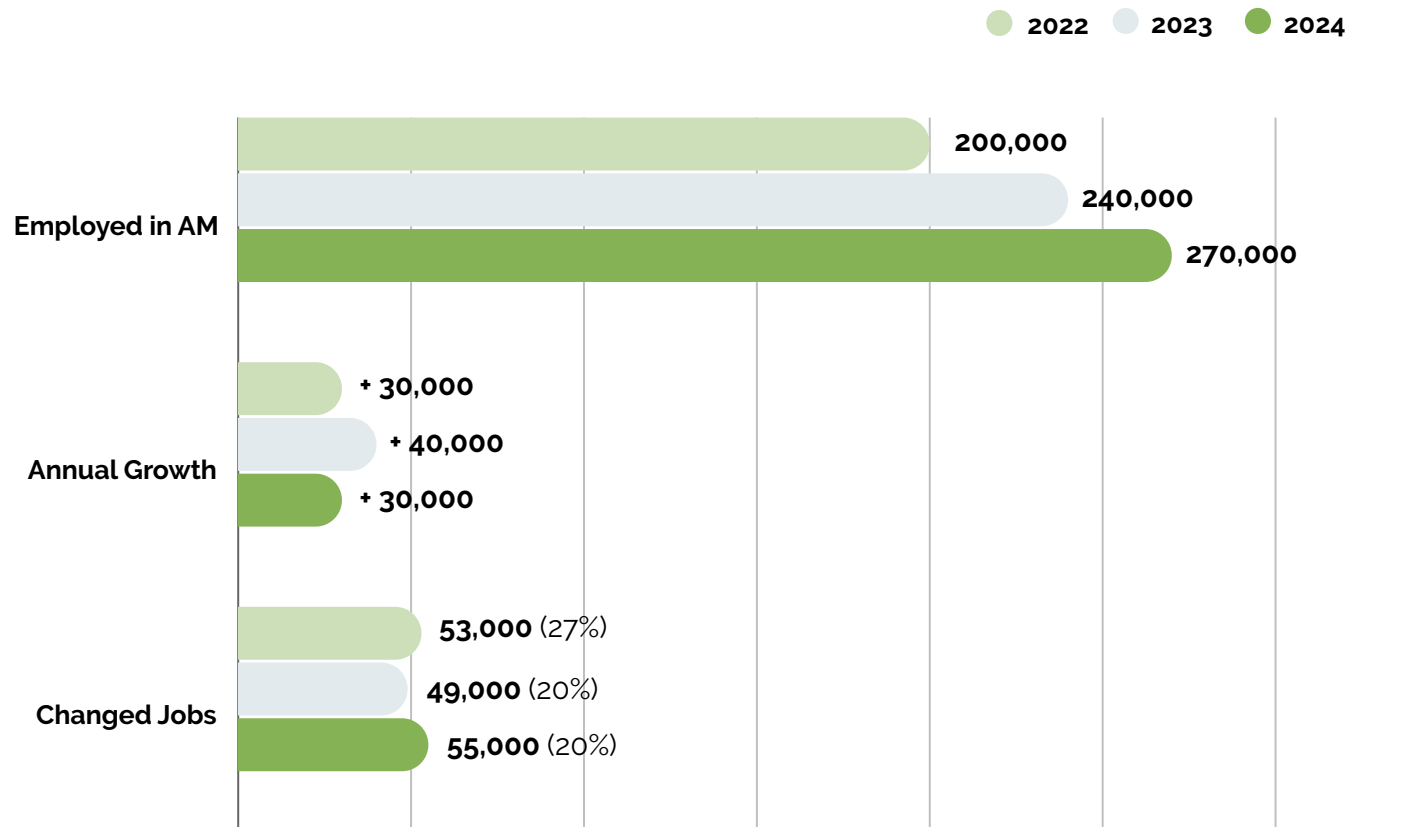
HOW IS THE TALENT MARKET MOVING?

Using LinkedIn we were able to collect and analyze data on the movement of AM professionals in the last year and compare it with the previous year.

Last year's AM Salary Survey predicted that 21.6% of the industry workforce would likely change jobs. This forecast proved accurate, as our data this year shows 22.6% of the industry made job changes in 2024. Looking ahead to 2025, predictions suggest a leveling off in talent movement, with 22.9% of the workforce considered 'Extremely Likely' to change jobs within the next 12 months, similar to what we saw in 2024.

*In order to estimate the number of people who changed jobs we deduct the year on year growth from the total employed to get a baseline number. We then identify those who have worked for a company less than 1 year.

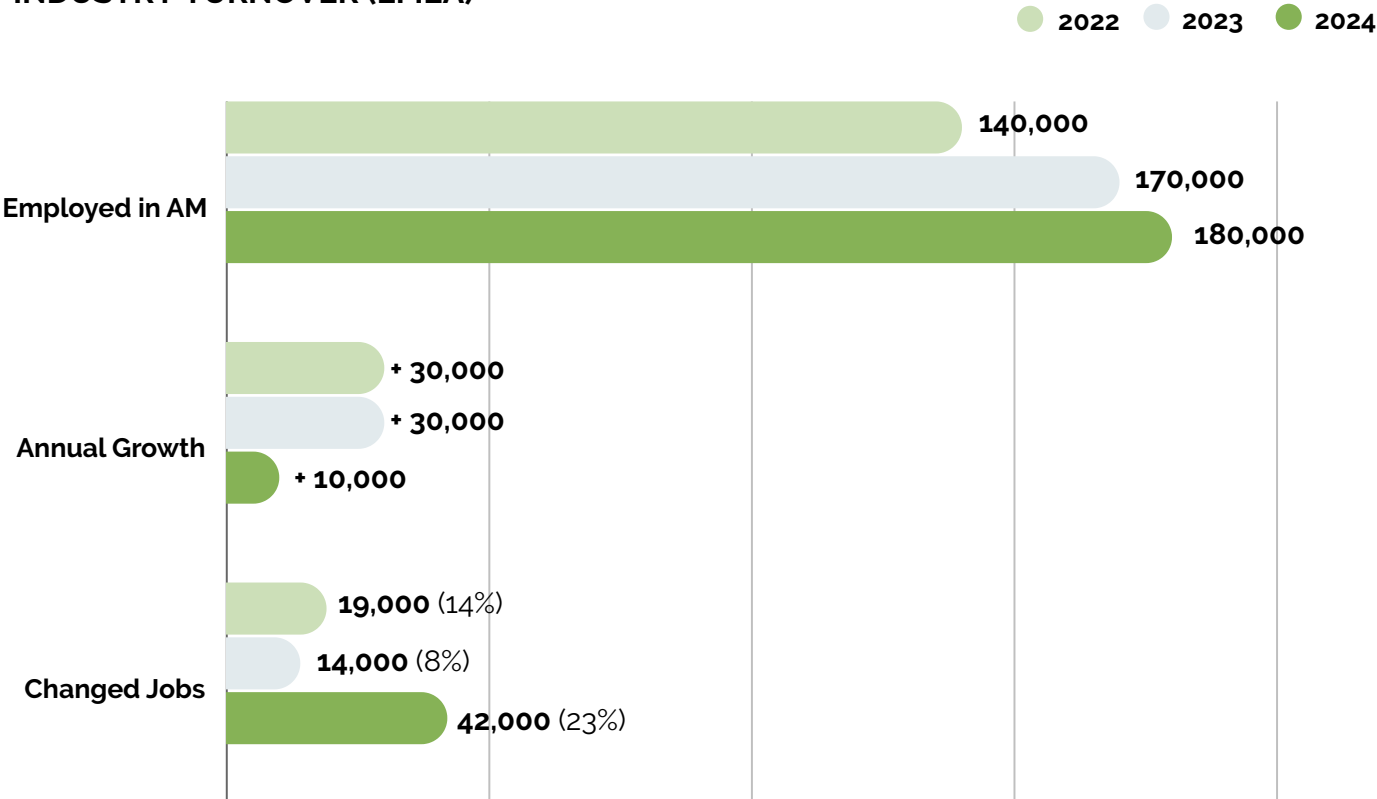
INDUSTRY TURNOVER (NORTH AMERICA & CANADA)



Of the 3 major regions highlighted in the report, North America & Canada demonstrates the largest growth in its talent market - of approximately 30,000 professionals.

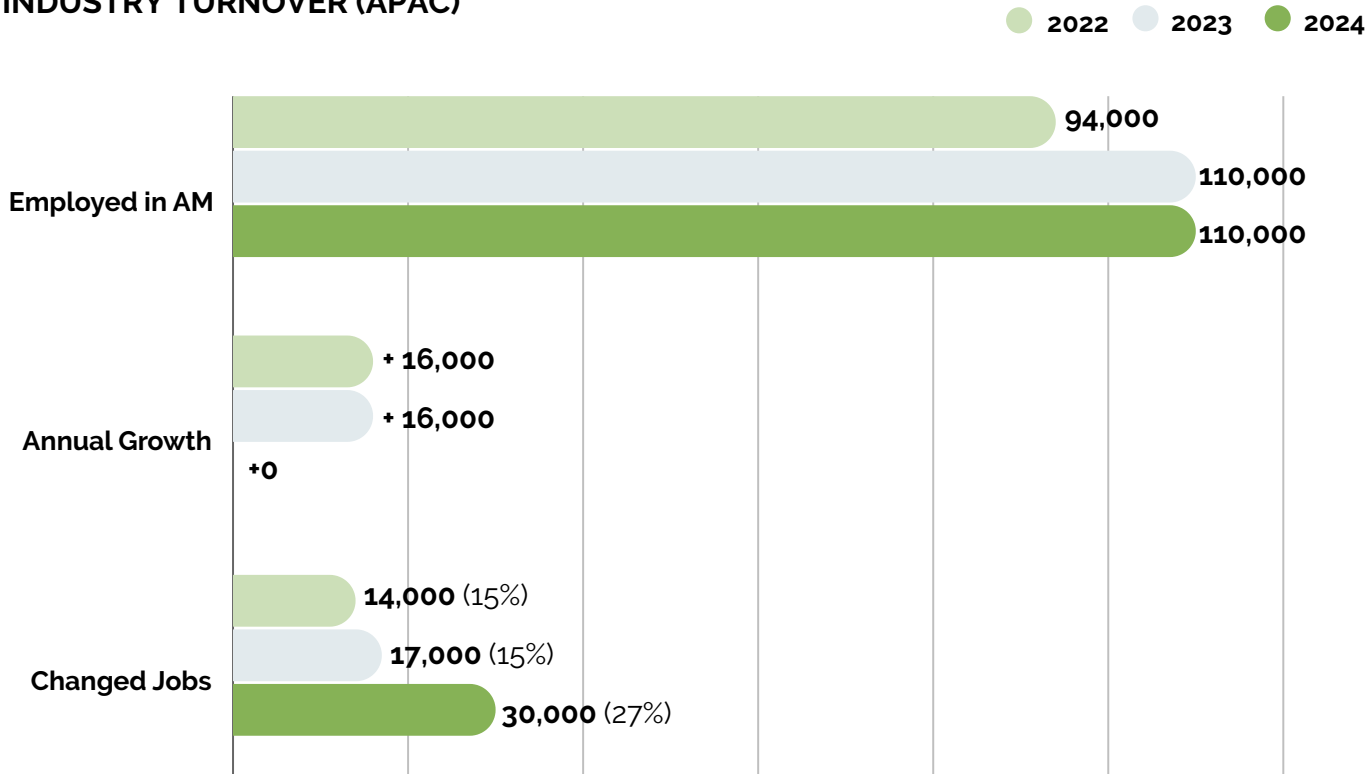
This is marginally less than in 2023, but still suggests a steady influx of new talent to the market there. In addition, approximately 55,000 (20%) professionals changed jobs in 2024. This is 1/5 of the workforce, indicating a relatively standard level of activity in the North American talent market in the past 12 months, particularly when considering overall turnover rate predictions for 2024 of 21.6% worldwide.

INDUSTRY TURNOVER (EMEA)



The data we collected for Europe shows a much similar picture. In 2024, the European talent market saw a much elevated turnover of 23%, which is a very significant difference of 15% points from the turnover that we saw in 2023, which is similar to what we see in North America. This would indicate a reawakened workforce in Europe following a year of uncertainty and reduced movement in the previous 12 month period.

INDUSTRY TURNOVER (APAC)



This year marks the first time we have a complete set of year-over-year (YoY) data for the APAC region, allowing us to analyze trends over a three-year period. In 2024, we observe a concerning development in the market: there were no new additions to the talent pool, with growth remaining flat at 0%. Furthermore, employee turnover in the region has nearly doubled over the past year. Turnover rates surged to 27%, representing the movement of approximately 30,000 professionals, compared to just 15% in the previous year.

These figures suggest that the APAC region has become significantly more volatile in the last 12 months. Despite the reported extensive growth in the region, especially in the Chinese market, as outlined in our 2024 Report, this volatility could indicate a shift in the job market dynamics. With increased success and investment in the region and the slight rise in job opportunities throughout 2024, as discussed earlier in this report, professionals may be feeling more confident about their prospects and, as a result, are more inclined to explore new opportunities and change jobs.



MARKET INSIGHT: WHAT'S HAPPENING TO HIRING IN AM?

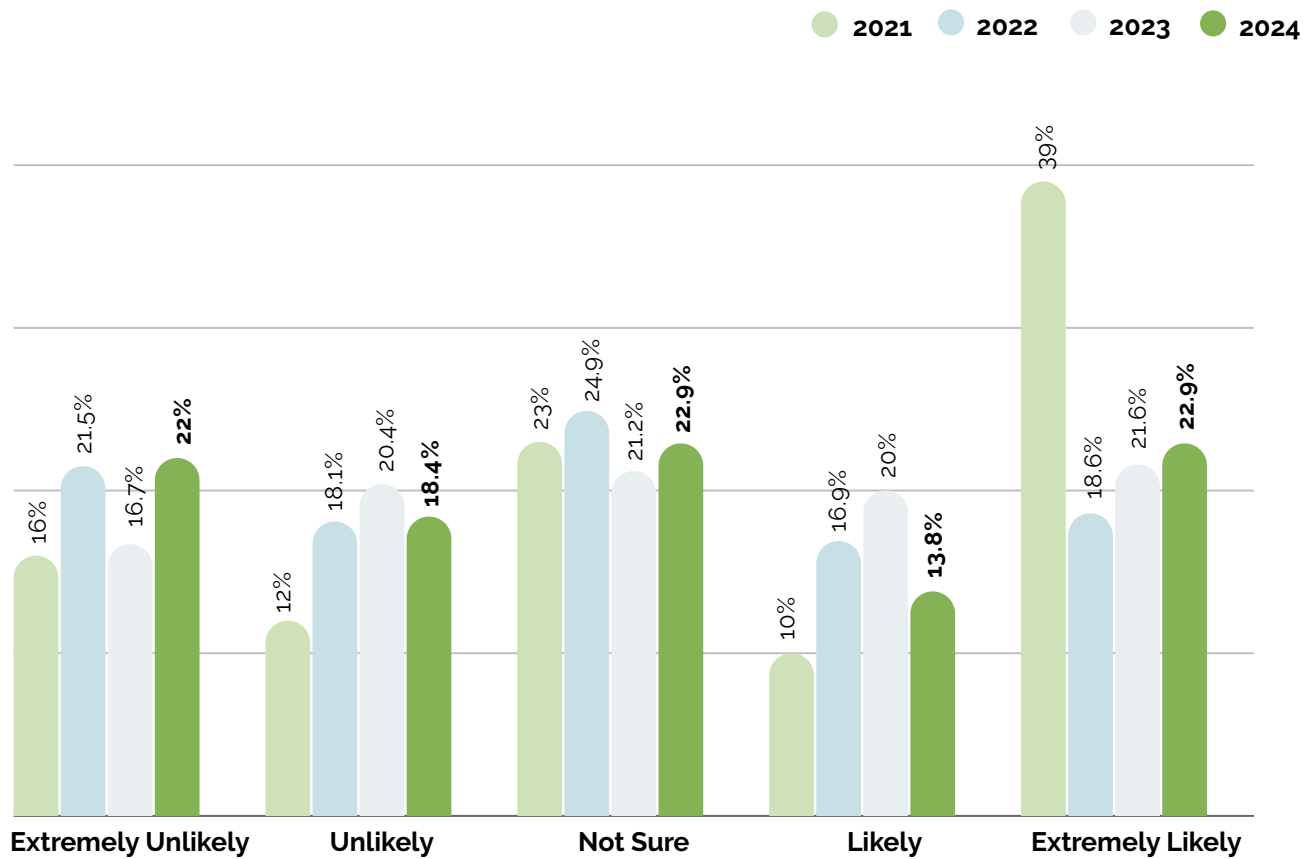
The data indicates slower industry growth compared to the previous year, with around 76,000 new professionals joining the workforce across North America, EMEA, and APAC. This total represents roughly 10,000 fewer additions to the talent pool than in 2023, underscoring a modest deceleration in industry expansion.

A significant decline in industry job openings and restricted job mobility, particularly in North American and EMEA markets, has highlighted the influence of macroeconomic conditions on hiring trends throughout 2024.

In North America & Canada, hiring decreased by 14% compared to 2023. While still a downward trend, this represents a substantial recovery from the sharp 77% decline observed between 2022 and 2023. In EMEA, job availability dropped by 21%, marking a slightly steeper reduction, whereas APAC experienced an 18% decrease in hiring over the past year. Both EMEA and APAC, however, have also shown improvement over 2023 figures, where job availability declined by 46% and 65%, respectively. Despite these recoveries, each region continues to face a constrained hiring landscape.

Over the past three years, this trend of reduced hiring and mobility has become increasingly evident. North America and Canada saw a 9% decrease in job movement in 2024, EMEA exhibited a net-zero change in mobility, and only APAC saw an 8% increase in job market movement. Together, these data points illustrate an industry that is adjusting to prolonged economic pressures by adopting a more cautious approach to hiring and talent mobility, reflecting a broader strategic shift as the market matures.

LIKELIHOOD OF AM EMPLOYEES TO CHANGE JOBS WITHIN ONE YEAR



The 2024 data on AM professionals' job mobility shows a stabilization in those 'Extremely Likely' to change jobs, alongside an increase in those 'Extremely Unlikely' to switch roles, suggesting a cautious approach amid lingering market uncertainty. While job mobility interest remains high, professionals appear divided, with some actively seeking new opportunities and others prioritizing stability following the 2023 layoffs. This trend indicates a workforce balancing optimism for new prospects with a pragmatic approach to current market conditions.

In the 'Extremely Likely' category, there has only been a 6% increase in individuals wanting to change job. In the same instance, in the 'Extremely Unlikely' category, there has been a 31.7% increase.

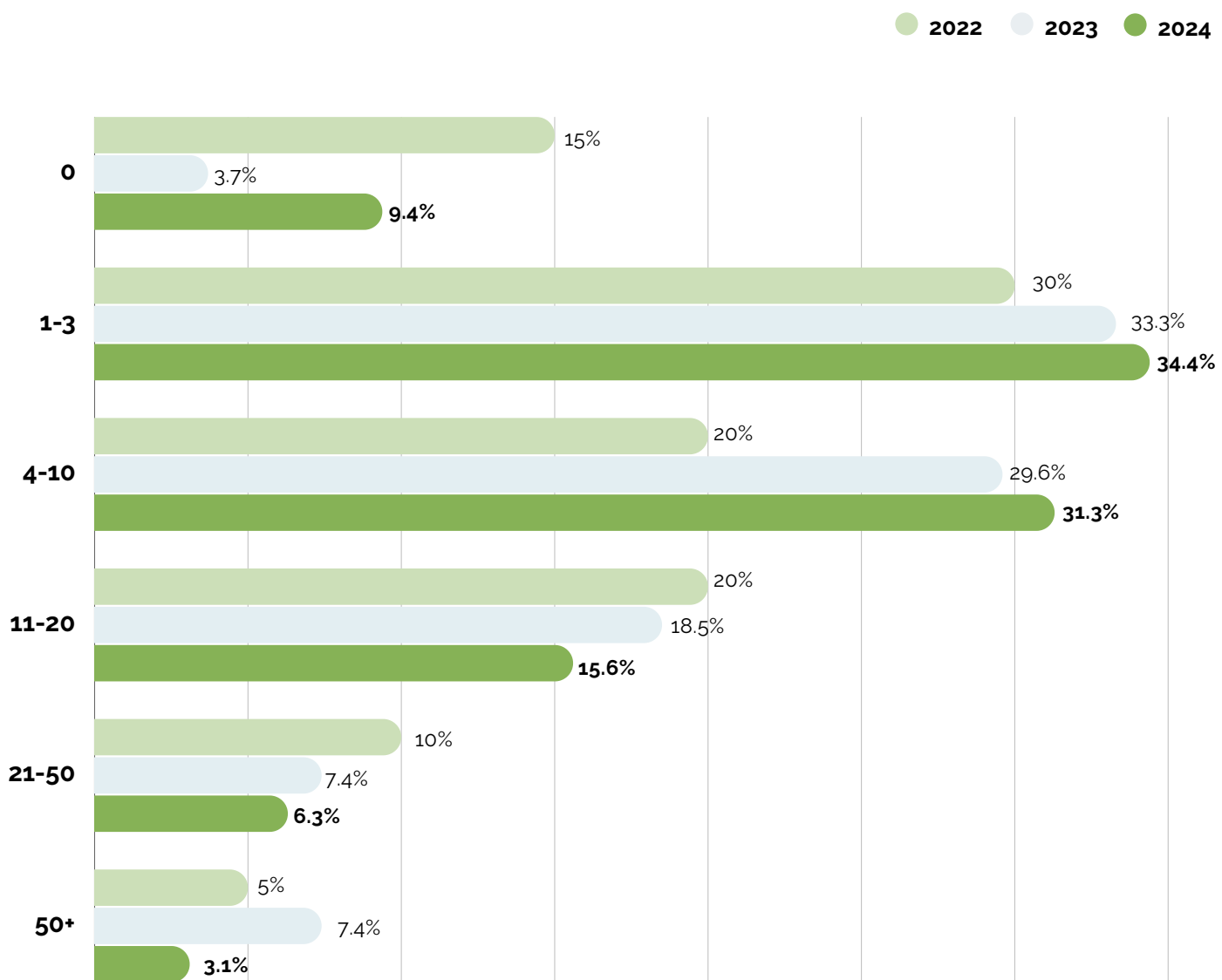
- +8.9%** **40.4%** of respondents are 'Unlikely' or 'Extremely Unlikely' to change jobs
- 11.8%** **36.7%** The percentage of respondents 'Very Likely' or 'Extremely Likely' to change jobs has declined to 36.7% in 2024, down from 41.6% in 2023. This marks the third consecutive year of relatively low interest in job changes, reflecting fluctuating confidence in the market as professionals opt for stability amid rapidly shifting conditions.

WHAT DOES THE MARKET / EMPLOYERS DEMAND?

GENEREL HIRING INTENT

Each year, we assess the hiring intent of organizations participating in our survey, revealing shifts in the AM hiring landscape. Looking ahead to 2025, 65.7% of companies indicate plans to hire 1-10 new professionals over the next 12 months. This marks a notable decrease in hiring intent compared to 2024 where the majority of demand was for between 4-20 professionals, suggesting that employers are adopting a more selective approach as they prioritize specific roles and skill sets in the coming year.

of Positions Companies are Hiring in the Next 12 Months

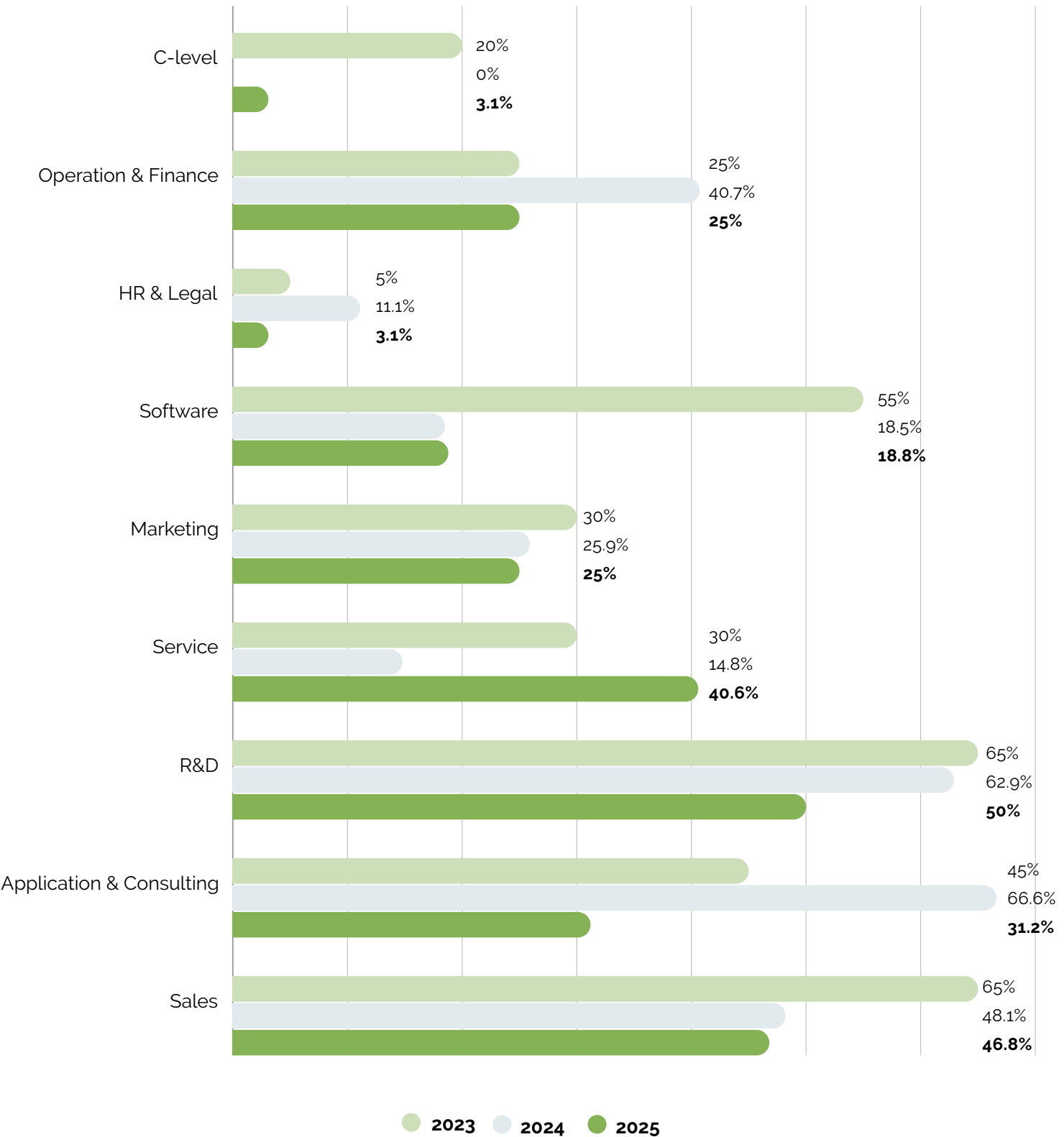


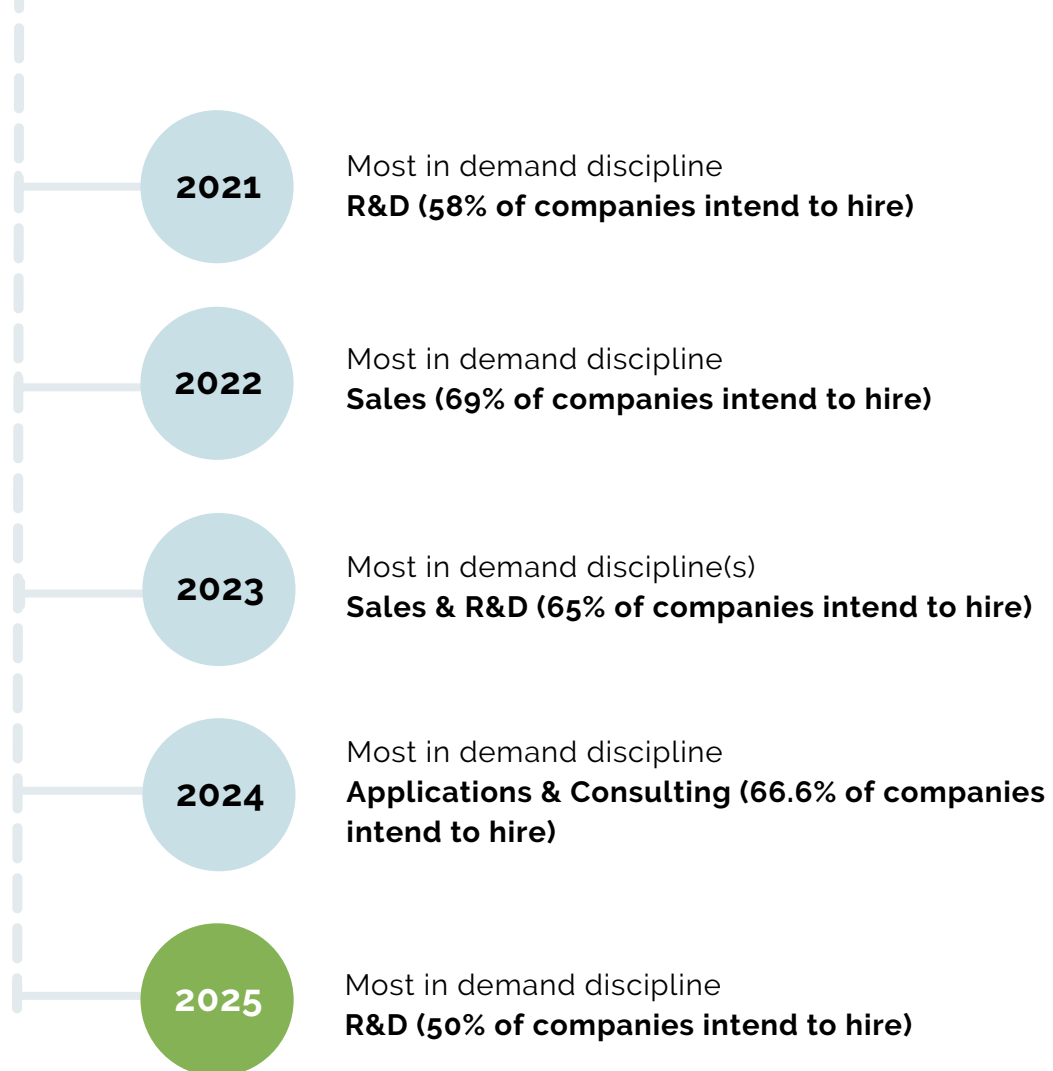
On the following page, we'll take a closer look at which disciplines will be in highest demand based on the responses given by Hiring Managers who took part in the 2025 Salary Survey.

MOST IN-DEMAND DISCIPLINES

The data below shows which disciplines AM employers are likely to hire in the next 12 months.

Most In-Demand Roles from Employers





MARKET INSIGHT: WHY IS R&D BACK IN-DEMAND?

The data highlights a notable evolution in hiring trends within the additive manufacturing industry. Specifically, 50% of respondents plan to hire for R&D roles, indicating a strong commitment to innovation and technological advancement as companies strive to remain competitive. Following closely are Sales roles at 46.8%, which underscores the critical need for enhanced market presence and stronger customer relationships in an expanding landscape.

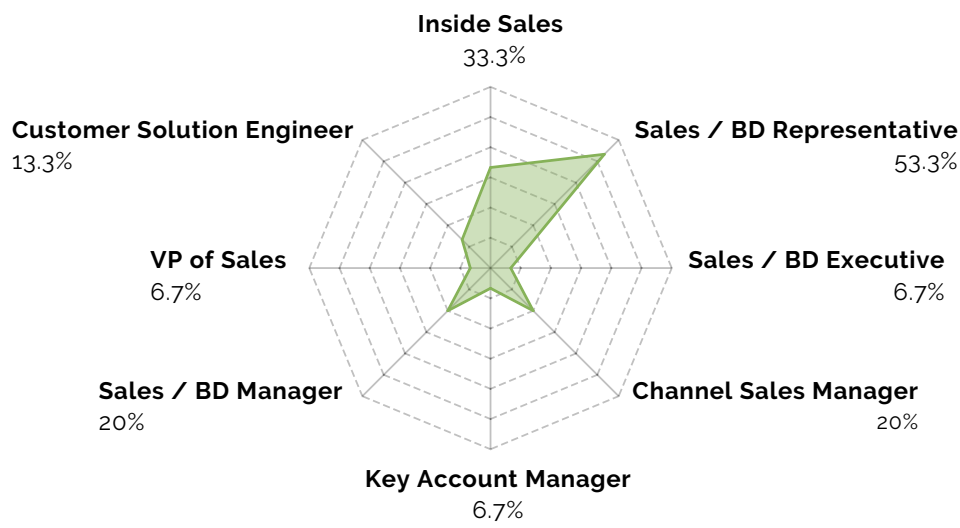
Interestingly, Service Engineering has seen a resurgence with 40.6% of respondents expressing hiring intent for this discipline, which has not been among the top in-demand roles for at least the past 5 years. This renewed focus reflects a growing awareness of the importance of post-sale support in maximizing customer satisfaction and ensuring successful implementation of AM technologies.

Collectively, these trends illustrate a strategic shift towards fostering innovation, engaging customers effectively, and providing robust service offerings, positioning organizations for success in a dynamic marketplace.

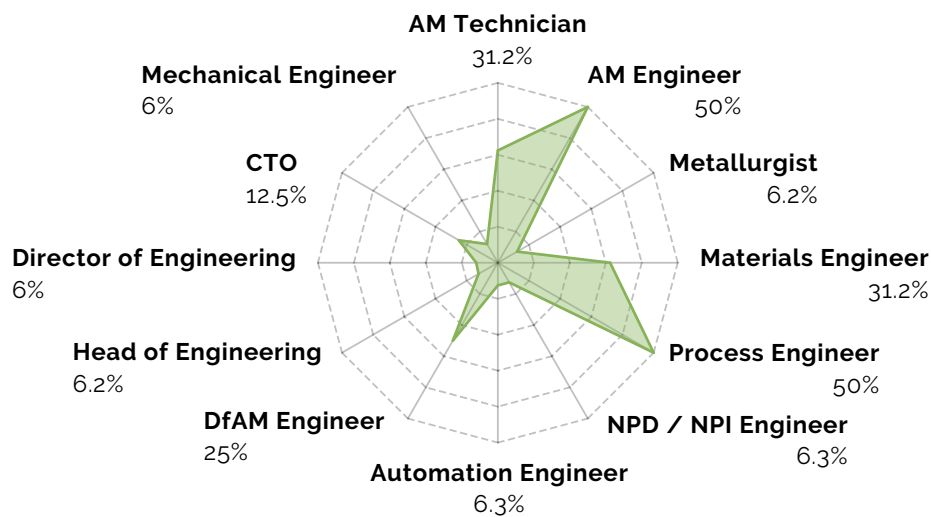
MOST IN-DEMAND ROLES

The data below shows which specific roles AM employers stated that they would be likely to hire in the next 12 months.

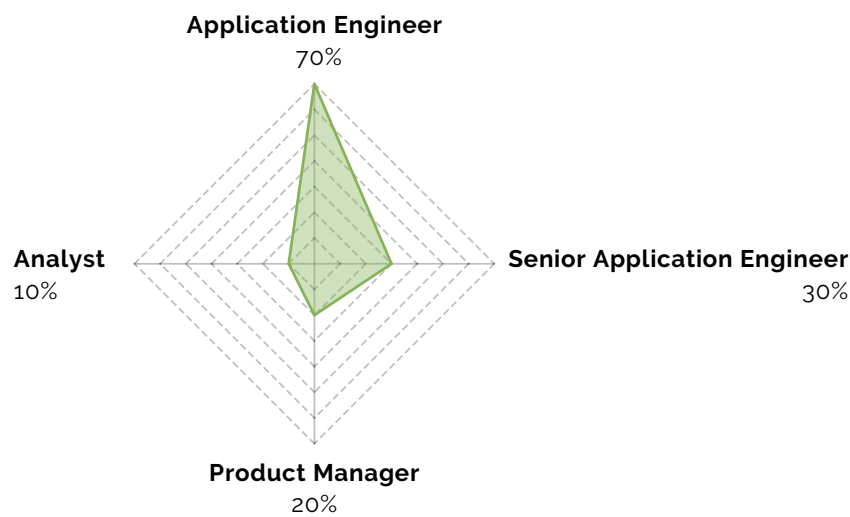
Sales Roles



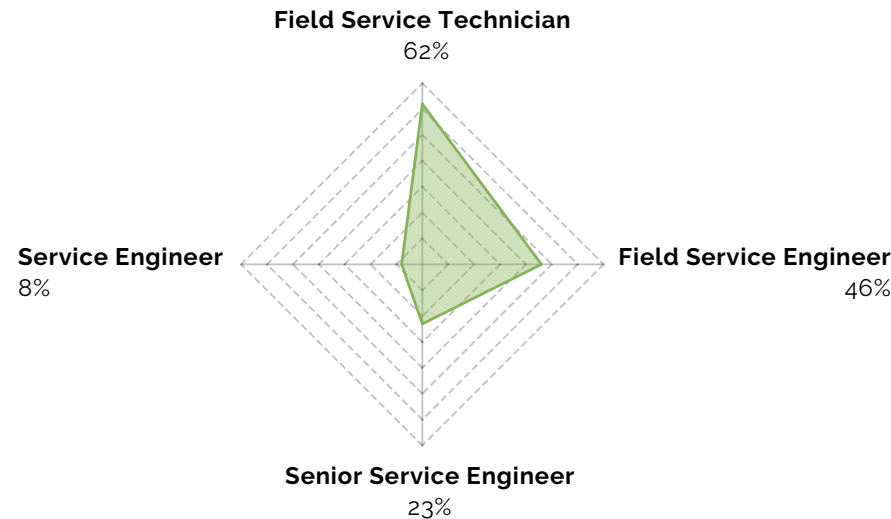
R&D and Engineering Roles



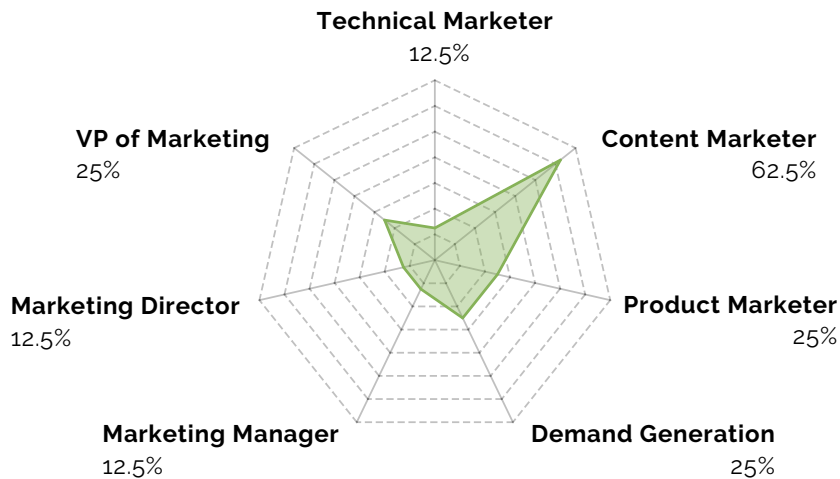
Applications & Consulting Roles



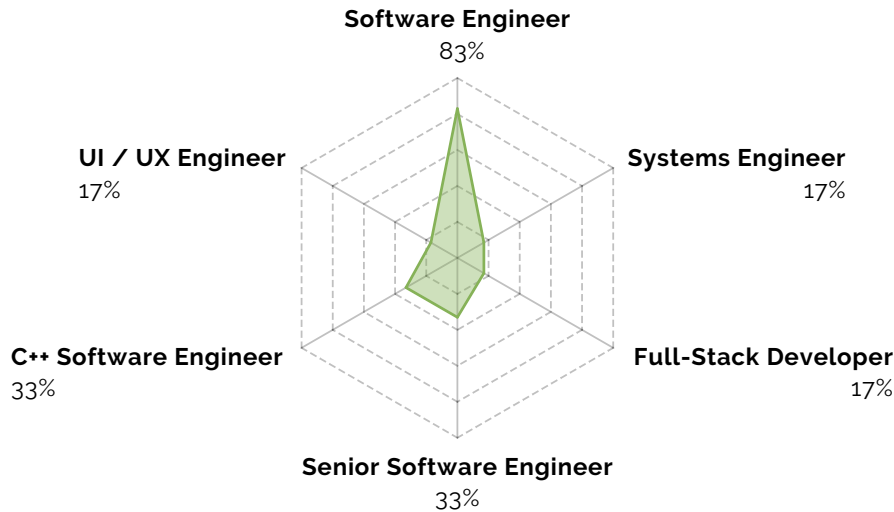
Service Engineering



Marketing

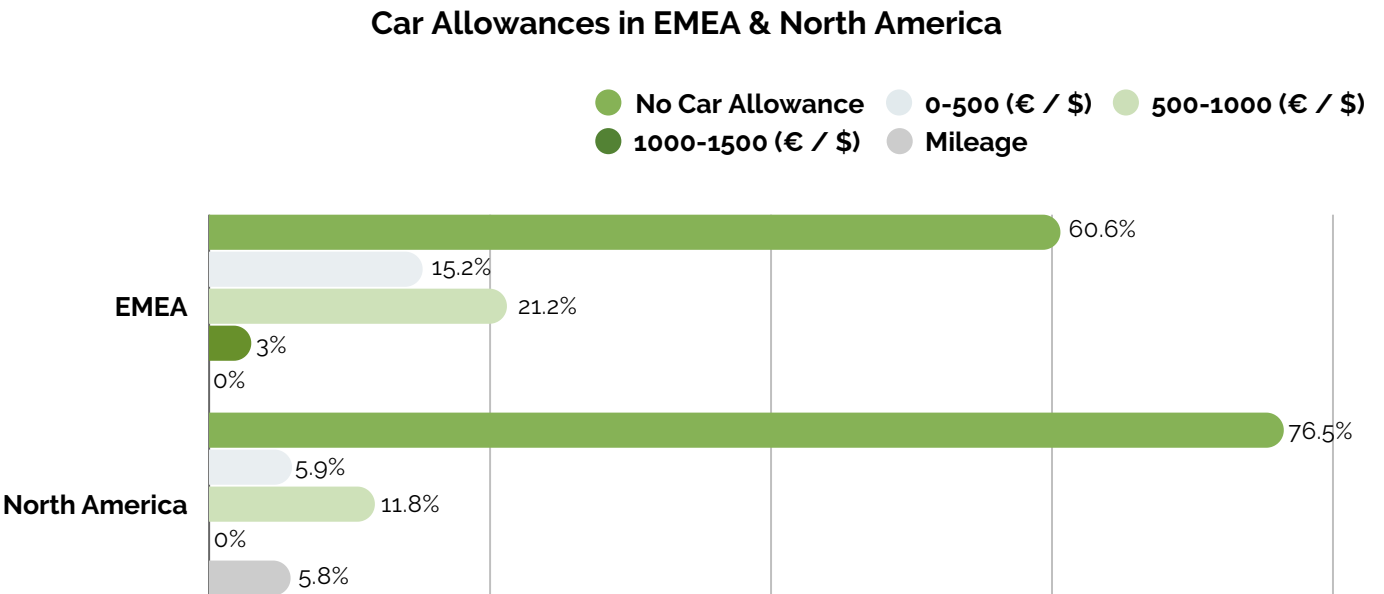
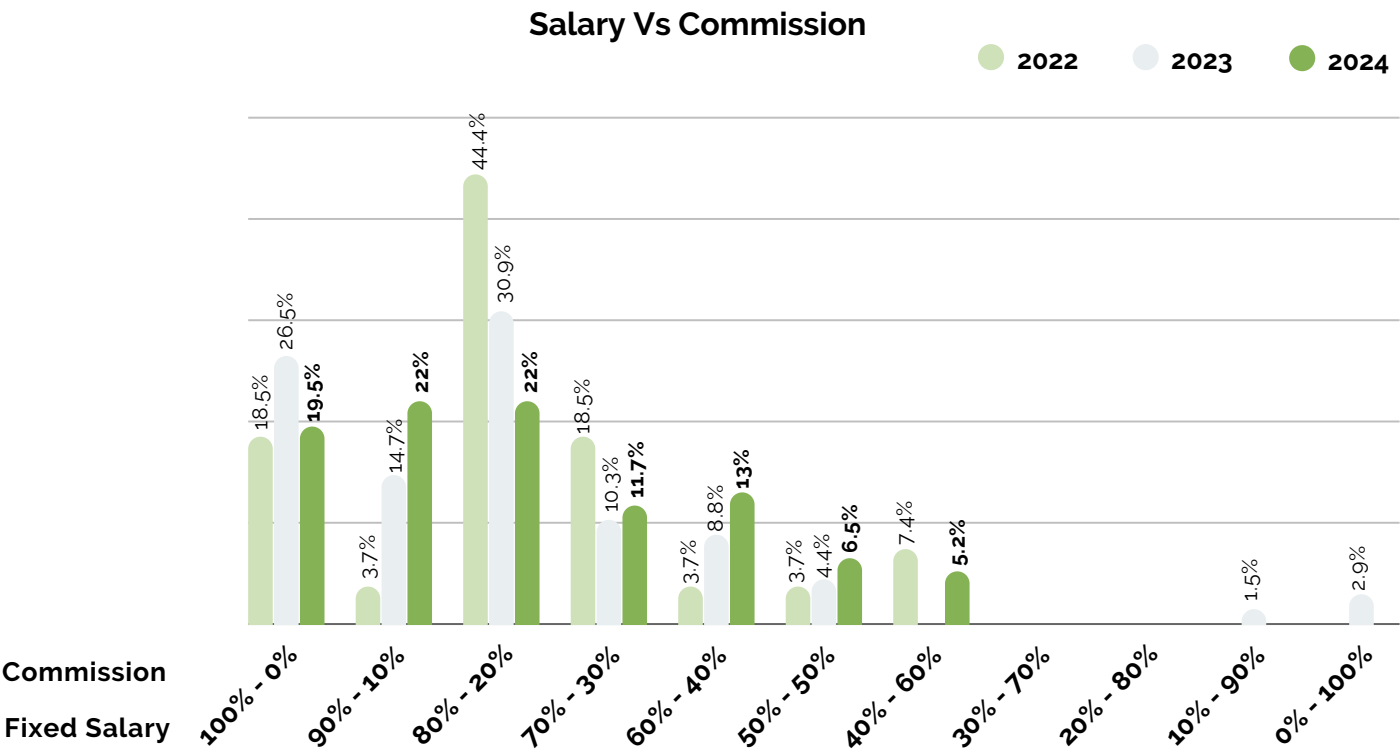


Software



HOW SALES FUNCTIONS ARE BEING PAID

Each year, we survey respondents in Sales about their salary-to-commission structure. The 2025 AM Salary Survey results, shown in the graph below, reveal an ongoing shift toward a higher base salary with a smaller commission component. Consistent with 2023, the most common salary-commission split remains 80% fixed salary and 20% commission. Notably, however, there has been a significant rise in respondents receiving a 90% fixed salary to 10% commission split, reflecting a growing preference for income stability in AM Sales.



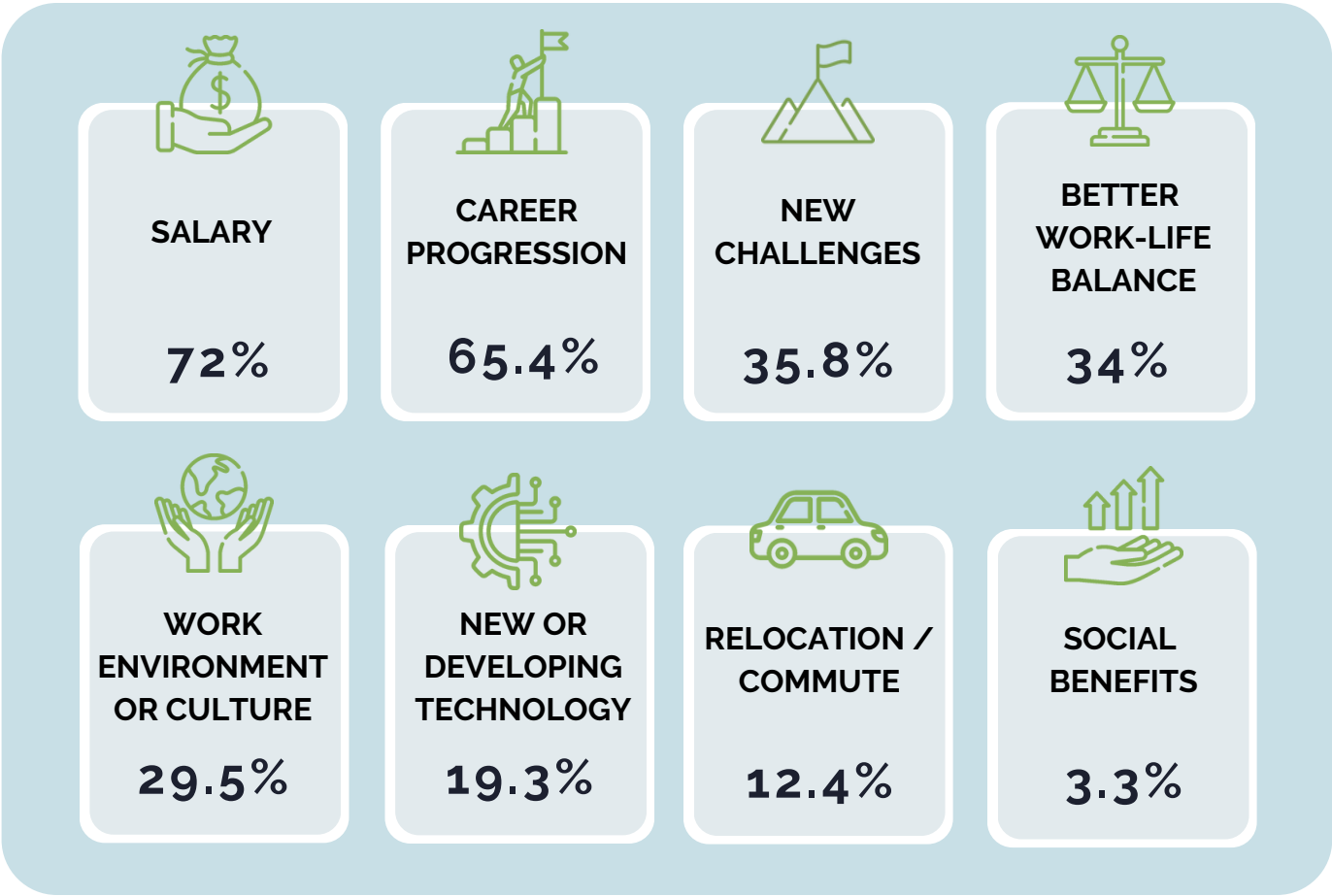
This year we have also included data on the most common car allowance structures in compensation packages for sales people across EMEA and North America & Canada.

WHAT ATTRACTS TALENT?

In this war for talent where talent is scarce, how can additive manufacturing employers attract and retain the most talented people?

To answer this question we must first look at the main motivators for employees to change jobs along with the benefits, besides salary, that employees value the most.

MOTIVATIONS TO CHANGE JOBS FOR AM PROFESSIONALS



SALARY IS REMAINS THE BIGGEST MOTIVATOR FOR TALENT

72% of respondents declared 'Salary' as the main motivator for wanting to change jobs in 2024. That's 8.8% points lower than last year, signaling a potential shift in what could motivate Talent going forward.

WORKLIFE BALANCE AND COMPANY CULTURE STAND THE TEST OF TIME

The 2025 AM Salary Survey responses indicate that work-life balance and company culture have remained steady motivators for job changes over the past three years. However, in 2025, "Work Environment or Culture" was the only motivator to see an increase, while "Work-Life Balance" held strong, with 34% of respondents ranking it among their top three reasons to consider changing jobs. This trend is particularly noteworthy as all other motivators saw a decrease in popularity this year, underscoring the growing importance of workplace culture and balance in employee retention.

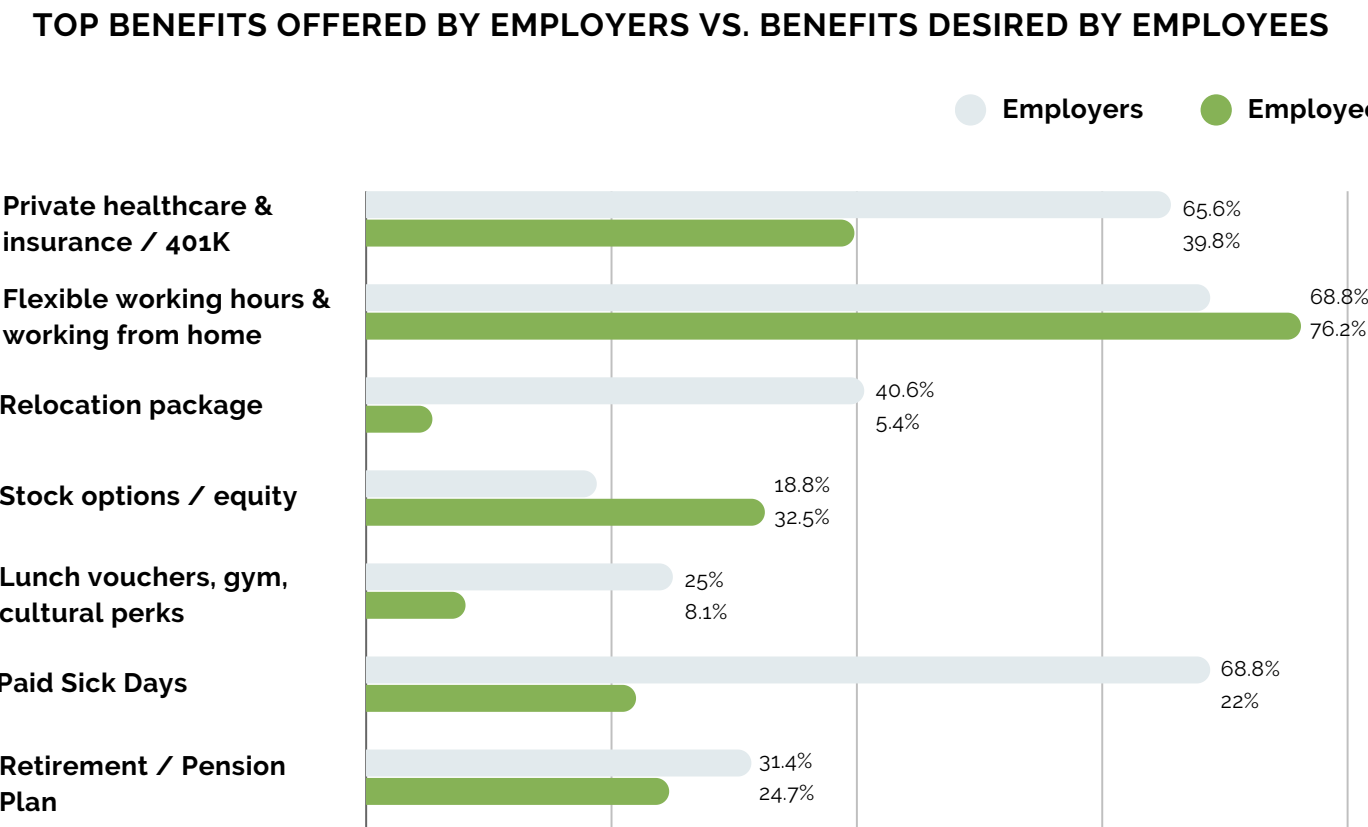
DESIRED EMPLOYEE BENEFITS

Below we explore the three most valued benefits by AM professionals, along with the three most commonly offered benefits by employers in 2024.

Notably, "Flexible working hours and WFH" has surged in popularity, moving from the 3rd to the 2nd most commonly offered benefit. Meanwhile, "Stock Options / Equity" has fallen off the list of most valued benefits by professionals, replaced instead by "Remote Working". This indicates a clear preference for flexibility over financial incentives. This shift demonstrates that the industry is holding fast on prioritizing work-life balance and autonomy as key components of job satisfaction.

MOST VALUED BENEFITS BY EMPLOYEES	MOST COMMONLY OFFERED BENEFITS BY EMPLOYERS
1 Flexible working hours and working from home	1 Paid sick days
2 Remote Working	2 Flexible working hours and working from home
3 Private healthcare & insurance / 401K	3 Private healthcare & insurance / 401K

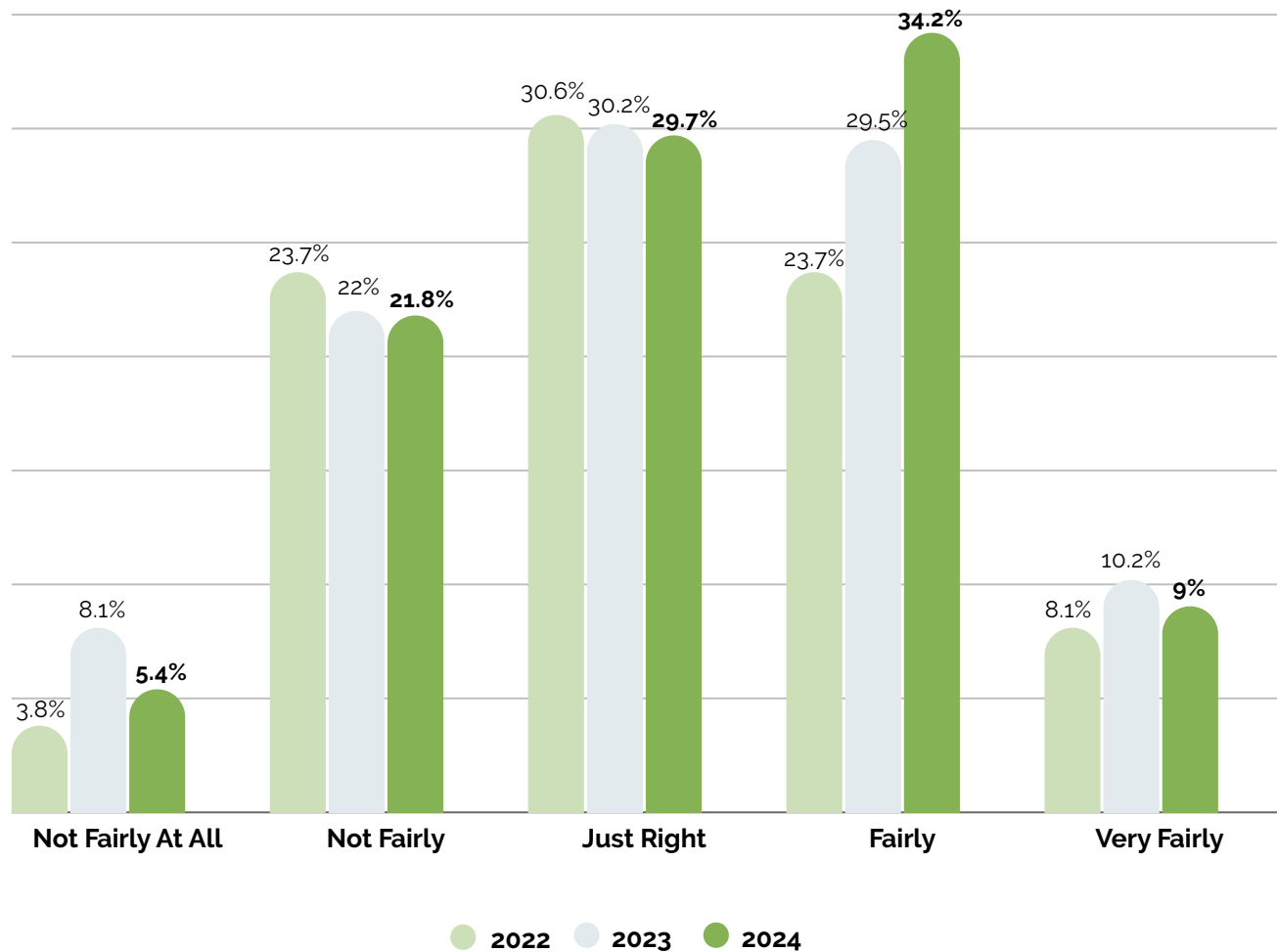
The graph below shows how the desired benefits of employees compare against the benefits AM employers are currently offering.



SALARY COMPETITIVENESS

As 'Salary' has reached a record-breaking ranking as the #1 motivator for changing jobs, let's assess the general perception of the competitiveness of salaries in the AM industry. The graph below demonstrates attitudes of professionals on their level of satisfaction towards what they are currently being compensated (base salaries).

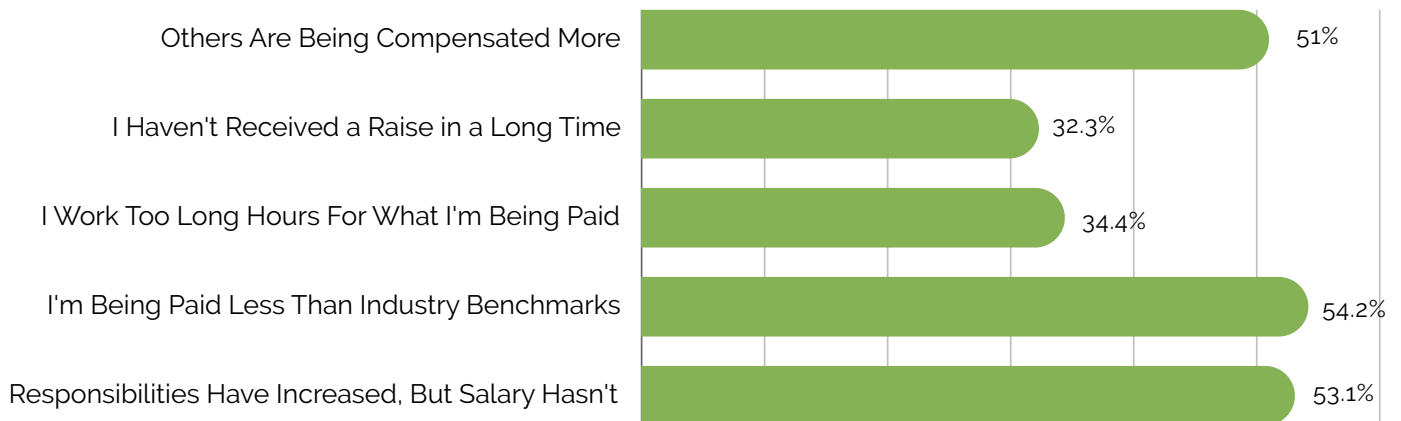
IN YOUR OPINION, HOW FAIRLY ARE YOU BEING PAID/COMPENSATED?



An overwhelming majority, 72.9% of AM professionals, feel that they were compensated 'Just Right,' 'Fairly,' or 'Very Fairly' throughout 2024. However, 27.2% of professionals still express the sentiment that they are paid 'Not Fairly' or 'Not Fairly At All.'

Analyzing the data, there is a noticeable year-on-year shift towards a talent market that perceives their compensation to be fair. Focusing on the percentage of professionals feeling 'Not Fairly' compensated, there has been a 9.6% decrease in this sentiment within the past 12 months. In contrast, there is a 4.3% increase among professionals who believe they are paid 'Just Right,' 'Fairly,' or 'Very Fairly' in the past 12 months. This positive trend bodes well for the industry and the talent within AM. However, now just over one-quarter of professionals still feel unfairly compensated. On the next page, we delve into the reasons why they may hold this perception.

REASONS FOR FEELINGS OF UNFAIR COMPENSATION



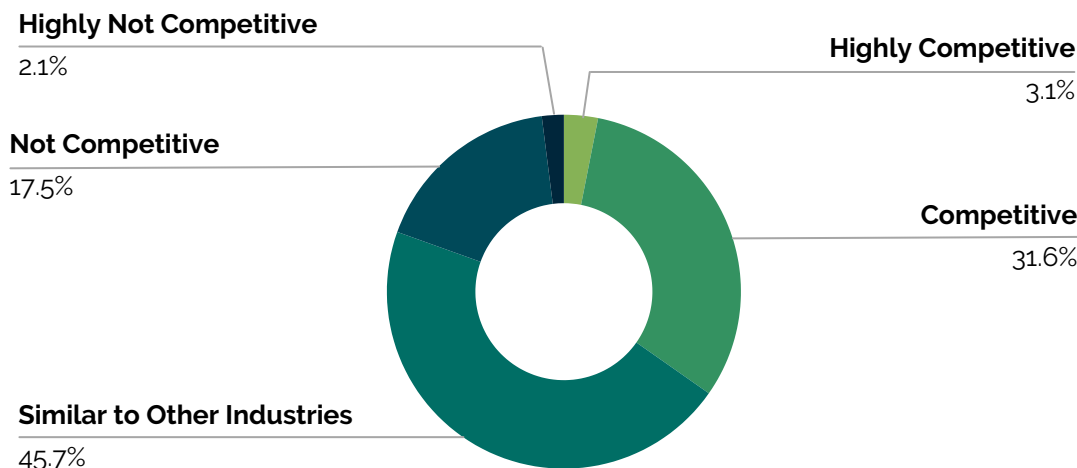
PROFESSIONALS WANT OUT OF UNFAIR PAY PRACTISES

Over the past 12 months, the top two reasons cited for feeling undercompensated have seen notable increases: "Others Are Being Compensated More for the Same Work" rose by 3.8 percentage points to 51%, and "I'm Being Paid Less Than Industry Benchmarks" increased by 4.8 points to 54.2%. These shifts highlight a growing desire among professionals for pay parity in roles with similar responsibilities. However, achieving true pay parity can be complex, as it must account for various factors such as individual experience, regional cost of living differences, and job performance, all of which contribute to nuanced and sometimes contentious discussions around fair compensation.

INCREASED RESPONSIBILITIES, BUT NO PAY INCREASE

The second most reported reason for feelings of unfair compensation, cited by 53.1% of respondents, is that while their responsibilities and workload have increased over the past 12 months, their compensation has not kept pace. This sentiment is understandable, as employees who feel undervalued or taken advantage of can quickly experience a drop in morale. Employers should be mindful of this risk when managing their teams, as unrecognized increases in workload can lead to disengagement and lower overall satisfaction across the business.

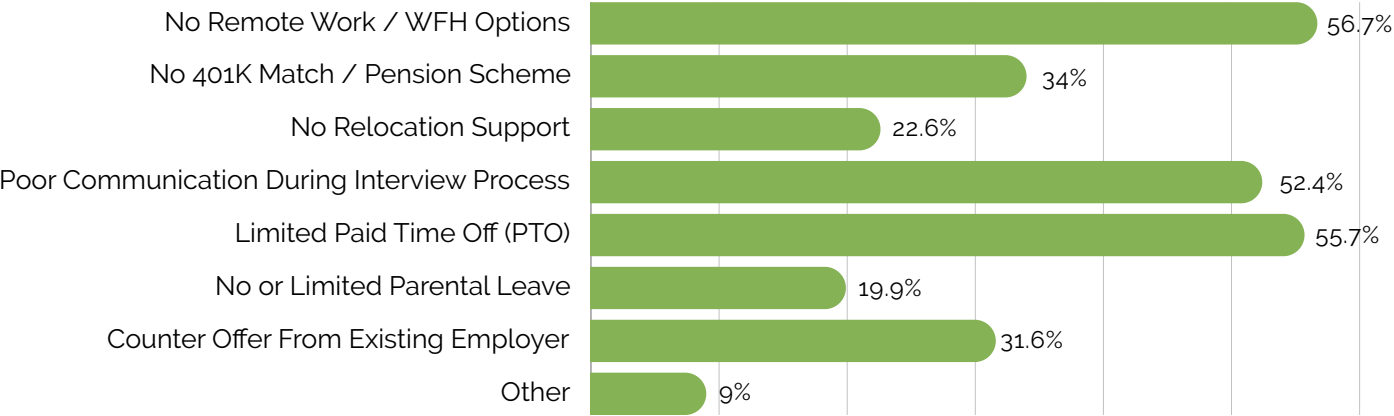
DO YOU THINK AM SALARIES ARE COMPETITIVE IN COMPARISON TO SIMILAR INDUSTRIES?



AM SALARIES ARE LEVELING OUT

In 2024, 45.7% of respondents considered additive manufacturing salaries to be "Similar to Other Industries," marking a 3.4% point increase from last year. Meanwhile, those rating salaries as "Highly Competitive" or "Competitive" declined by 3.9% points overall, suggesting a trend toward salary stabilization within the industry.

WHAT WOULD PREVENT YOU FROM ACCEPTING A NEW ROLE, EVEN IF THE THE OFFERED COMPENSATION WAS AGREEABLE?



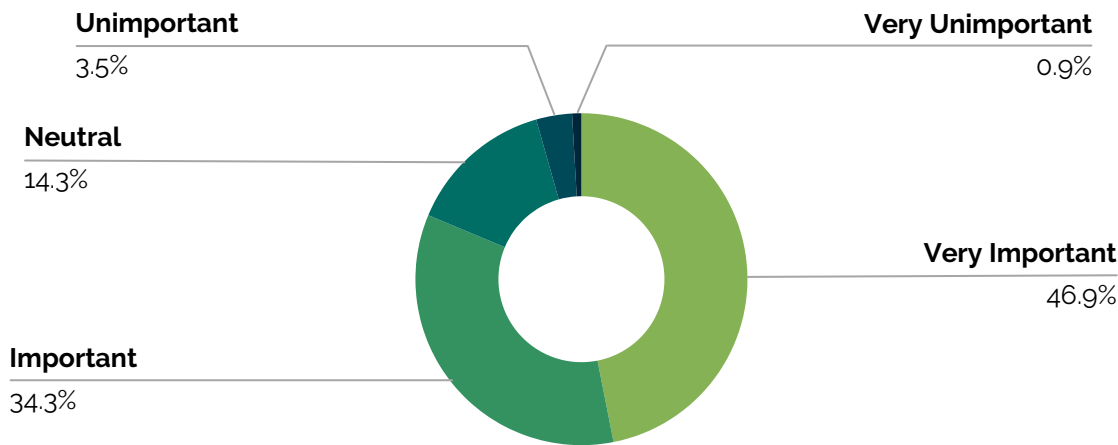
To attract and retain top talent, employers need to understand what might deter candidates from accepting a job offer. According to our findings, the top three reasons professionals might decline an offer are: lack of remote work or WFH options (56.7%), insufficient paid time off (55.7%), and poor communication during the interview process (52.4%).

While well-known factors like remote work options or benefits packages clearly impact candidates' decisions, it's essential to recognize the impact of effective communication during recruitment. With over half of respondents identifying poor communication as a primary reason for declining offers, employers should be aware of the lasting impression they make during the hiring process. Clear, respectful, and timely communication can significantly influence candidates' perceptions and enhance their likelihood of joining an organization.

UPSKILLING & CAREER PROGRESSION

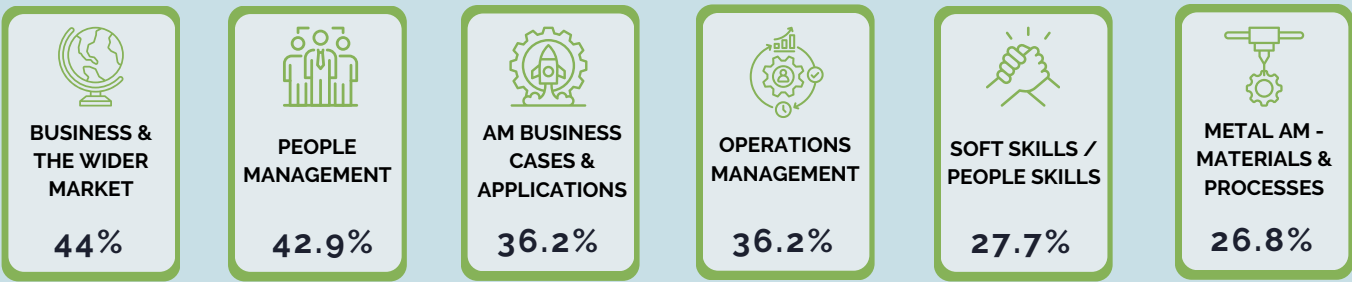
With 'Career Progression' the second highest motivator for changing jobs in 2025, what is the talent trying to do to ensure that they can move up in their careers? We asked participants just how important career progression is to them and what they were planning for the next 12 months to support their aspirations.

HOW IMPORTANT IS CAREER PROGRESSION?



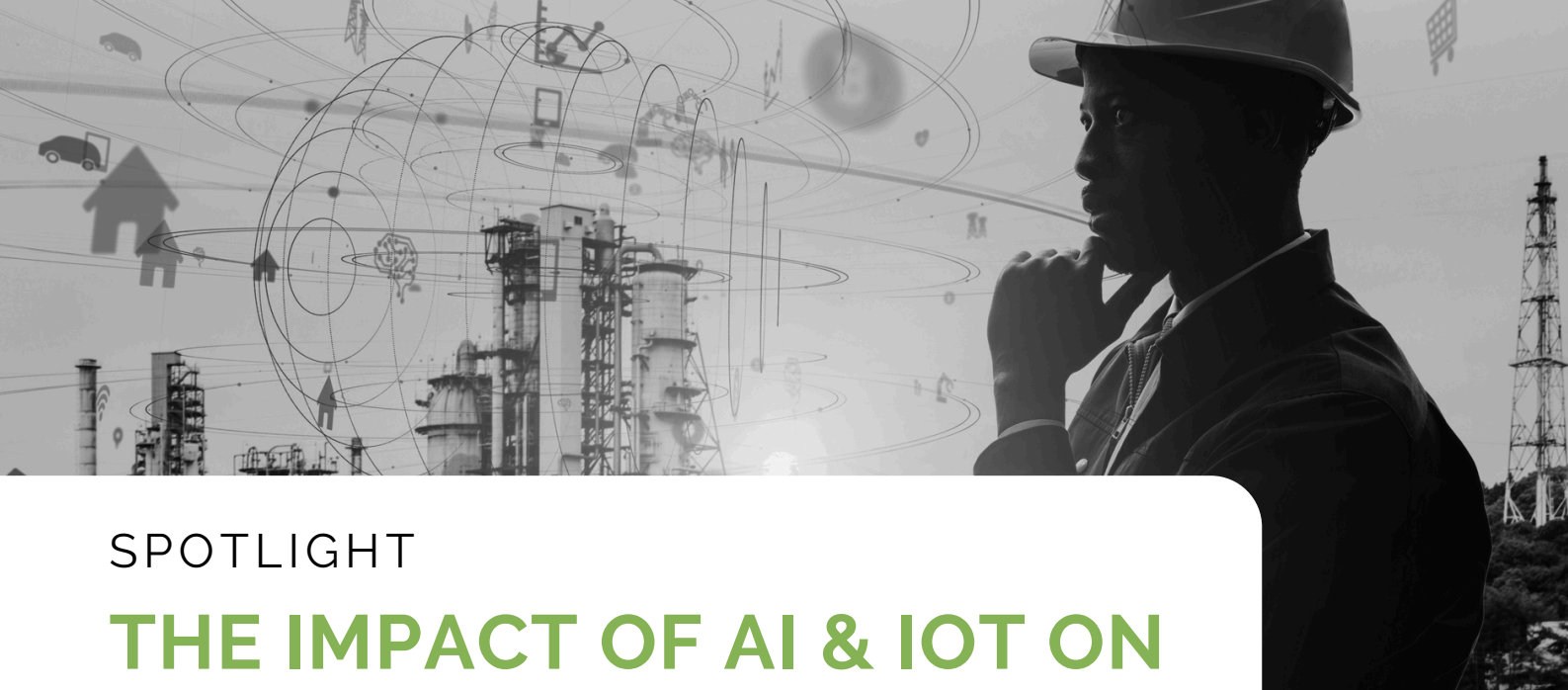
In line with a reported decrease in the percentage of respondents listing salary as a top motivator for changing jobs in 2025, career progression has also seen a slight drop in importance. In the 2025 survey, 81.2% of respondents considered career progression either "Important" or "Very Important," marking a 2.3 percentage point decline from last year.

What Areas Do You Feel You Need to Upskill In, In Order to Progress Your Career?



"Business & the Wider Market" remains the top skill identified by AM professionals as crucial for career progression, with 44% of respondents selecting it. Following closely are "People Management" at 42.9% and "AM Business Cases & Applications" at 36.2%, reflecting a continued focus on skills that support advancement into management or executive roles where people management, market acumen, and business knowledge are essential.

However, this focus on managerial skills overlooks the equally important career pathway of Individual Contributors (ICs), who bring specialized expertise and valuable insights critical to a business' success. Supporting both management and IC roles is essential for a balanced talent strategy that recognizes the unique contributions of each.



SPOTLIGHT

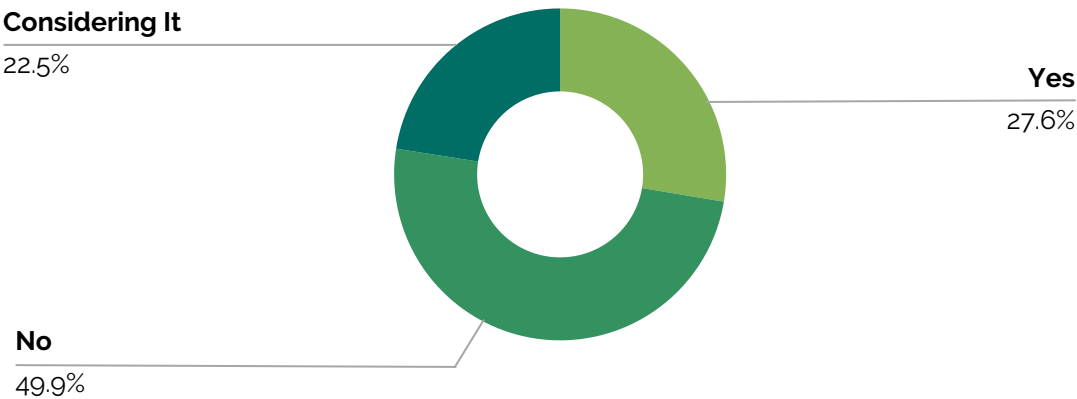
THE IMPACT OF AI & IOT ON ADDITIVE MANUFACTURING

Additive manufacturing is entering a new era, driven by the integration of artificial intelligence (AI) and the Internet of Things (IoT). These advanced technologies are redefining how manufacturers approach design, production, and quality assurance, addressing key challenges in efficiency, scalability, and customization.

AI enables smarter decision-making through machine learning and data analytics, optimizing designs, reducing errors, and enhancing product quality. IoT connects machines, systems, and operators, creating a real-time data ecosystem that enhances visibility, minimizes downtime, and ensures traceability. Together, these technologies allow manufacturers to achieve faster innovation cycles and greater operational resilience.

No longer just emerging trends, AI and IoT are now critical tools in AM, with half of participants either actively using these technologies or considering implementing them. This report segment explores primary data and firsthand insights from practitioners actively leveraging these technologies in their processes. Their experiences shed light on how AI and IoT are unlocking new efficiencies, enabling predictive maintenance, and driving novel applications in manufacturing.

DO YOU WORK WITH AI OR IOT TECHNOLOGIES?



COMMENTARY FROM EXPERTS



AVI REICHENTAL

Nexa3D: Co-Founder | CEO | Executive Chairman



Nexa3D's mission is to digitize supply chains sustainably with ultrafast polymer and metal 3D printers that deliver up to 20x productivity gains to professionals and businesses of all sizes

Visit: <https://nexa3d.com/>



As we stand at the intersection of digital transformation and advanced manufacturing, the integration of artificial intelligence (AI) and the Internet of Things (IoT) promises to reshape additive manufacturing (AM) in transformative ways. This powerful convergence opens doors to unprecedented efficiencies, new business models, and enhanced production capabilities, fundamentally altering how products are designed, manufactured, and brought to market.

AI and IoT are paving the way for a new era in AM—one where intelligence and connectivity are the backbone of an agile, scalable, and highly responsive manufacturing environment. AI's ability to derive insights from vast data pools is game-changing for AM, bringing predictive capabilities that allow manufacturers to pinpoint and solve issues before they escalate. For instance, AI-driven algorithms analyze real-time data from Nexa3D's smart printers use NexaAI to identify potential issues early on, enhancing uptime and optimizing material use.

Simultaneously, sensors embedded in equipment like Nexa3D's industrial XiP Pro 3D printers are transforming facilities into networks of smart, interconnected devices. This sensor data provides insights on everything from machine temperature and material consistency to ambient humidity levels. By feeding this real-time data to centralized platforms, AM providers and customers can monitor production remotely, ensuring quality consistency and enhancing operational transparency across global facilities.

Quality control has always been a high-stakes challenge in AM. Variations in process parameters, undetectable by the naked eye, can compromise part performance or introduce costly defects. By integrating AI-based computer vision and machine learning models with sensors, manufacturers can monitor quality dynamically, making instant adjustments to processes and ensuring final parts meet stringent specifications.

This integrated approach also brings significant cost-saving advantages. Sensors collect data on energy consumption across each production cycle, while AI algorithms identify energy optimization strategies. This reduction in energy expenditure is crucial in today's manufacturing landscape, where sustainability is as vital as operational efficiency.

AI and IoT are set to unlock an unprecedented level of customization in AM. With data-driven insights into customer preferences and specifications, manufacturers can produce highly tailored parts with shorter lead times and at scale. This capability meets the growing demand for personalized solutions across sectors like healthcare, automotive, and aerospace—where AM's ability to create unique, complex geometries is invaluable.

Moreover, AI and IoT fuel distributed production by connecting 3D printers across multiple locations and even different countries. This shift to decentralized production allows companies to rapidly adapt to local demand, minimizing logistics costs and reducing lead times. Through connected platforms, manufacturers can remotely monitor every printer, optimizing each facility in real time and seamlessly scaling up production as needed.

The fusion of AI and IoT is also empowering new service-driven business models. Take, for example, "manufacturing-as-a-service," a model where predictive maintenance ensures printers remain in optimal working order. At Nexa3D, we are exploring these models to provide our customers with consistent, reliable service that maximizes uptime while lowering maintenance costs. This shift not only saves resources but enhances reliability and value for end-users across industries.

At Nexa3D, we see this convergence as more than a trend—it's the future of AM. In the years ahead, these technologies will drive the industry toward fully autonomous production. Imagine a network of 3D printers, each equipped with self-monitoring capabilities and the ability to autonomously adjust for optimal performance without human intervention. As generative AI and digital twins mature, manufacturers will gain the tools to simulate entire production environments and streamline product development in virtual space before committing to physical builds.



Nexa3D's mission is to digitize supply chains sustainably with ultrafast polymer and metal 3D printers that deliver up to 20x productivity gains to professionals and businesses of all sizes

Visit: <https://nexa3d.com/>

The real impact of AI and IoT on AM has only just begun. At Nexa3D, we are excited to pioneer these technologies, setting new standards for agile and sustainable production. AI and IoT will allow us to manufacture the next generation of products with unparalleled precision and efficiency. The real impact of this transformation is only beginning, and we are excited to lead the charge in reimagining what's possible in AM.

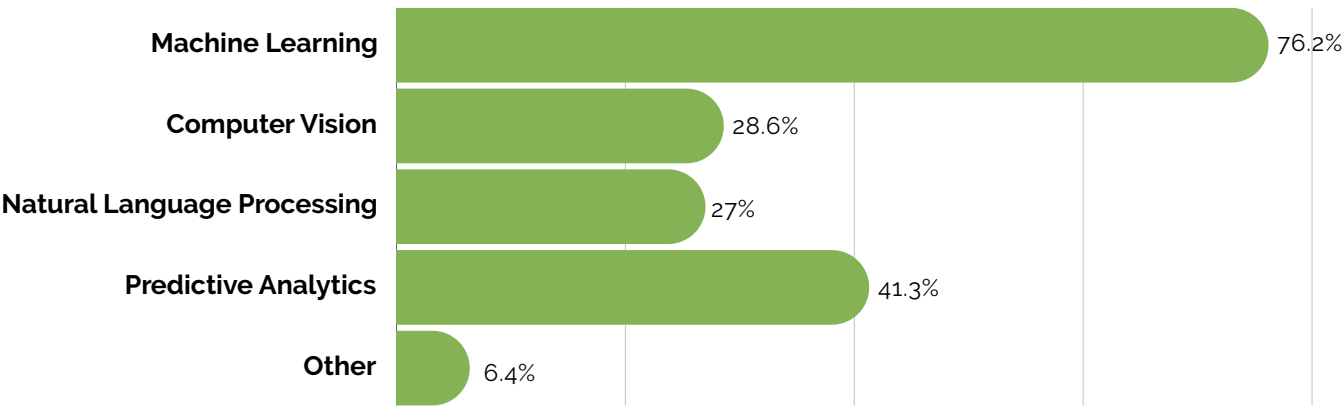


ARTIFICIAL INTELLIGENCE

AI is revolutionizing additive manufacturing by optimizing designs, enhancing material efficiency, and forecasting production outcomes through advanced machine learning and data analytics. These capabilities not only reduce errors but also drive faster innovation and elevate product quality.

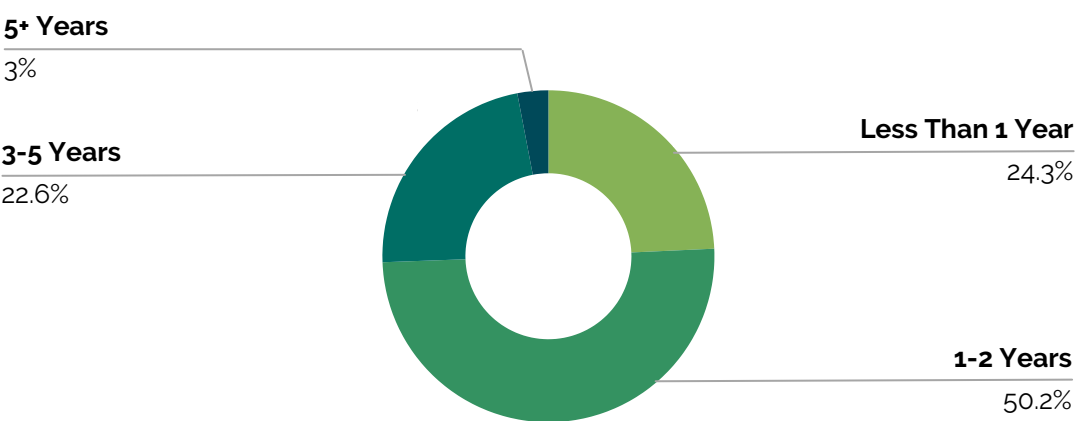
To understand where the industry is focusing its efforts, we asked participants in the 2025 AM Salary Survey about the AI technologies they currently use. The findings reveal a strong emphasis on machine learning, with 76.2% of respondents leveraging this technology to improve processes and outcomes. Predictive analytics, used by 41.3% of respondents, follows closely, highlighting its role in automating design iterations and streamlining production workflows in AM.

Which AI Technologies Are You Working With?

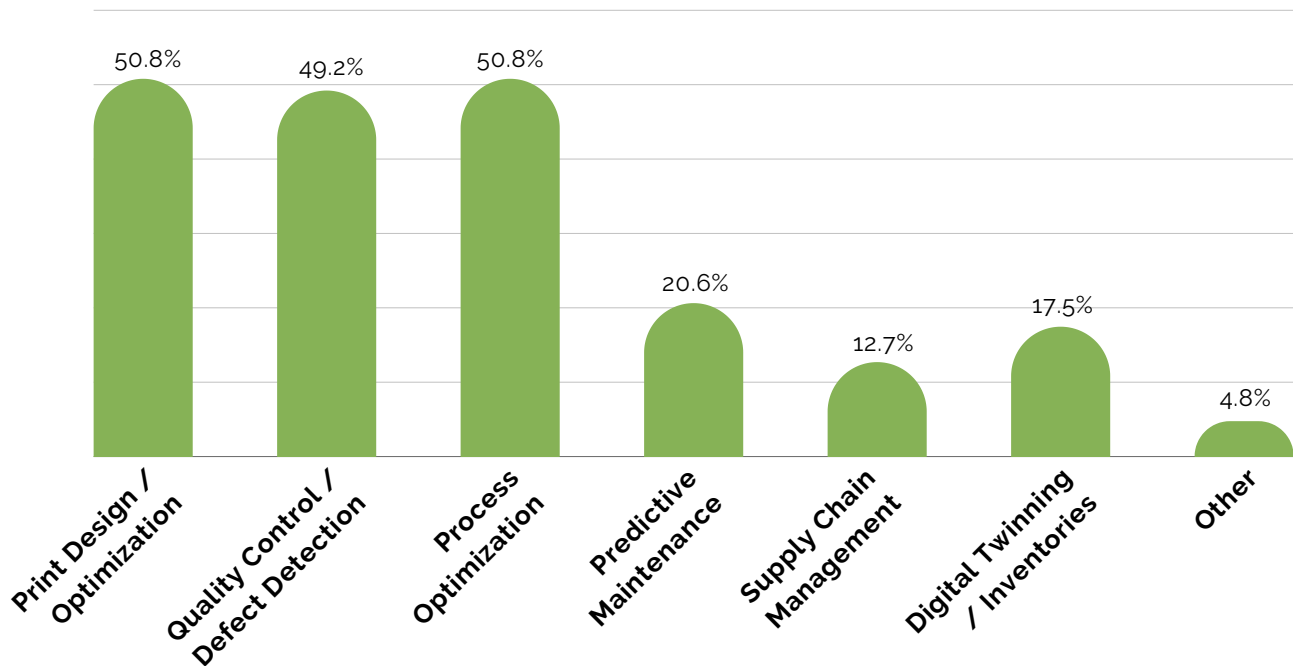


Interestingly, as highlighted in the investment trends discussed in our *Market Overview* earlier in this report, the adoption of AI applications in additive manufacturing is a relatively recent focus for the industry. This emerging priority is reflected in our survey findings, where 74.6% of respondents reported that their organizations have been utilizing AI technologies for just 0–2 years.

How Long Has Your Company Been Using AI in Additive Manufacturing?



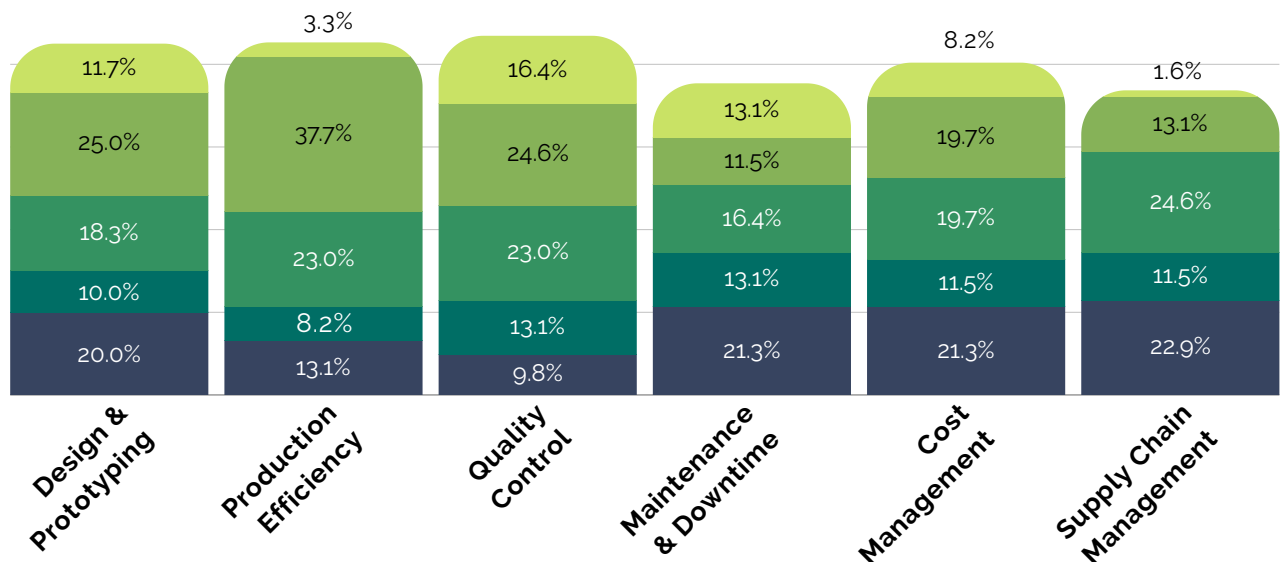
In What Areas Are You or Your Company Incorporating AI Technologies Into Your Additive Manufacturing Processes?



The primary applications of AI technologies in additive manufacturing are Print Design and Optimization, along with Process Optimization, each cited by 50.8% of respondents. These are closely followed by Quality Control and Defect Detection, identified by 49.2% of respondents. This focus aligns with the industry's ongoing effort to address critical challenges and enhance reliability - essential steps in advancing AM toward full industrialization.

On a Scale of 1-5, How Much Has the Integration of AI Impacted the Following Aspects of Your AM Processes?

● No Impact
 ● Little to No Impact
 ● Neutral
 ● Some Impact
 ● Significant Impact

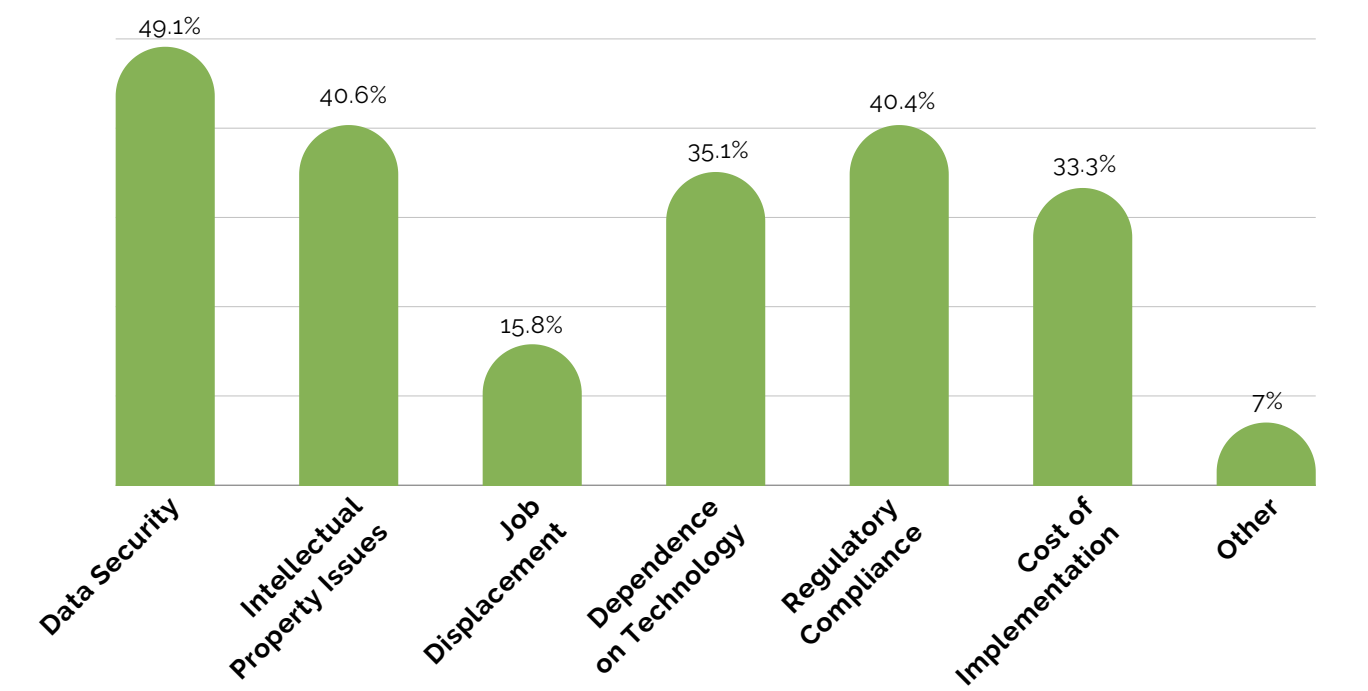


AI is significantly improving key areas of additive manufacturing, including production efficiency, quality control, and design & prototyping. By optimizing workflows, automating tasks, detecting defects in real-time, and enhancing design processes, AI is driving greater efficiency, reducing errors, and enabling faster innovation, all of which are crucial for advancing AM towards industrial-scale adoption.

The chart on the previous page highlights the top 3 areas which AI integration into AM processes has had the biggest impact so far. In particular, respondents highlighted areas such as production efficiency, quality control, and design & prototyping. Respondents reported that these areas were Somewhat Impacted or Significantly Impacted by AI at rates of 41%, 41%, and 36.7%, respectively.

In addition to the more commonly discussed areas, AI is also making a significant impact on lesser-highlighted but crucial aspects of the additive manufacturing process. By providing businesses with comprehensive oversight of the entire manufacturing lifecycle, AI enables more accurate maintenance forecasting, streamlined supply chains, and better cost control, driving efficiency and reducing operational costs.

WHAT ARE YOUR BIGGEST CONCERNS ABOUT INCORPORATING AI INTO AM PROCESSES?



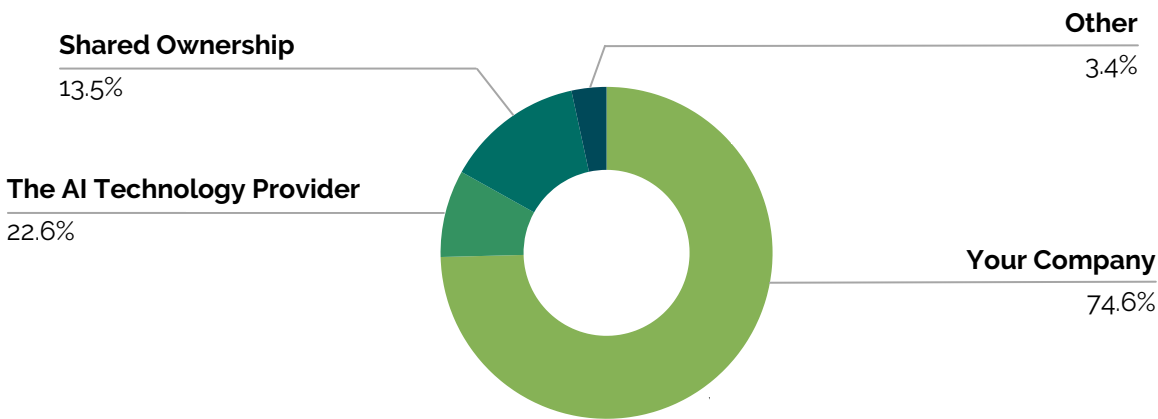
While AI holds tremendous potential for additive manufacturing, its relatively recent adoption and ongoing development of new applications bring several risks that businesses must address. The biggest concern among professionals regarding AI integration is data security, with 49.1% of respondents citing it as a primary issue. As AI relies on large volumes of data, ensuring that sensitive information remains protected from breaches or misuse is a critical challenge. Following closely are concerns about intellectual property at 40.6%, and regulatory compliance at 40.4%. These concerns highlight the need for robust strategies to mitigate risks and build trust as AI continues to reshape the industry.

DATA SECURITY

Given that data security is the top concern among professionals regarding the integration of AI into additive manufacturing, we took a closer look at the measures workplaces are currently implementing to mitigate the risks associated with data security.

When asked if they have data security policies for AI in place within their organizations, respondents shared that 53.3% did have them, 28.3% said those policies were in development, and 18.3% shared that they did not currently have policies in place.

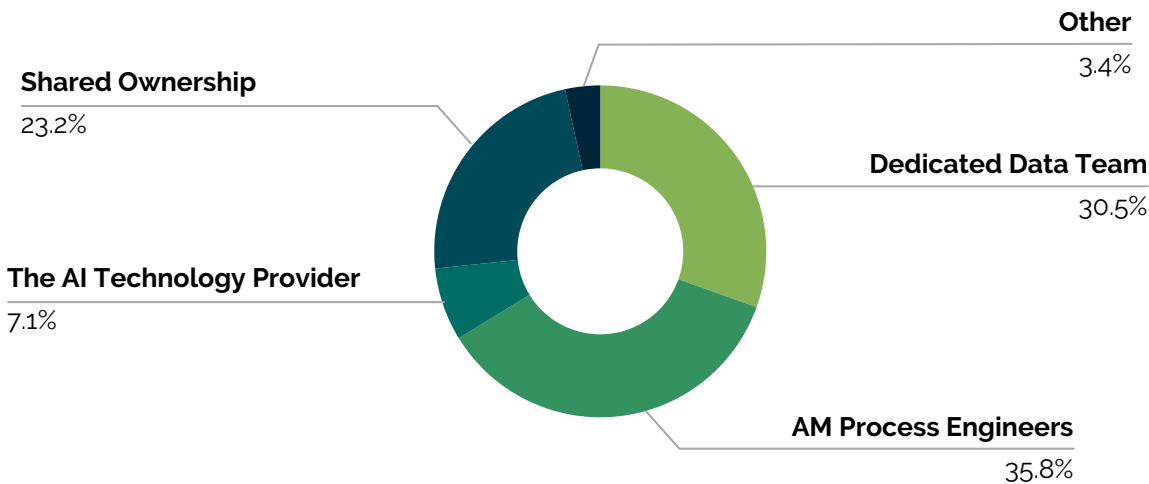
WHO OWNS THE DATA GENERATED BY AI SYSTEMS IN YOUR AM PROCESSES?



AI-generated data in additive manufacturing must be owned by one or more of the stakeholders benefiting from the technology. The majority (74.6%) of respondents indicated that their company owns all AI-generated data, regardless of whether the AI software was developed in-house or purchased from a third party. Meanwhile, 22.6% of respondents said the third-party AI provider owns the data, while 13.5% reported shared ownership.

With ownership clarified, the next important question is: where have businesses placed the responsibility for ensuring data security within their organizations?

Who is Responsible For Ensuring the Accuracy and Integrity of the Data Generated by AI in Your AM Processes?



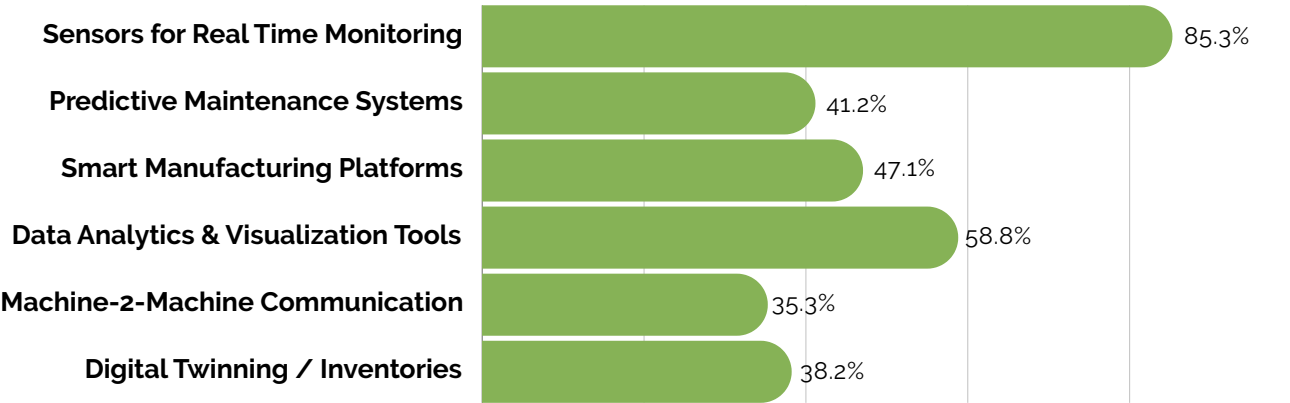
INTERNET OF THINGS (IOT)

The Internet of Things (IoT) is transforming the world of additive manufacturing, enabling real-time data exchange, improving process monitoring, and driving operational efficiency to new heights. By connecting machines and systems, IoT gives manufacturers unprecedented visibility into their workflows - helping them reduce downtime, predict maintenance needs, and ensure better quality control.

To uncover where the industry is placing its focus, we asked participants in the 2025 AM Salary Survey about the IoT technologies they're using. The results speak for themselves: 85.3% of respondents are leveraging sensors for real-time monitoring, highlighting how IoT is becoming integral in minimizing equipment failures and streamlining production.

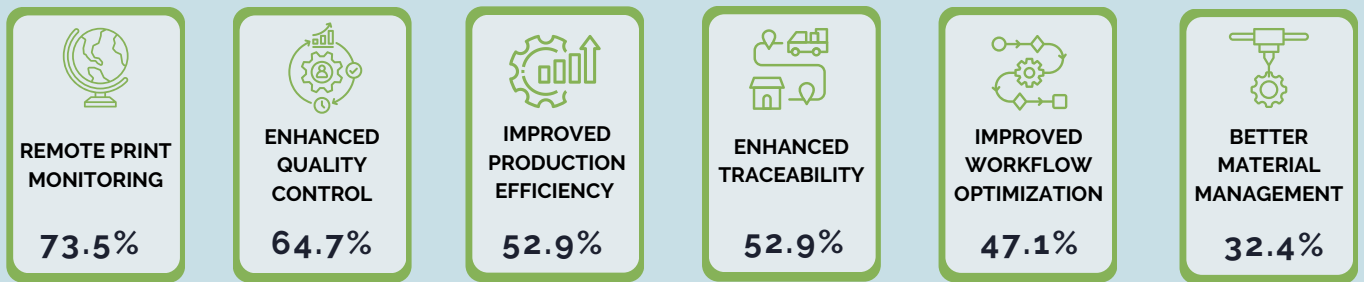
These insights reveal the growing importance of IoT in creating smarter, more efficient manufacturing environments. As IoT continues to evolve, its role in driving innovation and optimizing additive manufacturing processes is becoming clearer than ever.

WHICH IOT TECHNOLOGIES ARE YOU WORKING WITH?



Interestingly, IoT technologies have been integrated into additive manufacturing processes for a longer period than AI, which is still relatively new to the industry. While most AI users report having adopted the technology within the past 0-2 years, 41.2% of IoT users have been utilizing it for 3-5 years, and 20.6% have been using it for over 5 years. In contrast, only 17.7% of respondents said they had been using IoT for less than a year. This suggests that IoT technologies are far more established within the additive manufacturing industry, with more mature applications and greater familiarity among users compared to AI.

What Are the Primary Benefits You Have Experienced by Incorporating IoT into Your AM Processes?

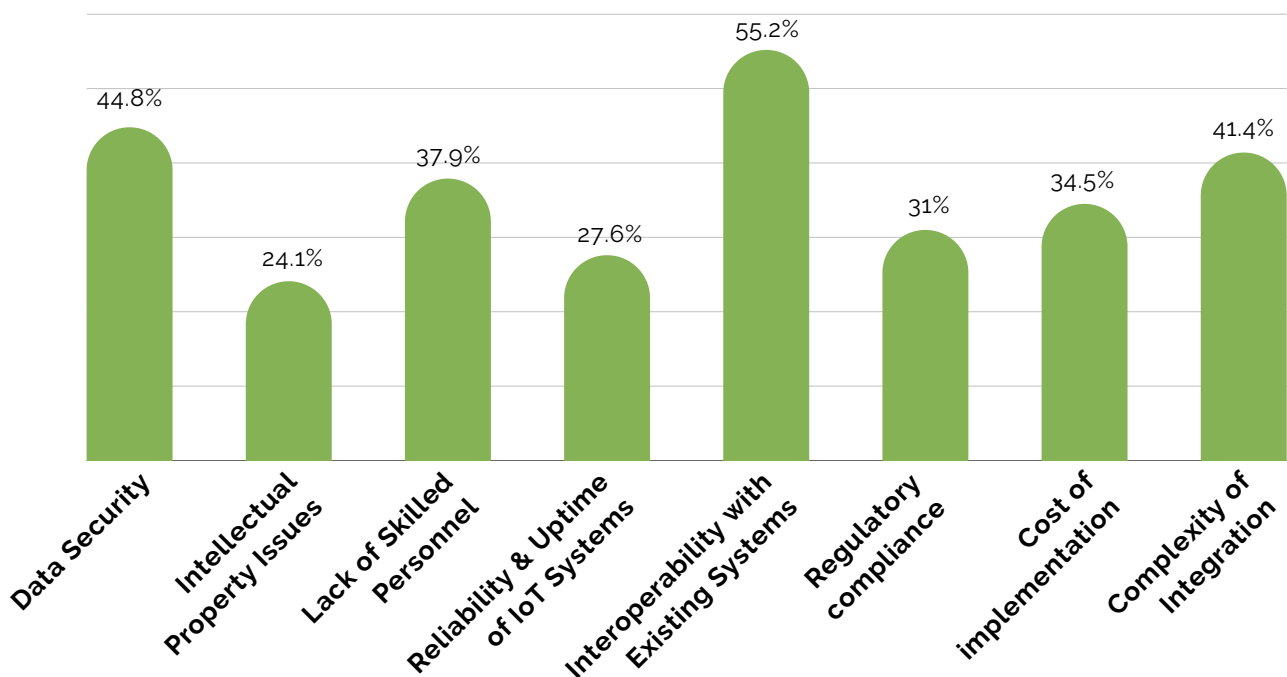


Remote Print Monitoring emerged as the leading benefit of incorporating IoT technologies into additive manufacturing processes, with 73.5% of respondents highlighting it as a top advantage. This capability has enabled businesses, such as contract manufacturers, to establish print farms in remote locations where operating costs are lower or supply chain logistics are more favorable.

Other major benefits include Quality Control (64.7%), Production Efficiency (52.9%), and Enhanced Traceability (52.9%), underscoring IoT's role in improving precision, streamlining workflows, and ensuring better oversight across the manufacturing process.

Additionally, participants mentioned several other advantages, such as Cost Savings (29.4%), Improved Supply Chain Management (20.6%), and Greater Sustainability and Energy Efficiency (20.6%). These findings demonstrate how IoT technologies have driven progress in the AM industry, enabling businesses to optimize operations, reduce environmental impact, and adapt to evolving market demands.

What Are Your Biggest Concerns About Incorporating IoT into AM Processes?

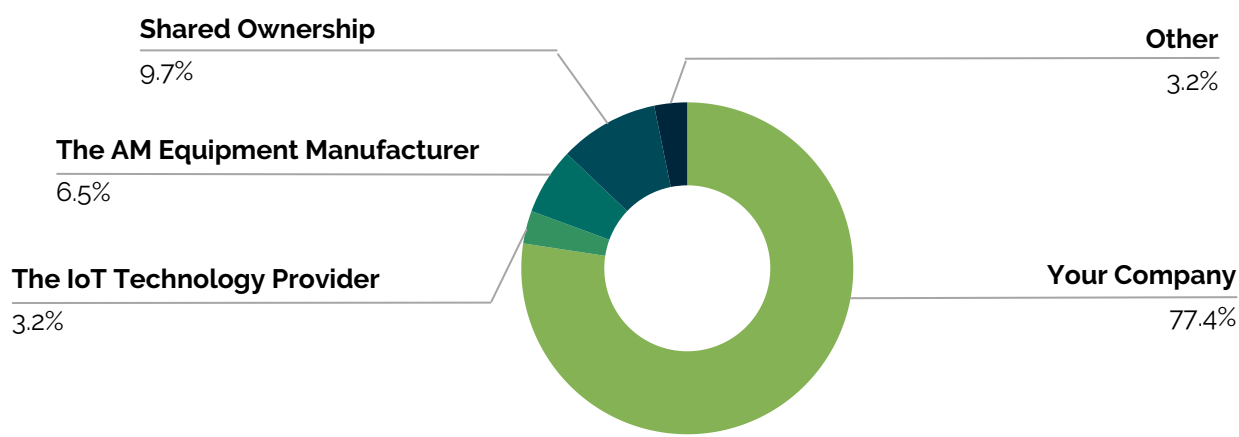


DATA SECURITY

The top concern highlighted by professionals using IoT technologies in additive manufacturing is interoperability with existing systems, cited by 55.2% of respondents. This reflects the challenges businesses face in integrating IoT solutions seamlessly into their current infrastructure. The second most pressing issue, mirroring concerns seen with AI adoption, is data security, identified by 44.8% of respondents.

Given the parallels with AI, we also sought to understand how businesses are addressing data security challenges to protect the sensitive information generated by IoT systems during the manufacturing process.

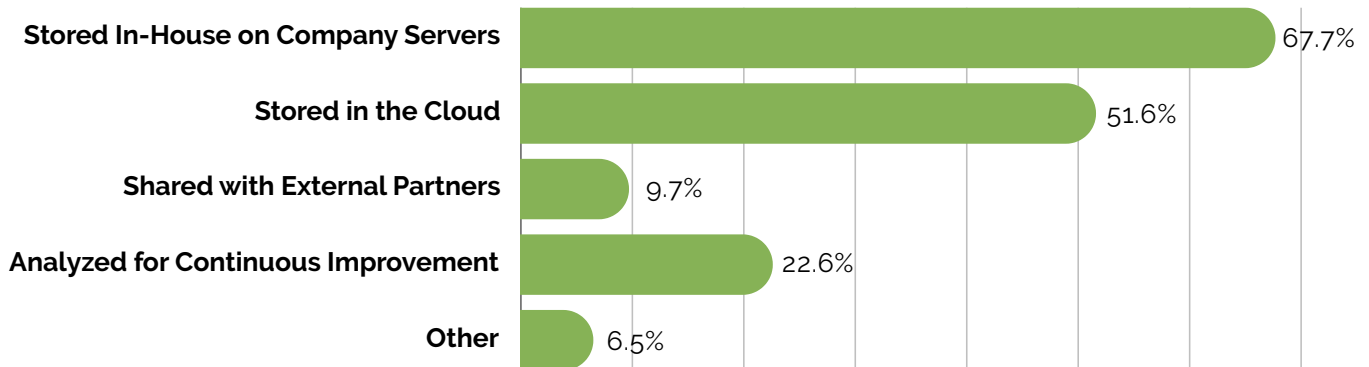
WHO OWNS THE DATA GENERATED BY IOT SYSTEMS IN YOUR AM PROCESSES?



Similar to AI systems, the majority of respondents (77.4%) indicated that the company utilizing the IoT system retains ownership of the data generated. However, when it comes to IoT, an interesting dynamic emerges: 6.5% of respondents reported that ownership of the data lies with the additive manufacturing equipment manufacturer - particularly when IoT functionality is embedded within their solutions.

This raises an important question: should service providers or equipment manufacturers have a stake in data ownership, or should ownership rest exclusively with the end users? As IoT technologies continue to evolve, clarifying data ownership will be critical to ensuring transparency and fostering trust across the industry.

How Does Your Organization Handle the Data Generated by IoT Technologies in AM Processes?

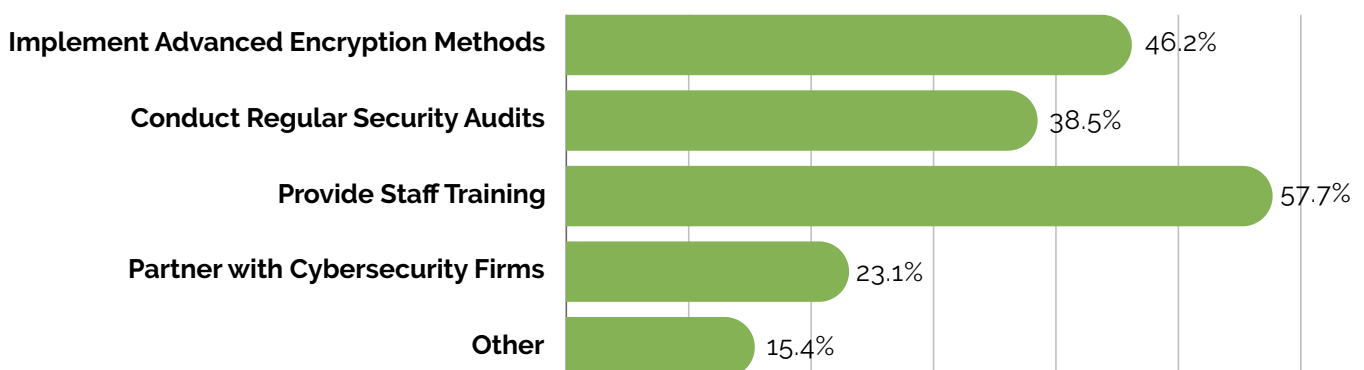


IoT systems generate vast amounts of data, making secure storage a cornerstone of data security. Survey results reveal that 67.7% of respondents store manufacturing data on in-house company servers, while 51.6% use cloud storage, showcasing a hybrid approach to data management.

When addressing data ownership and usage policies, 56.2% of respondents confirmed their organizations have clear policies in place, with another 31.3% actively developing them. However, 12.5% acknowledged they currently lack formal policies.

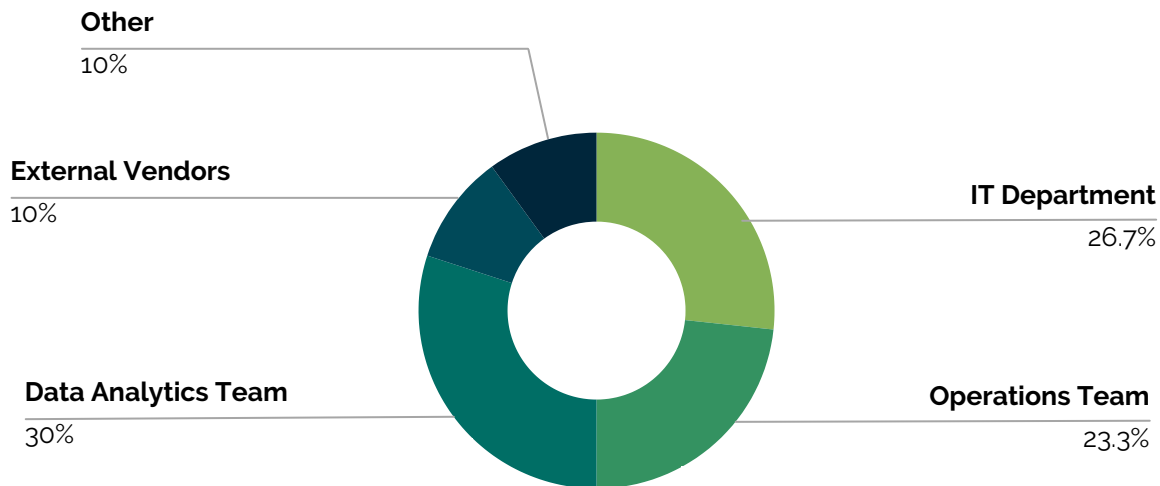
This proactive approach to data governance likely explains why 62.5% of respondents reported they are not significantly concerned about data security when using IoT in AM processes. These findings suggest that as businesses refine their policies and strengthen their data management strategies, confidence in IoT-enabled manufacturing continues to grow.

What Steps Has Your Organization Taken to Mitigate the Risks Associated with IoT in AM Processes?



It's reassuring to see that businesses are also actively investing in solutions to mitigate the risks associated with IoT in AM processes. 57.7% of respondents reported that their organizations provide staff training on handling IoT data and ensuring data security. Additionally, many are adopting advanced encryption methods (46.2%) and conducting regular security audits (38.5%) to strengthen their defenses. These efforts highlight a proactive approach to safeguarding sensitive information and building trust in IoT-enabled manufacturing.

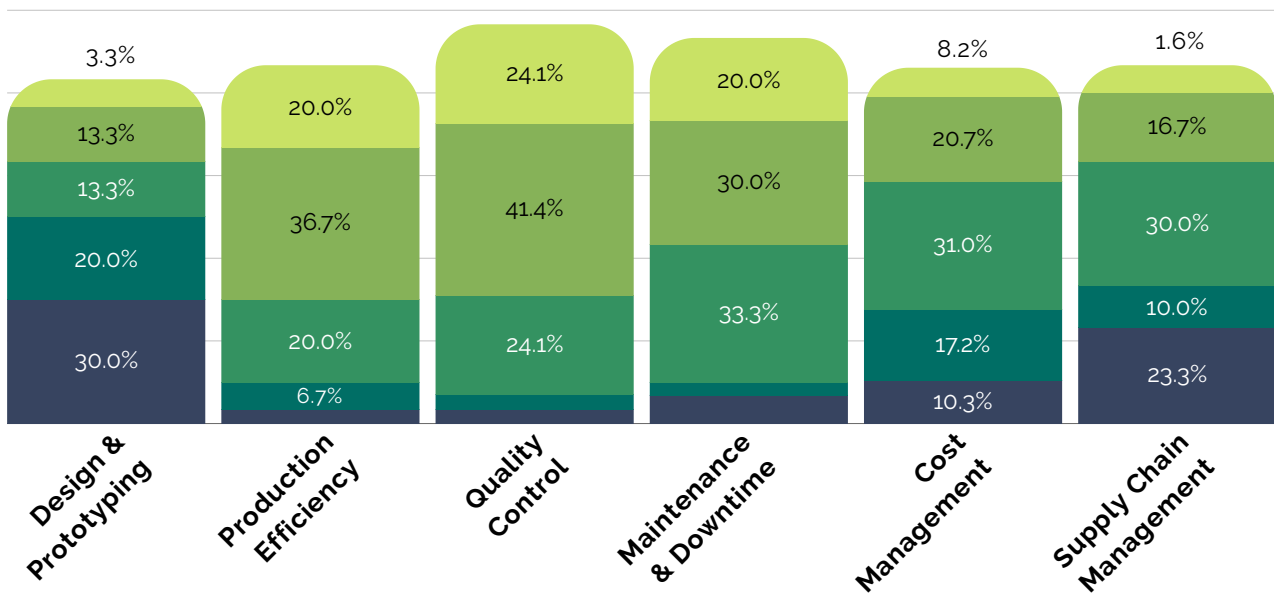
Who in Your Organization is Responsible for the Data Generated by IoT Devices in AM Processes?



Compared to AI, responsibility for IoT data more often falls to dedicated Data Analytics teams, as indicated by 30% of respondents. This is unsurprising given the sheer volume and complexity of data generated by IoT technologies, which requires specialized expertise to analyze, manage, and derive actionable insights effectively.

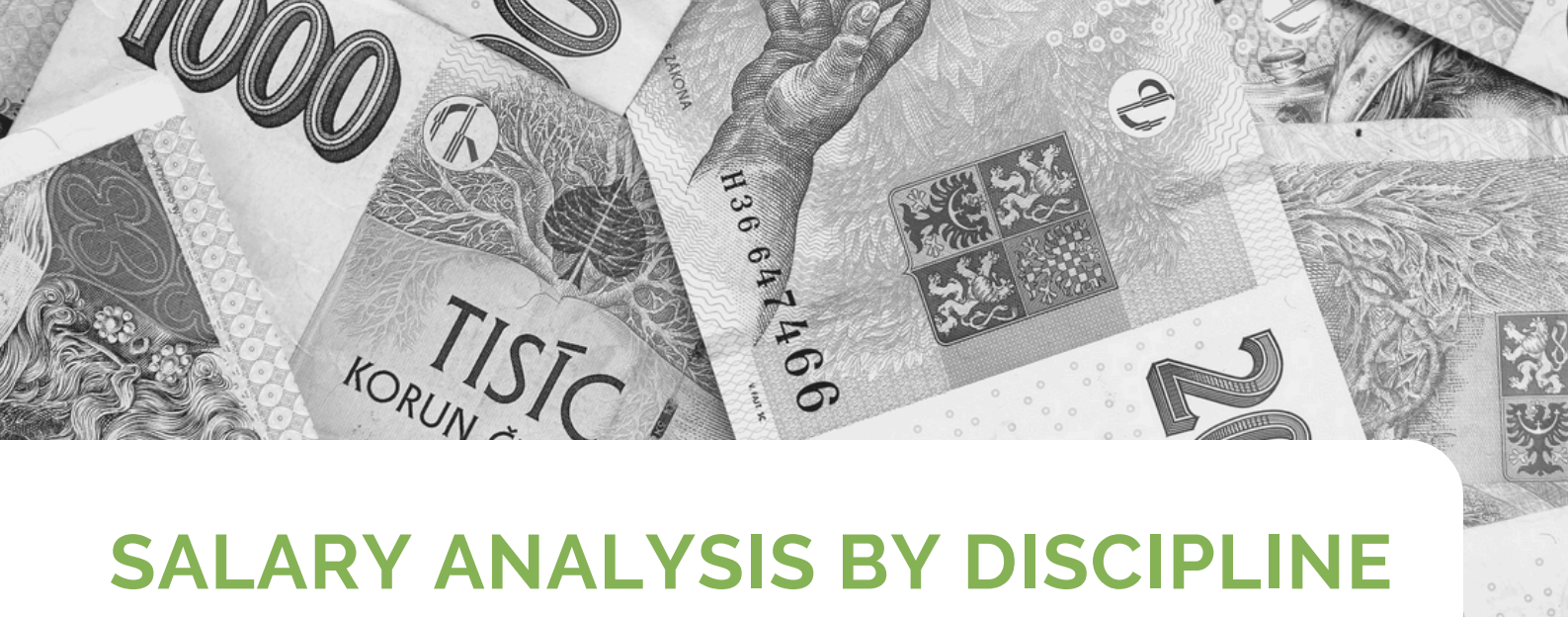
On a Scale of 1-5, How Much Has the Integration of IoT Impacted the Following Aspects of Your AM Processes?

● No Impact
 ● Little to No Impact
 ● Neutral
 ● Some Impact
 ● Significant Impact



Unsurprisingly, quality control emerged as the area most impacted by the integration of IoT technologies into manufacturing processes, with 65.5% of respondents stating that IoT either somewhat impacts or significantly impacts this aspect.

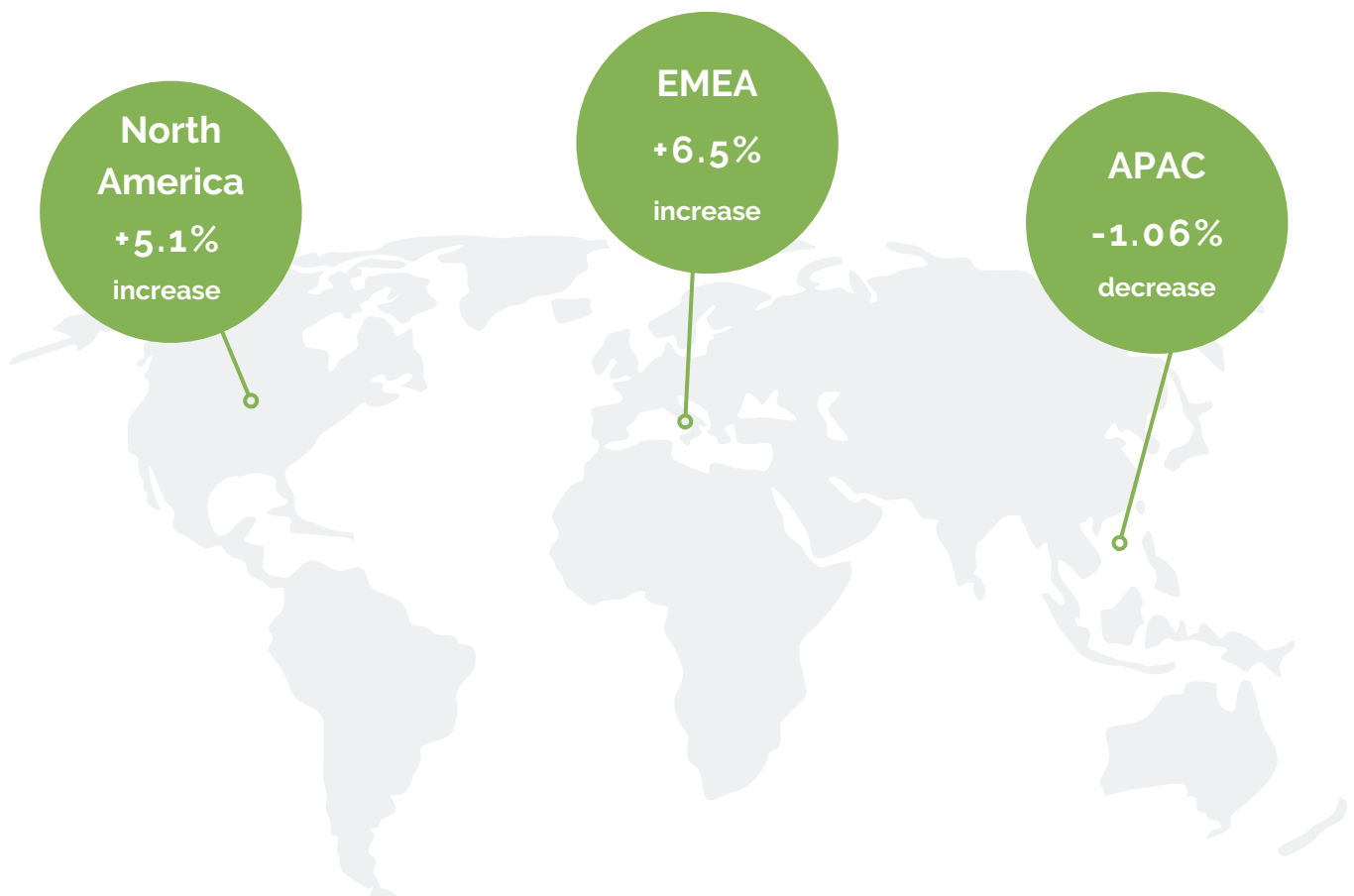
By enabling real-time monitoring, defect detection, and enhanced traceability, IoT is driving advancements that address long-standing quality challenges in the industry. This transformative potential explains the technology's growing popularity in recent years as a key application within additive manufacturing.



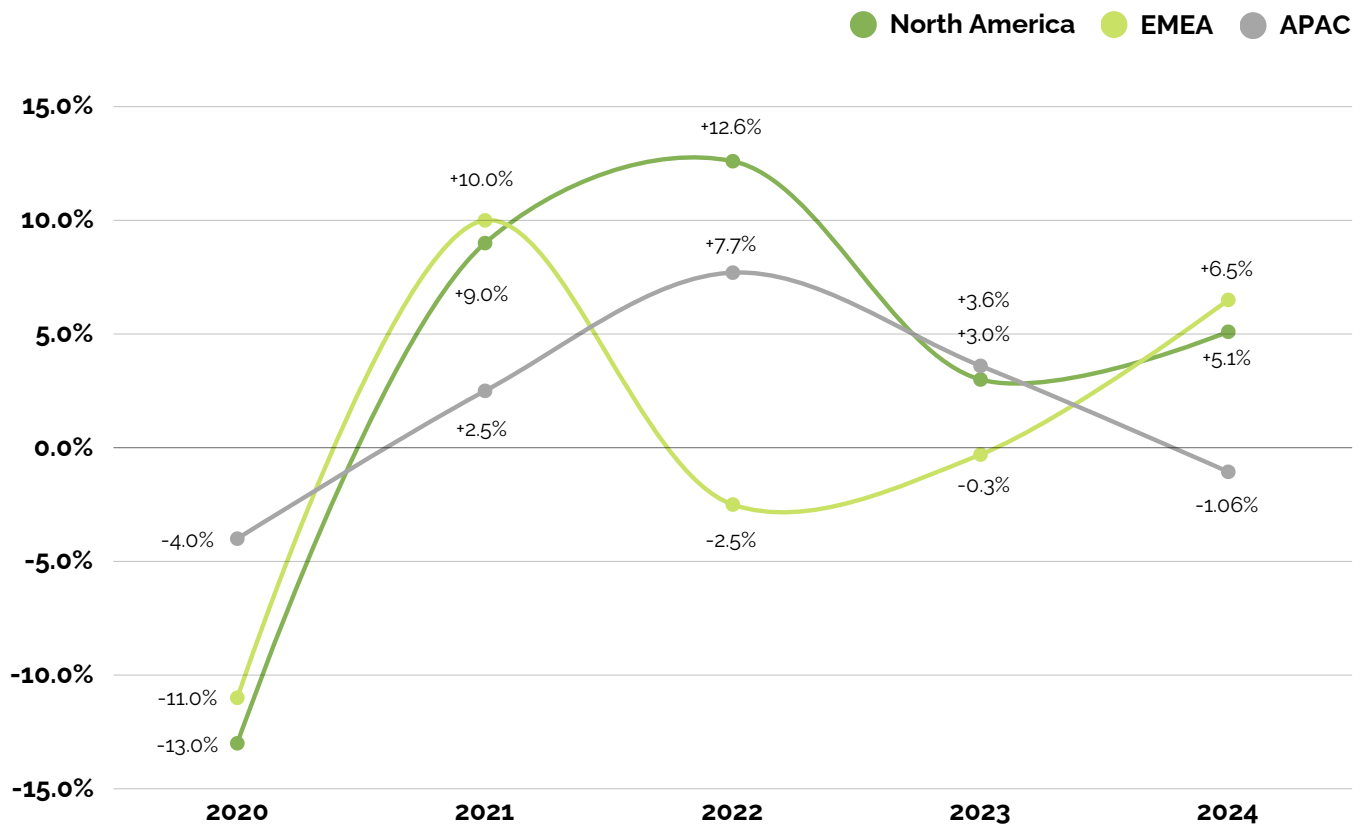
SALARY ANALYSIS BY DISCIPLINE

In order to provide a clear picture of how the AM market is evolving, we have focused in on the key job disciplines to be found in the AM industry, reviewed the trends and compared the salaries across the world, across different locations, seniorities and disciplines. The indicated salaries are base salaries only, and **do not include commissions**.

DIFFERENCES IN AVERAGE SALARIES ACROSS ALL DISCIPLINES AND LEVELS OF SENIORITY, 2023 - 2024



SALARY ANALYSIS



2024 saw mixed fortunes for the growth of salaries across the various regions. North America, including Canada, saw a marginal improvement from the 3% growth last year, achieving 5.1%. EMEA saw the greatest change achieving a positive growth of 6.5%, compared to the past two years of negative growth. APAC continued its downward trend, realising an overall salary decrease of 1%. Arguably what we are seeing happening here is a degree of normalisation of salaries within the industry. With inflation falling, salary growth of between 5-6% a year, is what we would expect to see under normal market conditions.

As is often the case we see major differences in salary growth between regions, but most noticeably between disciplines. For the last couple of years, the growth of salaries for sales professionals has led the way, as the drive to sell new systems and competition for talent, pushed up salaries. This year, the disciplines which saw the greatest growth overall were Applications & Consulting (8.2%) and R&D & Engineering (6.6%). This reflects a greater drive towards leveraging existing technology, developing new applications and maximising performance from AM Technology. In all regions, including APAC, salaries for Application & Consulting roles grew, which is not true of any other discipline, where in some regions salaries fell marginally.

EMEA saw the largest growth in salaries for Applications & Consulting, growing by 15.8%. North America saw the highest growth of salaries for R&D & Engineering, increasing by 10.5%. In all disciplines apart from Applications & Consulting, salaries fell slightly in APAC. Headwinds in the Chinese economy are clearly being felt throughout the entire region as

both demand for talent and therefore salaries falls. Notably, there has been no growth in the workforce in the region either. Therefore, we might expect salaries to start to tick back up again, as market conditions improve and demand for talent increases.

Last year salaries in Software fell across the board, which was surprising, given the relatively consistent demand for talent, although the wider tech market was in turmoil. This year, APAC apart, salaries in Software have grown again in EMEA (2.2%) and North America (7.2%). Notably this year, one discipline which has not seen much growth at all is Marketing. Salaries in EMEA have grown by only 0.6%, in North America they grew slightly more at 3.2%, and in APAC they have fallen by 0.2%. Muted demand for talent in marketing is potentially one reason for this. As is often the case when market and economic conditions tighten, marketing budgets are the first to be squeezed.

”

NICK PEARCE

Founder & Director

Alexander Daniels Global

The analyses below are based on average salaries across all levels of seniority, and compares data collected in the 2025 AM Salary Survey with data reported in the 2024 AM Salary Survey Report.

EMEA SALARY TRENDS

EMEA

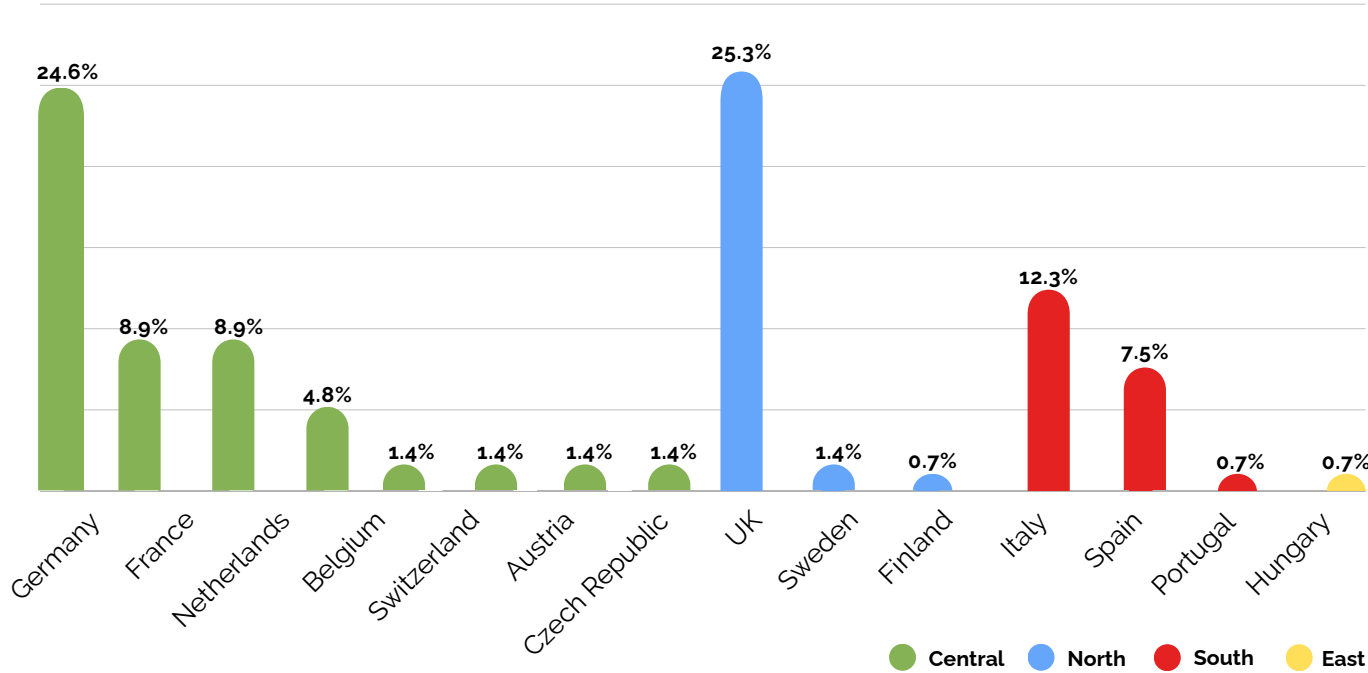
Average Salaries Differences, Across Seniority Levels, in 2024

APPLICATION & CONSULTING	+15.8%	R&D AND ENGINEERING	+7.1%
SERVICE	+4.9%	MARKETING	+0.5%
SALES	+8.04%	SOFTWARE	+2.1%

ALL EMEA SALARIES SEE AN INCREASE IN 2024

The average salaries across all disciplines have increased in 2024. This is a stark difference to recent years where we reported some salaries across EMEA struggling to see increases.

Distribution of Participants From EMEA



This year, we've added a breakdown of participant distribution across EMEA to give more context to the reported salaries in each discipline. A higher proportion of respondents from high-cost regions may skew salary data upward. However, the salary ranges provided on the following pages can be interpreted as follows: lower quartiles generally reflect salaries in lower-cost areas, while upper quartiles represent salaries in higher-cost regions within EMEA.

NORTH AMERICA & CANADA SALARY TRENDS

NORTH AMERICA

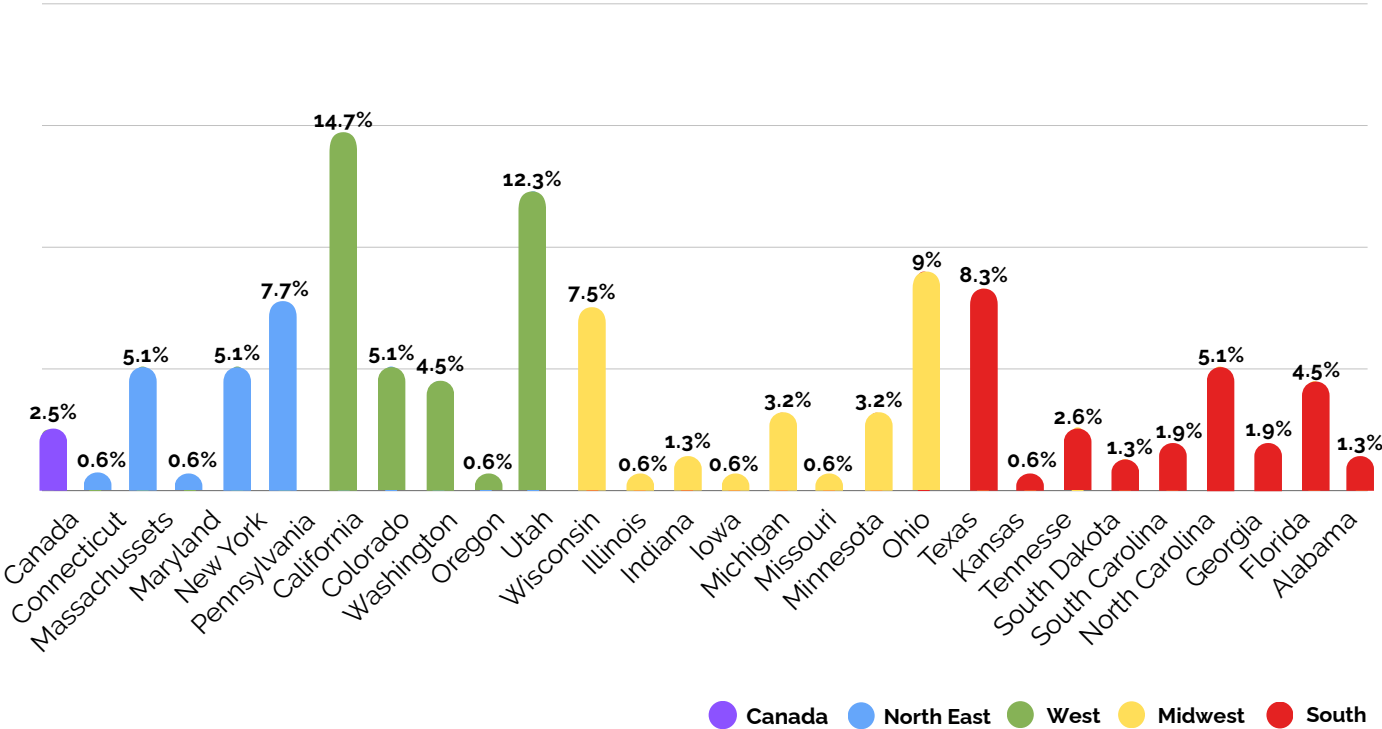
Average Salaries Differences, Across Seniority Levels, in 2024

APPLICATION & CONSULTING	+4.5%	R&D AND ENGINEERING	+10.5%
SERVICE	+3.1%	MARKETING	+3.2%
SALES	+1.2%	SOFTWARE	+7%

LARGEST INCREASE IN R&D AND ENGINEERING

The average R&D and Engineering salaries in North America & Canada have seen a 10.5% increase on the previous year, marking the most significant increase on the continent throughout 2024.

Distribution of Participants From North America



This year, we've added a breakdown of participant distribution across North America and Canada to give more context to the reported salaries in each discipline. A higher proportion of respondents from high-cost regions may skew salary data upward. However, the salary ranges provided on the following pages can be interpreted as follows: lower quartiles generally reflect salaries in lower-cost areas, while upper quartiles represent salaries in higher-cost regions within North America and Canada.

APAC SALARY TRENDS

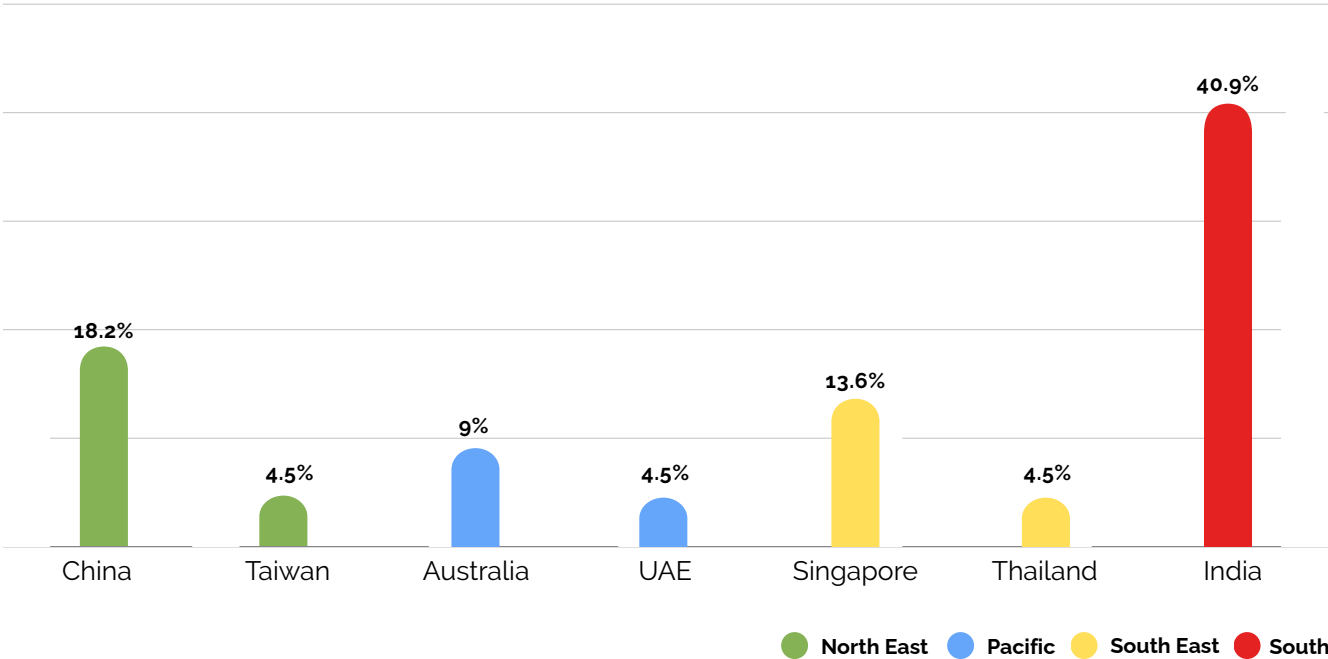
APAC
Average Salaries Differences, Across Seniority Levels, 2023 - 2024

APPLICATION & CONSULTING	+7.1%	R&D AND ENGINEERING	-0.2%
SERVICE	-4.9%	MARKETING	-0.1%
SALES	-4.9%	SOFTWARE	-2.6%

APAC SALARIES SEE NET DECREASES ACROSS THE BOARD

APAC salaries have always been behind when compared with its EMEA and North American counterparts. However, this year, we see a further decrease in salaries overall when compared with last year while its counterparts see an uplift in salaries throughout 2024. This may in part be driven by an increase in participants from India this year, where salaries are significantly lower when compared with salaries in the North East or Pacific regions.

Distribution of Participants From APAC



This year, we've added a breakdown of participant distribution across APAC to give more context to the reported salaries in each discipline. A higher proportion of respondents from high-cost regions may skew salary data upward. However, the salary ranges provided on the following pages can be interpreted as follows: lower quartiles generally reflect salaries in lower-cost areas, while upper quartiles represent salaries in higher-cost regions within APAC.

SERVICE ENGINEERING

A business can successfully develop, market, and sell a fantastic technology product, but this is just the beginning of the customer relationship. Proper installation, functionality, and consistent maintenance are essential, as product breakdowns can significantly impact customer productivity and erode trust in the supplier.

The Service Team offers vital support to both internal and external customers by leveraging their expertise in additive manufacturing equipment. Their primary focus is on field installation, including mechanical setup, electrical hook-up, precision alignment, maintenance, and repair, while also establishing customer network interfaces. Additionally, the Service Team provides technical phone support, troubleshoots electrical, software, and mechanical issues, and trains customers on system usage.

TYPE OF ROLES & RESPONSIBILITIES

- **Field Service Engineer:** Installs, maintains, and repairs equipment at customer locations while providing technical support and training.
- **Field Service Technician:** Diagnoses and resolves technical issues on-site, performs routine maintenance, and ensures customer satisfaction with equipment performance.
- **Service Director:** Oversees the service department, develops service strategies, and manages the team to ensure high-quality customer support and operational efficiency.
- **Maintenance Engineer:** Implements preventive maintenance programs, troubleshoots equipment issues, manages spare parts inventory, and analyzes performance data for improvements.
- **Technical Service Engineer:** Provides technical support and solutions for customers, collaborates with sales and engineering teams, and develops documentation to assist with product understanding.

SALARY ANALYSIS

+0.8% increase in average salaries, across all regions and seniorities within Service Engineering

+4.9%

increase in average salaries, across seniorities in **EMEA**

+3.1%

increase in average salaries, across seniorities in **North America**

-4.8%

decrease in average salaries, across seniorities in **APAC**

SERVICE ENGINEERING SALARY BENCHMARKS

		Junior (Entry Level) 0-2 Years Experience	Senior (Experienced) 2-5 Years Experience	Manager (Lead or Manager) 5-10 Years Experience	Senior Manager / Head of Department (Senior Level Experienced) 10-15 Years Experience	Director / VP (Founder or Executive Level) +15 Years Experience
EMEA	Min	€ 26,500	€ 35,000	€ 40,000	€ 55,000	€ 95,000
	Average	€ 35,785	€ 53,264	€ 73,303	€ 92,111	€ 120,909
	Max	€ 55,000	€ 75,000	€ 91,000	€ 120,000	€ 200,000
NORTH AMERICA & CANADA	Min	\$ 50,000	\$ 65,000	\$ 94,000	\$ 114,000	\$ 140,000
	Average	\$ 63,339	\$ 90,744	\$ 111,571	\$ 139,444	\$ 166,500
	Max	\$ 84,000	\$ 127,200	\$ 134,000	\$ 175,000	\$ 195,000
APAC	Min	\$ 35,000	\$ 46,500	\$ 55,000	\$ 65,000	\$ 160,000
	Average	\$ 44,777	\$ 58,111	\$ 75,625	\$ 118,000	\$ 190,000
	Max	\$ 68,000	\$ 80,000	\$ 110,000	\$ 190,000	\$ 220,000

*All salaries are base salaries and do not include bonuses or benefits

** APAC salaries are in US Dollars (\$)

GLOBAL DISTRIBUTION OF SERVICE ENGINEERING SALARIES

The below table and chart show the distribution of service engineering salaries across EMEA, North America and APAC, providing our readers with a way of understanding how salaries are distributed across seniorities in the market.

		SENIORITY	MINIMUM	LOWER QUARTILE	MEAN	UPPER QUARTILE	MAXIMUM
Salary	EMEA	Junior	€26,500	€29,500	€35,786	€41,375	€55,000
		Senior	€35,000	€46,500	€53,265	€60,000	€75,000
		Manager	€40,000	€64,875	€73,304	€84,750	€91,000
		Senior Manager	€55,000	€77,500	€92,111	€105,000	€120,000
		Director / VP	€95,000	€100,000	€120,909	€125,000	€200,000
	North America	Junior	\$50,000	\$53,685	\$63,339	\$71,000	\$84,000
		Senior	\$65,000	\$80,000	\$90,744	\$102,000	\$127,200
		Manager	\$94,000	\$103,000	\$111,571	\$118,500	\$134,000
		Senior Manager	\$114,000	\$129,000	\$139,444	\$147,850	\$175,000
		Director / VP	\$140,000	\$154,250	\$166,500	\$183,750	\$195,000
	APAC	Junior	\$26,000	\$35,000	\$41,964	\$48,750	\$67,000
		Senior	\$32,500	\$46,500	\$53,385	\$65,000	\$80,000
		Manager	\$46,000	\$65,000	\$73,550	\$83,375	\$110,000
		Senior Manager	\$65,000	\$94,000	\$107,111	\$120,000	\$190,000
		Director / VP	\$125,375	\$165,000	\$186,729	\$215,000	\$235,000



MARKETING

Developing a good product is one thing and having a good sales team in place to sell it is another but of equal importance is ensuring that the product is positioned correctly, targeted towards the right end user and is supported with marketing material to help sell the features and benefits.

The marketing team plays an early role in new product development initially by identifying key gaps within the market that new technology could service. Once a new product has been created they will be responsible for developing the go-to-market strategy alongside Sales and Business Development and will then implement the marketing plans to support the strategy.

TYPE OF ROLES & RESPONSIBILITIES

- **Marketing Manager:** Develops and executes marketing strategies to promote products and services, increasing brand awareness and market presence.
- **Product Manager:** Manages the product lifecycle for AM technologies, from concept to launch, ensuring alignment with market needs and business goals.
- **Technical Marketing Specialist:** Creates clear materials that explain the benefits and capabilities of AM technologies to educate clients and support sales.
- **Content Marketing Manager:** Creates and curates content that educates customers about AM technologies, showcasing their benefits and applications through various channels.
- **Brand Manager:** Responsible for developing and maintaining the brand identity of AM products, ensuring consistent messaging and positioning in the market.
- **Product Marketing Manager:** Focuses on positioning and promoting specific AM products, working closely with sales and engineering teams to communicate value propositions.
- **Marketing Director:** Oversees all marketing strategies and initiatives, guiding the team to promote AM technologies and drive business growth.

SALARY ANALYSIS

+1.3%

increase in average salaries, across all regions and seniorities within Marketing.

+0.5%

increase in average salaries, across seniorities in **EMEA**

+3.2%

increase in average salaries, across seniorities in **North America**

-0.2%

decrease in average salaries, across seniorities in **APAC**

MARKETING SALARY BENCHMARKS

		Junior (Entry Level) 0-2 Years Experience	Senior (Experienced) 2-5 Years Experience	Manager (Lead or Manager) 5-10 Years Experience	Senior Manager / Head of Department (Senior Level Experienced) 10-15 Years Experience	Director / VP (Founder or Executive Level) +15 Years Experience
EMEA	Min	€ 24,000	€ 36,000	€ 38,000	€ 50,000	€ 97,500
	Average	€ 35,250	€ 57,000	€ 80,710	€ 94,000	€ 127,583
	Max	€ 52,000	€ 94,000	€ 120,000	€ 135,000	€ 185,000
NORTH AMERICA & CANADA	Min	\$ 40,000	\$ 55,000	\$ 90,000	\$ 115,000	\$ 120,000
	Average	\$ 49,865	\$ 71,314	\$ 128,668	\$ 148,005	\$ 163,731
	Max	\$ 66,000	\$ 90,000	\$ 180,000	\$ 200,000	\$ 255,000
APAC	Min	\$25,000	\$ 32,000	\$ 46,500	\$ 73,600	\$ 140,000
	Average	\$ 39,167	\$ 50,685	\$ 79,813	\$ 128,657	\$ 171,400
	Max	\$55,000	\$ 75,000	\$110,000	\$ 180,000	\$ 210,000

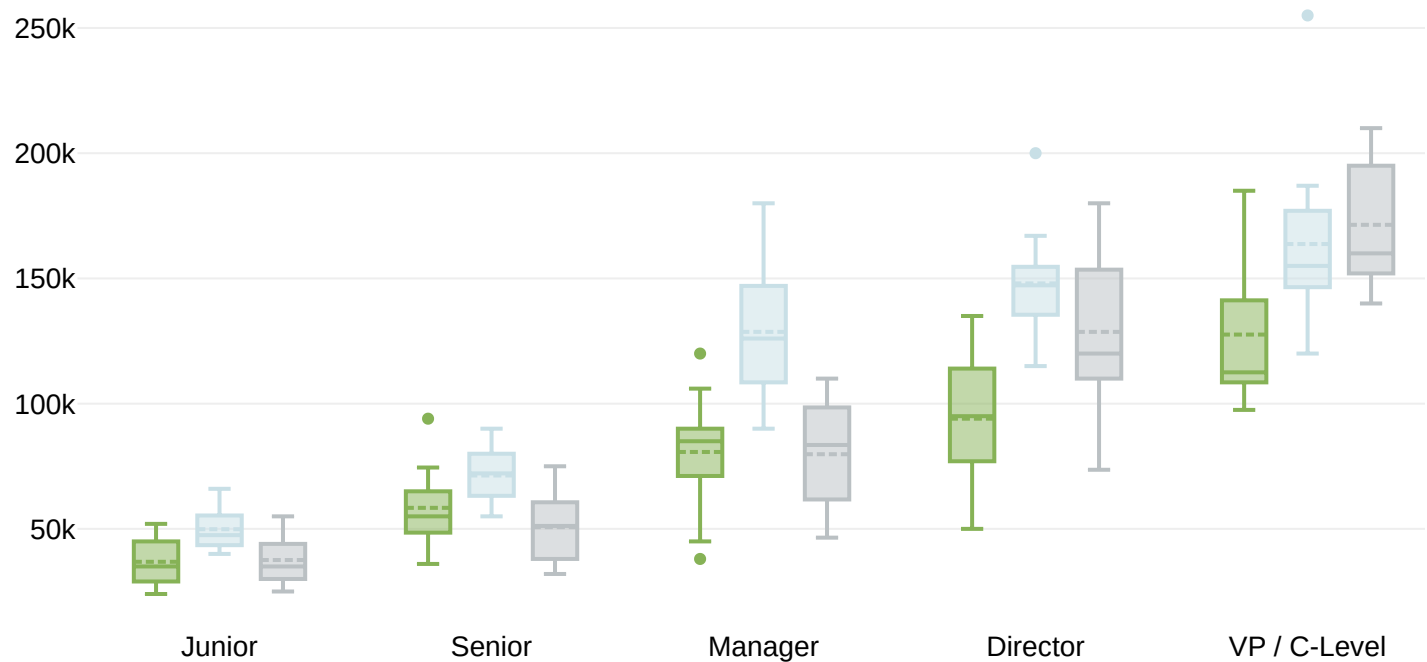
*All salaries are base salaries and do not include bonuses or benefits

** APAC salaries are in US Dollars (\$)

GLOBAL DISTRIBUTION OF MARKETING SALARIES

The below table and chart show the distribution of marketing salaries across EMEA, North America and APAC, providing our readers with a way of understanding how salaries are distributed across seniorities in the market.

		SENIORITY	MINIMUM	LOWER QUARTILE	MEAN	UPPER QUARTILE	MAXIMUM
Salary	EMEA	Junior	€24,000	€27,750	€35,250	€41,250	€52,000
		Senior	€36,000	€45,000	€57,000	€65,000	€94,000
		Manager	€38,000	€71,125	€80,710	€90,000	€120,000
		Senior Manager	€50,000	€77,000	€94,000	€114,000	€135,000
		Director / VP	€97,500	€108,500	€127,583	€141,250	€185,000
	North America	Junior	\$40,000	\$43,500	\$49,865	\$55,344	\$66,000
		Senior	\$55,000	\$63,200	\$71,314	\$70,000	\$90,000
		Manager	\$90,000	\$108,500	\$128,668	\$147,013	\$180,000
		Senior Manager	\$115,000	\$135,500	\$148,005	\$154,638	\$200,000
		Director / VP	\$120,000	\$146,500	\$163,731	\$177,000	\$255,000
	APAC	Junior	\$25,000	\$32,750	\$39,167	\$44,500	\$55,000
		Senior	\$32,000	\$38,000	\$50,685	\$60,625	\$75,000
		Manager	\$46,500	\$61,750	\$79,813	\$98,500	\$110,000
		Senior Manager	\$73,600	\$110,000	\$128,657	\$153,500	\$180,000
		Director / VP	\$140,000	\$152,000	\$171,400	\$195,000	\$210,000



SALES

A great product can arguably sell itself, but with so many different technologies, increasing competition and varying applications the skill set of the sales team within additive manufacturing is vastly significant to the success of an organization. First they have to build relationships with potential customers and partners. Second, they must understand the need of the customer and then provide a solution which enables the customer to achieve their goals with AM technology.

There are typically two types of sales models adopted within additive manufacturing: Direct Sales and Indirect Sales, although most businesses will adopt a hybrid model involving both.

EXAMPLES OF ROLES & RESPONSIBILITIES

- **AM Sales Manager:** Oversees the sales team, develops strategies to drive revenue growth, and manages client relationships within the AM sector.
- **AM Business Development Manager:** Identifies new market opportunities, builds partnerships, and drives business expansion by promoting AM solutions to potential clients.
- **AM Sales Engineer:** Combines technical expertise with sales skills to help clients understand how AM technologies can meet their specific needs.
- **AM Key Account Manager:** Manages relationships with major clients, ensuring satisfaction and growth by providing tailored AM solutions.
- **AM Technical Sales Specialist:** Focuses on selling complex AM technologies by providing in-depth technical knowledge and support to customers.
- **AM Inside Sales Representative:** Handles client inquiries, generates leads, and closes sales remotely, focusing on early-stage client engagement and relationship-building.
- **AM Sales Operations Manager:** Supports the sales team by overseeing the processes, tools, and data management needed to ensure smooth and efficient sales operations.

SALARY ANALYSIS

+1.05% increase in average salaries, across all regions and seniorities within Sales.

+8%

increase in average salaries, across seniorities in **EMEA**

+1.2%

increase in average salaries, across seniorities in **North America**

-4.9%

decrease in average salaries, across seniorities in **APAC**

SALES SALARY BENCHMARKS

		Junior (Entry Level) 0-2 Years Experience	Senior (Experienced) 2-5 Years Experience	Director 5-10 Years Experience	VP 10-15 Years Experience	CRO +15 Years Experience
EMEA	Min	€ 25,000	€ 35,000	€ 40,000	€ 65,000	€ 95,000
	Average	€ 42,900	€ 62,361	€ 80,238	€ 135,531	€ 171,428
	Max	€ 66,000	€ 90,000	€ 124,000	€ 190,000	€ 250,000
NORTH AMERICA & CANADA	Min	\$ 55,000	\$ 72,400	\$ 120,000	\$ 140,000	\$ 176,000
	Average	\$ 67,542	\$ 94,800	\$ 142,000	\$ 183,650	\$ 220,200
	Max	\$ 85,000	\$ 155,000	\$ 180,000	\$ 220,000	\$ 300,000
APAC	Min	\$ 25,000	\$ 30,000	\$ 45,000	\$ 68,000	\$ 120,000
	Average	\$ 34,355	\$ 54,389	\$ 89,222	\$ 135,556	\$ 209,375
	Max	\$55,000	\$ 85,500	\$ 135,000	\$ 200,000	\$ 300,000

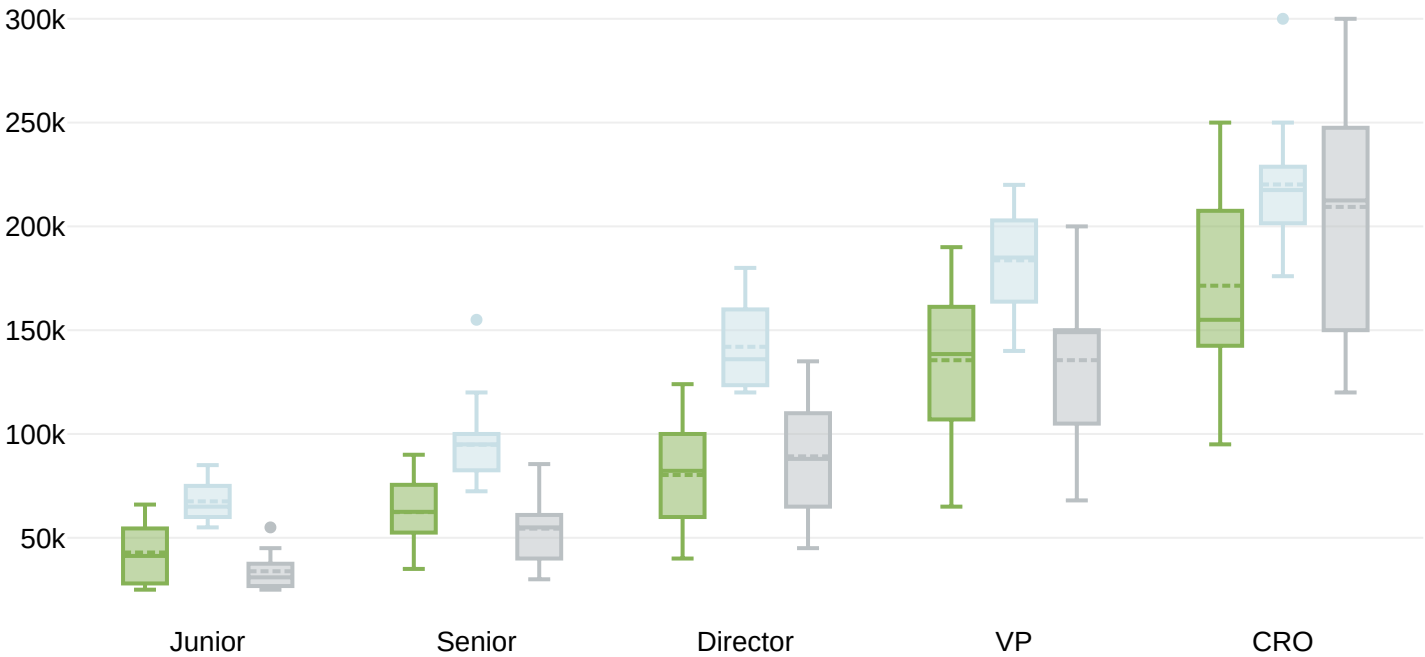
*All salaries are base salaries and do not include bonuses or benefits

** APAC salaries are in US Dollars (\$)

GLOBAL DISTRIBUTION OF SALES SALARIES

The below table and chart show the distribution of Sales salaries across EMEA, North America and APAC, providing our readers with a way of understanding how salaries are distributed across seniorities in the market.

		SENIORITY	MINIMUM	LOWER QUARTILE	MEAN	UPPER QUARTILE	MAXIMUM
Salary	EMEA	Junior	€25,000	€28,000	€42,900	€54,500	€66,000
		Senior	€35,000	€52,500	€62,362	€75,500	€90,000
		Director	€40,000	€60,000	€80,239	€100,000	€124,000
		VP	€65,000	€107,000	€135,531	€161,250	€190,000
		CRO	€95,000	€142,500	€171,429	€207,500	€250,000
	North America	Junior	\$55,000	\$60,000	\$67,542	\$75,000	\$85,000
		Senior	\$72,400	\$82,500	\$94,800	\$100,000	\$155,000
		Director	\$120,000	\$123,500	\$142,000	\$160,000	\$180,000
		VP	\$140,000	\$163,750	\$183,650	\$202,875	\$220,000
		CRO	\$176,000	\$201,500	\$220,200	\$228,750	\$300,000
	APAC	Junior	\$25,000	\$26,500	\$34,355	\$39,000	\$55,000
		Senior	\$30,000	\$40,000	\$54,389	\$61,000	\$85,500
		Director	\$45,000	\$65,000	\$89,222	\$110,000	\$135,000
		VP	\$68,000	\$105,000	\$135,556	\$150,000	\$200,000
		CRO	€120,000	€150,000	€209,375	€247,500	€300,000



R&D AND ENGINEERING

R&D is essential to the future of the additive manufacturing (AM) sector, driving technological innovation, discovering new applications, and developing materials and software. AM adopters focus on business model evolution, either through new product development or by reshaping supply chains to bring manufacturing closer to consumers.

R&D managers play a key role in turning research into industrial applications, ensuring projects meet industry needs, and providing technical marketing to highlight new technologies' benefits. R&D takes place in both industry and academia, with many initial innovations emerging from universities.

EXAMPLES OF ROLES & RESPONSIBILITIES

- **R&D Engineer:** Conducts research and develops new tech, materials, and processes.
- **Materials Scientist:** Focuses on the development and testing of new materials improving strength, durability, and functionality.
- **Process Development Engineer:** Researching and creating new processes or optimizing existing ones to improve build quality, speed, and cost-effectiveness.
- **Mechanical Engineer:** Designs and optimizes mechanical components and systems for AM, ensuring strength, functionality, and manufacturability.
- **Manufacturing Engineer:** Develops and implements manufacturing processes for 3D printed parts, focusing on efficiency, quality, and scalability.
- **AM Design Engineer:** Designing parts specifically for AM.
- **AM Systems Engineer:** Oversees the integration of AM technologies within broader production systems, ensuring seamless workflow and operational efficiency.
- **AM Research Scientist:** Investigates fundamental aspects of AM technologies, exploring new theories, methods, and approaches to advance the field.

SALARY ANALYSIS

+6.5%

increase in average salaries, across all regions and seniorities within R&D and Engineering.

+7.1%

increase in average salaries, across seniorities in **EMEA**

+10.5%

increase in average salaries, across seniorities in **North America**

-0.2%

decrease in average salaries, across seniorities in **APAC**

R&D AND ENGINEERING SALARY BENCHMARKS

		Junior (Entry Level) 0-2 Years Experience	Senior (Experienced) 2-5 Years Experience	Manager (Lead or Manager) 5-10 Years Experience	Senior Manager / Director (Senior Level Experienced) 10-15 Years Experience	VP / CTO (Executive Level) +15 Years Experience
EMEA	Min	€ 32,000	€ 38,000	€ 45,000	€ 65,000	€ 90,000
	Average	€ 48,126	€ 61,104	€ 78,184	€ 103,875	€ 135,000
	Max	€ 68,500	€ 90,000	€ 105,000	€ 150,000	€ 200,000
NORTH AMERICA & CANADA	Min	\$ 62,500	\$ 97,000	\$ 102,000	\$ 122,000	\$ 155,000
	Average	\$ 83,895	\$ 125,892	\$ 142,338	\$ 192,385	\$ 229,847
	Max	\$ 112,000	\$ 162,000	\$ 195,000	\$ 235,000	\$ 300,000
APAC	Min	\$ 30,000	\$ 37,000	\$ 46,000	\$ 65,000	\$ 145,000
	Average	\$ 41,237	\$ 54,090	\$ 77,000	\$ 118,000	\$ 185,833
	Max	\$ 68,000	\$ 95,000	\$ 135,000	\$ 171,000	\$ 230,000

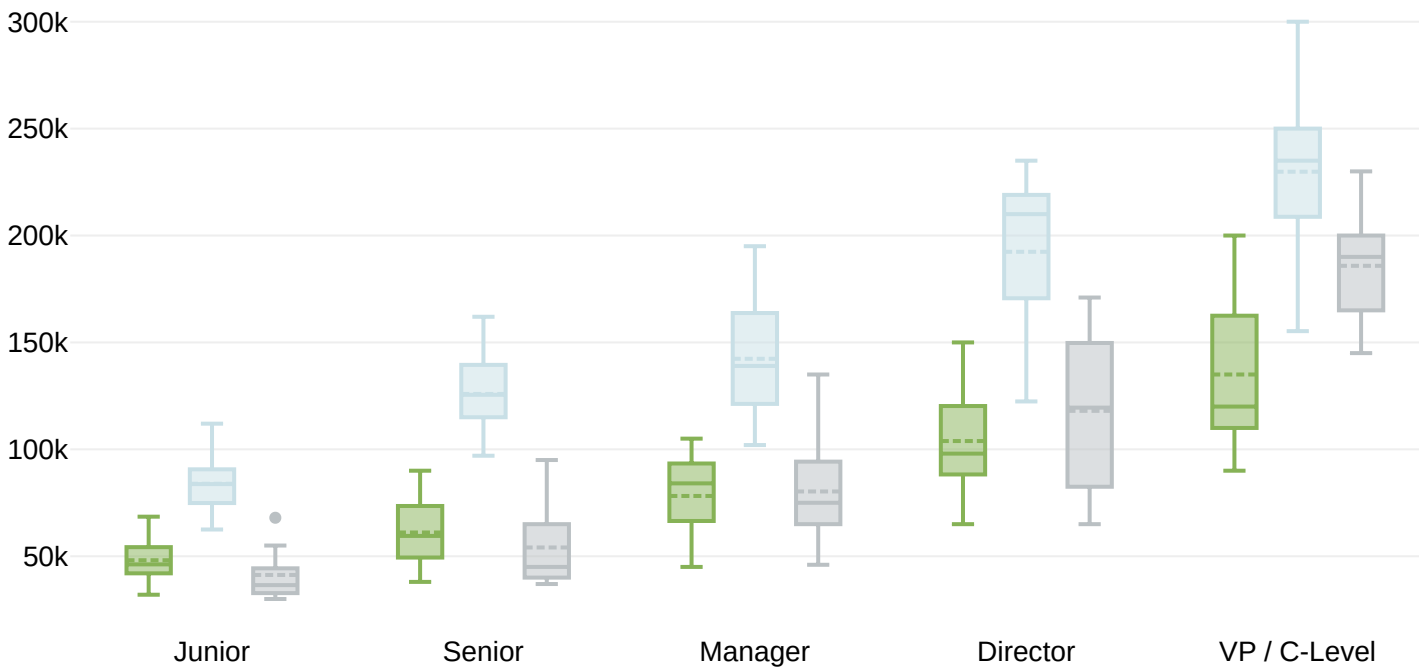
*All salaries are base salaries and do not include bonuses or benefits

** APAC salaries are in US Dollars (\$)

GLOBAL DISTRIBUTION OF R&D AND ENGINEERING SALARIES

The below table and chart show the distribution of R&D and Engineering salaries across EMEA, North America and APAC, providing our readers with a way of understanding how salaries are distributed across seniorities in the market.

		SENIORITY	MINIMUM	LOWER QUARTILE	MEAN	UPPER QUARTILE	MAXIMUM
Salary	EMEA	Junior	€32,000	€42,000	€48,127	€54,250	€68,500
		Senior	€38,000	€49,375	€61,104	€73,500	€90,000
		Manager	€45,000	€66,491	€78,184	€93,375	€105,000
		Senior Manager	€65,000	€88,250	€103,875	€120,250	€150,000
		Director / VP	€90,000	€110,000	€135,000	€162,500	€200,000
	North America	Junior	\$62,500	\$74,875	\$83,895	\$90,650	\$112,000
		Senior	\$97,000	\$115,000	\$125,893	\$139,500	\$162,000
		Manager	\$102,000	\$121,250	\$142,338	\$163,750	\$195,000
		Senior Manager	\$122,400	\$170,650	\$192,386	\$219,000	\$235,000
		Director / VP	\$155,275	\$208,750	\$229,848	\$250,000	\$300,000
	APAC	Junior	\$30,000	\$32,750	\$41,238	\$44,344	\$68,000
		Senior	\$37,000	\$40,000	\$54,091	\$65,000	\$95,000
		Manager	\$46,000	\$62,500	\$77,000	\$81,250	\$135,000
		Senior Manager	\$65,000	\$82,500	\$118,000	\$149,750	\$171,000
		Director / VP	\$145,000	\$165,000	\$185,833	\$200,000	\$230,000



APPLICATION & CONSULTING

Understanding the potential of additive manufacturing technology is not always apparent to organizations. Some companies will be just starting their AM journey while others will be further along and working towards building the factories of the future. The ability to help organizations move further down their path to AM adoption often sits with the skills and experience of the Application Engineering/Consulting teams.

Working within Application Engineering & Consulting is one of the more technically challenging roles within Additive Manufacturing. Working closely with sales and business development application engineers to help support customers in understanding the technology, its applications in their organization and the wider transformational impact it could have. The application engineers work with potential customers to understand their requirements and demonstrate how AM can be adopted to realize its benefits.

TYPE OF ROLES & RESPONSIBILITIES

- **Application Engineer:** Provides technical support and solutions for customers, helping them optimize the use of additive manufacturing technologies for specific applications.
- **3D Printing Engineer:** Specializes in designing, setting up, and optimizing 3D printing processes to create parts that meet exact specifications and quality standards.
- **Client Application Engineer:** Works closely with customers to understand their technical needs and tailor additive manufacturing solutions to fit their specific requirements.
- **Technical Consultant:** Advises clients on the best practices, technologies, and strategies in additive manufacturing to improve processes and achieve project goals.
- **Pre-Sales Engineer:** Supports the sales team by providing technical expertise, demonstrating product capabilities, and helping clients understand how AM solutions meet their needs.

SALARY ANALYSIS

+8.2%

increase in average salaries, across all regions and seniorities within Applications & Consulting

+15.8%

increase in average salaries, across seniorities in **EMEA**

+4.5%

increase in average salaries, across seniorities in **North America**

+7.08%

increase in average salaries, across seniorities in **APAC**

APPLICATIONS ENGINEERING & CONSULTING SALARY BENCHMARKS

		Junior (Entry Level) 0-2 Years Experience	Senior (Experienced) 2-5 Years Experience	Manager (Lead or Manager) 5-10 Years Experience	Senior Manager / Head of Department (Senior Level Experienced) 10-15 Years Experience	Director / VP (Executive Level) +15 Years Experience
EMEA	Min	€ 29,500	€ 34,000	€ 45,000	€ 75,000	€ 96,750
	Average	€ 48,925	€ 58,412	€ 83,106	€ 115,250	€ 158,523
	Max	€ 74,000	€ 90,000	€ 130,000	€ 170,000	€ 225,000
NORTH AMERICA & CANADA	Min	\$ 60,000	\$ 75,000	\$ 105,000	\$ 115,000	\$ 160,000
	Average	\$ 85,192	\$ 110,447	\$ 147,900	\$ 167,364	\$ 231,975
	Max	\$ 115,000	\$ 168,000	\$ 195,000	\$ 235,000	\$ 280,000
APAC	Min	\$ 35,000	\$ 40,000	\$ 55,000	\$ 65,000	\$ 130,000
	Average	\$ 48,444	\$ 56,813	\$ 80,000	\$ 118,591	\$ 189,375
	Max	\$ 75,000	\$ 95,000	\$ 120,000	\$ 195,000	\$ 230,000

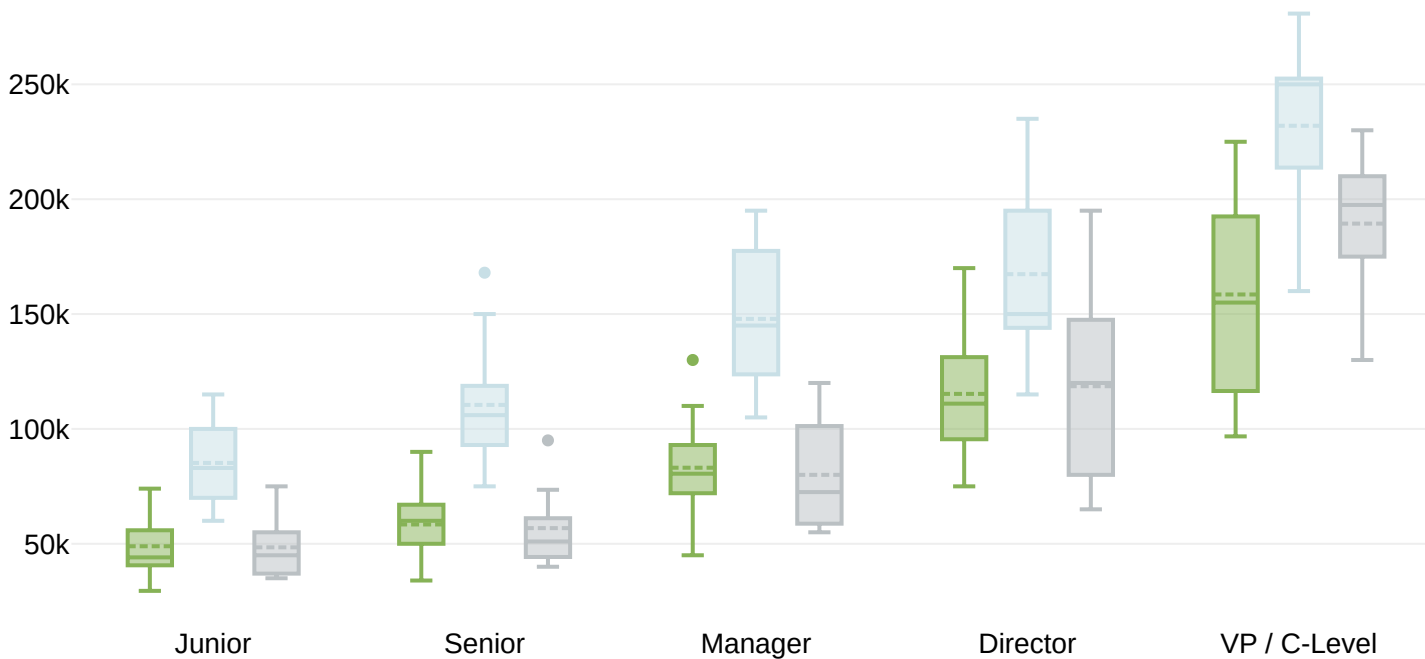
*All salaries are base salaries and do not include bonuses or benefits

** APAC salaries are in US Dollars (\$)

GLOBAL DISTRIBUTION OF APPLICATIONS ENGINEERING & CONSULTING SALARIES

The below table and chart show the distribution of Applications Engineering & Consulting salaries across EMEA, North America and APAC, providing our readers with a way of understanding how salaries are distributed across seniorities in the market.

		SENIORITY	MINIMUM	LOWER QUARTILE	MEAN	UPPER QUARTILE	MAXIMUM
Salary	EMEA	Junior	€29,500	€40,625	€48,925	€55,875	€74,000
		Senior	€34,000	€50,000	€58,412	€67,000	€90,000
		Manager	€45,000	€72,000	€83,106	€93,000	€130,000
		Senior Manager	€75,000	€95,500	€115,250	€131,250	€170,000
		Director / VP	€96,750	€116,500	€158,523	€192,500	€225,000
	North America	Junior	\$60,000	\$70,000	\$85,192	\$100,000	\$115,000
		Senior	\$75,000	\$93,000	\$110,447	\$118,750	\$168,000
		Manager	\$105,000	\$123,750	\$147,900	\$177,500	\$195,000
		Senior Manager	\$115,000	\$144,000	\$167,364	\$195,000	\$235,000
		Director / VP	\$160,000	\$213,750	\$231,975	\$252,500	\$280,800
	APAC	Junior	\$35,000	\$37,000	\$48,444	\$55,000	\$75,000
		Senior	\$40,000	\$44,250	\$56,813	\$61,125	\$95,000
		Manager	\$55,000	\$58,750	\$80,000	\$101,250	\$120,000
		Senior Manager	\$65,000	\$80,000	\$118,591	\$147,500	\$195,000
		Director / VP	\$130,000	\$175,000	\$189,375	\$210,000	\$230,000



SOFTWARE

Living in a completely connected world nothing is possible without Software and in the case of Additive Manufacturing, the hardware (i.e. the machine) is just the tool by which the part is created, the true enabler is software.

Software is critical at all stages within the AM process. In the design phase it is software that enables the creation of the intricate parts that can then be built. Desktop application software translates the complex design files and communicates them with the hardware. Embedded Software then drives the hardware to achieve the desired product. Throughout the process, software which measures the build process and provides real time data.

TYPE OF ROLES & RESPONSIBILITIES

- **Software Engineer:** Designs, develops, and maintains software applications and systems.
- **Software Automation Engineer:** Develops and implements automated systems and scripts to streamline processes, increase productivity, and reduce manual intervention.
- **Embedded Engineer:** Specializes in designing and developing embedded systems software that directly controls hardware in real-time environments.
- **Software Developer:** Creates and maintains software programs, writing and testing code to meet user requirements and improve system performance.
- **Data Engineer:** Designs and builds infrastructure for data generation, storage, and analysis.
- **Machine Learning Engineer:** Develops machine learning algorithms and models to enable systems to learn and improve from data without being explicitly programmed.
- **Computational Geometry Engineer:** Specializes in algorithms related to the representation and manipulation of geometric data, often used in 3D modeling and computer-aided design.
- **Software Controls Engineer:** Designs and implements control systems software, ensuring that automated machines and processes function according to desired parameters.

SALARY ANALYSIS

+2.7%

increase in average salaries, across all regions and seniorities, within Software.

+2.1%

increase in average salaries across seniorities in **EMEA**

+7%

increase in average salaries across seniorities in **North America**

-2.6%

decrease in average salaries across seniorities in **APAC**

AM SOFTWARE SALARY BENCHMARKS

		Junior (Entry Level) 0-2 Years Experience	Senior (Experienced) 2-5 Years Experience	Manager (Lead or Manager) 5-10 Years Experience	Senior Manager / Head of Department (Senior Level Experienced) 10-15 Years Experience	Director / VP (Executive Level) +15 Years Experience
EMEA	Min	€ 28,000	€ 40,000	€ 50,000	€ 80,000	€ 110,000
	Average	€ 41,071	€ 61,081	€ 75,034	€ 103,917	€ 137,889
	Max	€ 63,000	€ 85,000	€ 100,000	€ 145,000	€ 205,000
NORTH AMERICA & CANADA	Min	\$ 55,000	\$ 75,000	\$ 110,000	\$ 130,000	\$ 180,000
	Average	\$ 74,417	\$ 117,700	\$ 148,680	\$ 178,333	\$ 223,357
	Max	\$ 92,000	\$ 180,000	\$ 205,500	\$ 250,000	\$ 280,000
APAC	Min	\$ 25,000	\$ 35,000	\$ 38,500	\$ 65,000	\$ 180,000
	Average	\$ 45,000	\$ 62,000	\$ 81,611	\$ 113,375	\$ 206,429
	Max	\$ 75,000	\$ 100,000	\$ 120,000	\$ 180,000	\$ 250,000

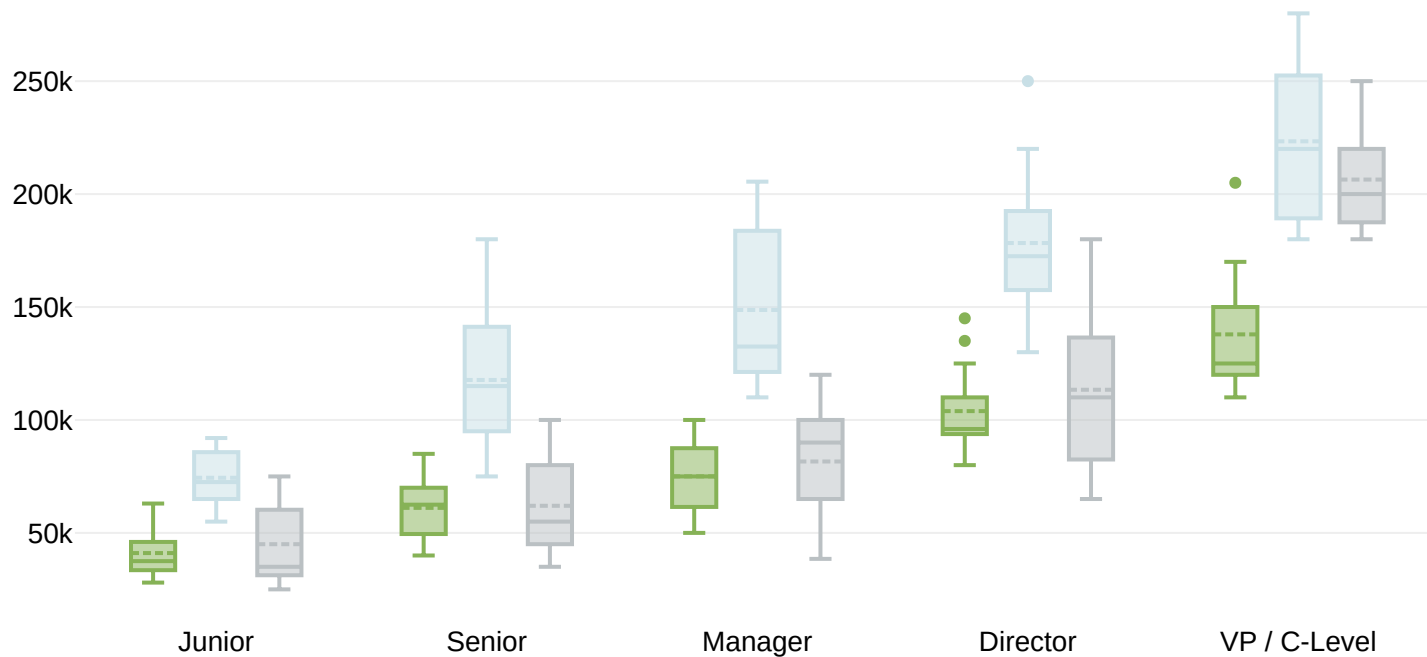
*All salaries are base salaries and do not include bonuses or benefits

** APAC salaries are in US Dollars (\$)

GLOBAL DISTRIBUTION OF AM SOFTWARE SALARIES

The below table and chart show the distribution of AM Software salaries across EMEA, North America and APAC, providing our readers with a way of understanding how salaries are distributed across seniorities in the market.

		SENIORITY	MINIMUM	LOWER QUARTILE	MEAN	UPPER QUARTILE	MAXIMUM
Salary	EMEA	Junior	€28,000	€33,500	€41,071	€46,000	€63,000
		Senior	€40,000	€49,500	€61,081	€70,000	€85,000
		Manager	€50,000	€61,500	€75,034	€87,500	€100,000
		Senior Manager	€80,000	€93,750	€103,917	€110,000	€145,000
		Director / VP	€110,000	€120,000	€137,889	€150,000	€205,000
	North America	Junior	\$55,000	\$65,000	\$74,417	\$85,750	\$92,000
		Senior	\$75,000	\$95,000	\$117,700	\$141,250	\$180,000
		Manager	\$110,000	\$121,250	\$148,680	\$183,750	\$205,500
		Senior Manager	\$130,000	\$157,500	\$178,333	\$192,500	\$250,000
		Director / VP	\$180,000	\$189,250	\$223,357	\$252,500	\$280,000
	APAC	Junior	\$25,000	\$31,250	\$45,000	\$60,250	\$75,000
		Senior	\$35,000	\$45,000	\$62,000	\$80,000	\$100,000
		Manager	\$38,500	\$65,000	\$81,611	\$100,000	\$120,000
		Senior Manager	\$65,000	\$82,500	\$113,375	\$136,500	\$180,000
		Director / VP	\$180,000	\$187,500	\$206,429	\$220,000	\$250,000



TECHNICIANS & OPERATORS

In the world of Additive Manufacturing, Machine Operators and Technicians play a crucial role in transforming digital designs into physical parts. While the machines themselves are the tools that produce these parts, it is the skilled hands of operators and technicians that ensure the process runs smoothly and efficiently.

At every stage of the AM process, Machine Operators and Technicians are responsible for overseeing the setup, calibration, and operation of the hardware. They ensure the machines are properly maintained, troubleshoot technical issues, and monitor the production process to ensure quality. From preparing materials to handling post-production tasks like part removal and finishing, these professionals are integral to achieving successful builds. Their expertise in both machine operation and process optimization is vital to delivering precise and consistent results.

TYPE OF ROLES & RESPONSIBILITIES

- **AM Machine Operator:** Operating and maintaining 3D printing machines, ensuring proper setup, calibration, and production quality.
- **AM Technician:** Provides technical support, performs machine maintenance, and troubleshoots hardware and software issues during the production process.
- **AM Process Technician:** Optimizing and monitoring the AM process
- **Post-Processing Technician:** Finishing parts after production.
- **AM Maintenance Technician:** Ensures the continuous operation of AM machines.
- **AM Quality Control Technician:** Inspecting and verifying the quality of printed parts.
- **AM Materials Technician:** Manages and prepares materials used in the 3D printing process.
- **AM Calibration Technician:** Specializes in precision calibration of machines to ensure they produce parts that meet exact specifications and tolerances.
- **AM Production Supervisor:** Oversees machine operators and technicians, managing production schedules, and ensuring operational efficiency within the AM facility.
- **AM Field Service Technician:** Provides on-site installation, repair, and support for AM machines at customer locations or in production environments.

AM TECHNICIANS & OPERATORS SALARY BENCHMARKS

		Junior (Entry Level) 0-2 Years Experience	Senior (Experienced) 2-5 Years Experience	Lead (Lead or Manager) 5+ Years Experience
EMEA	Min	€ 23,600	€ 30,000	€ 38,375
	Average	€ 33,197	€ 41,550	€ 49,281
	Max	€ 50,000	€ 60,000	€ 65,000
NORTH AMERICA & CANADA	Min	\$ 41,600	\$ 66,000	\$ 75,000
	Average	\$ 63,067	\$ 79,280	\$ 90,062
	Max	\$ 85,280	\$ 89,000	\$ 98,370

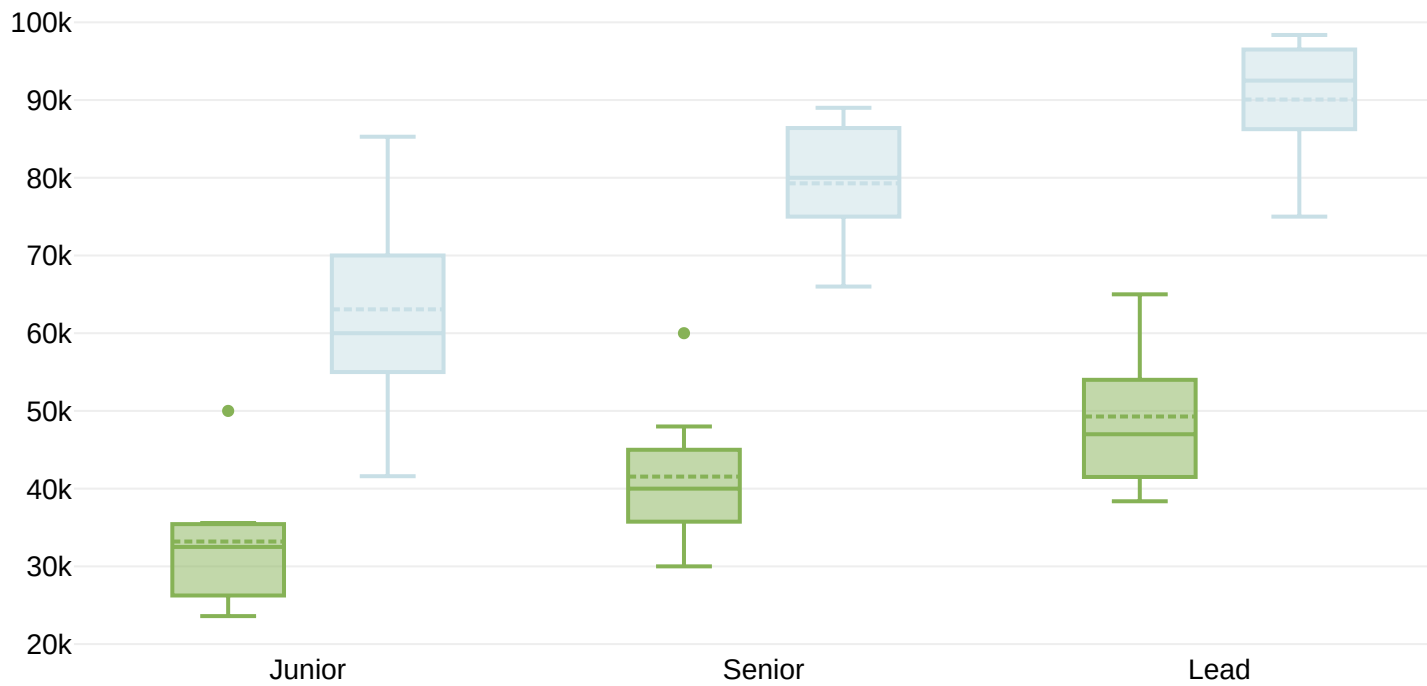
*All salaries are base salaries;
Hourly salaries have been converted to a yearly salary on the basis of a 40 hour work week.

GLOBAL DISTRIBUTION OF OPERATOR & TECHNICIAN SALARIES

For the first time, we are highlighting the salaries of Machine Operators and AM Technicians, roles that are becoming increasingly essential in the workforce. To provide a comprehensive view, we have surveyed and cross-referenced salary data for these positions.

The table and chart below illustrate the salary distribution for AM Operators and Technicians across EMEA and North America, offering insights into how compensation varies by seniority within the market.

		SENIORITY	MINIMUM	LOWER QUARTILE	MEAN	UPPER QUARTILE	MAXIMUM
Salary	EMEA	Junior	€23,600	€26,250	€33,197	€35,435	€50,000
		Senior	€30,000	€35,750	€41,550	€45,000	€60,000
		Lead	€38,375	€41,500	€49,281	€54,000	€65,000
	North America	Junior	\$41,600	\$55,000	\$63,067	\$70,000	\$85,280
		Senior	\$66,000	\$75,000	\$79,280	\$86,400	\$89,000
		Lead	\$75,000	\$86,250	\$90,062	\$96,500	\$98,370



HOW CAN WE HELP YOU?

WHO WE ARE

Industry 4.0 is the integration of digital technologies into manufacturing and industrial processes. Alexander Daniels Global are at the forefront of this new digital industrial revolution. Working globally to support clients with critical hires, we operate in the niche fields of Additive & Advanced Manufacturing, Software & IoT and Robotics & Industrial Automation. From our three international offices in Birmingham (UK), Detroit (US) and Berlin (Germany), we help our clients identify talent for roles within R&D, Engineering & Production, Software Engineering & Development, Sales, Marketing, Application Engineering, Product Management and Service.

OUR NETWORK

Our network counts more than +100,000 AM professionals, including off-market candidates that are not actively searching for new positions.

We use this extensive network to fill positions for our clients in North America, EMEA and APAC regions.

Our specialized multi-lingual, delivery team manages discipline-specific talent pools across North America and Europe to facilitate the recruitment process and shorten the time-to-hire.

EMAIL

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DISCIPLINES WE SERVE

- C-Level / Executive Managers
- R&D
- Engineering & Production
- Software Engineering & Development
- Sales
- Marketing
- Application Engineering
- Product Management
- Service.

CLIENTS WE WORK WITH

- Original Equipment Manufacturers
- Software companies (design, optimization & topology, simulation workflow, machine communication and control)
- Robotics companies
- MedTech, BioTech & Dental
- Material manufacturers
- Adopters of advanced manufacturing and 3D printing in different industries

SERVICES

- Contingent Recruitment
- Advanced Selection (Retained)
- Partnership (subscription-based)

GET IN TOUCH

TALK TO US ABOUT YOUR HIRING NEEDS



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SOURCES

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[Stratasys Plans Restructuring After Q2 2024 Financial Results Show Revenue Decline](#)

[2] 3D Printing Industry

[3D Systems Sees Sequential Revenue Growth in Q2 2024](#)

[3] TechCrunch

[North American Robotics Sales Declined in First Half of 2024](#)

[4] Additive Manufacturing Research

[3D Printing Market Reaches \\$3.45B in Q2 2024, Marking 8.4% Year-Over-Year Growth](#)

[5] Matthias Schmidt-Lehr (2024)

[LinkedIn Post: AMPOWER Report 2024](#)

[6] Alexander Daniels Global (2024)

[2024 Additive Manufacturing Salary Survey Report](#)

[7] Deloitte

[Press Release: US Manufacturing Could Need as Many as 3.8 Million New Employees by 2033. According to Deloitte and The Manufacturing Institute](#)

[8] AUKUS (Australia-United Kingdom-United States)

[Build Submarines](#)

[9] America's Navy

[SECNAV Del Toro Announces Michigan Maritime Manufacturing Initiative](#)

[10] 3DPrint.com

[3D Printing's Next Generation of Leadership: A Conversation with Additive Minds' Dr. Gregory Hayes](#)

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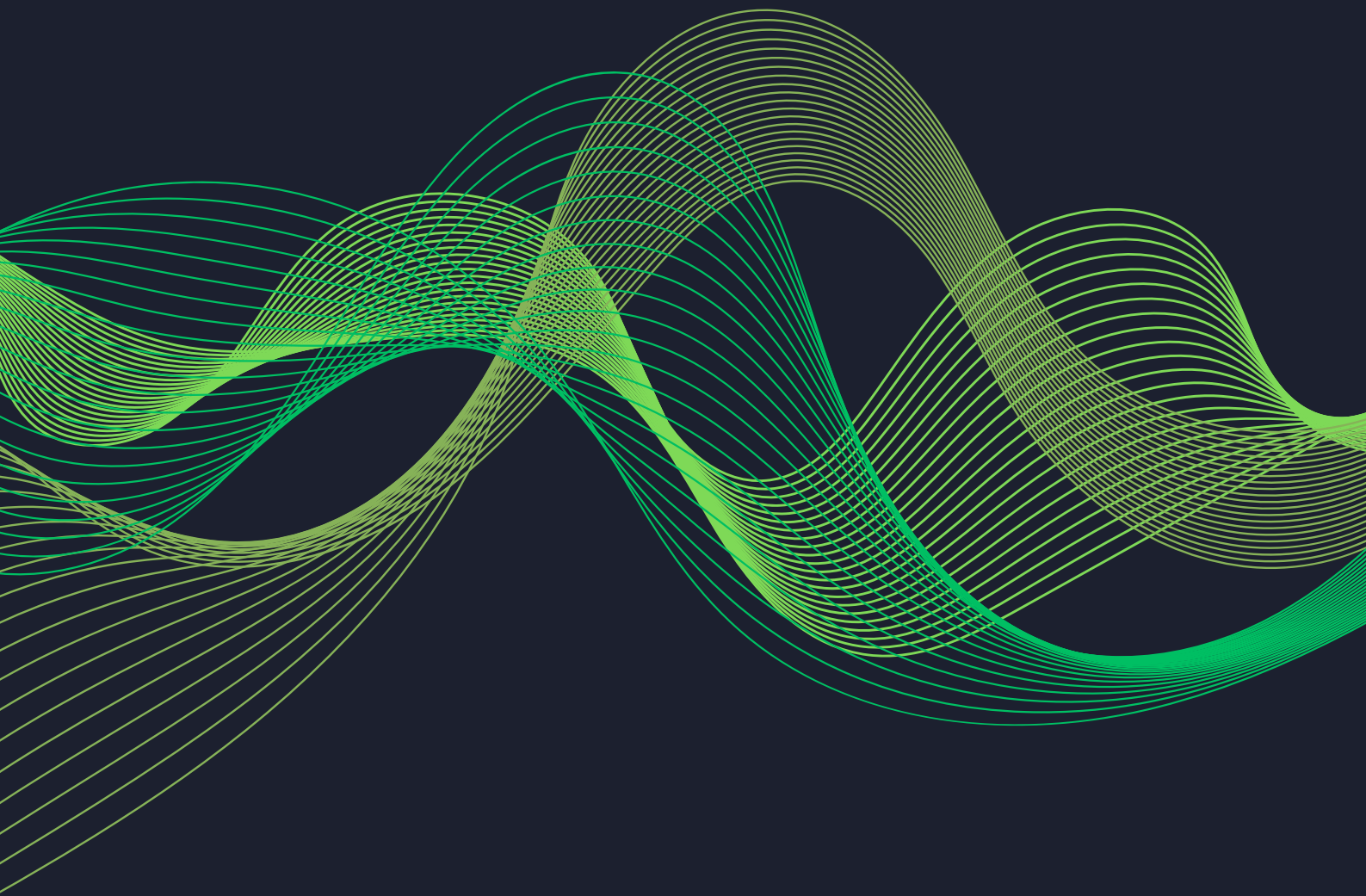
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ALEXANDER DANIELS GLOBAL
INDUSTRY 4.0 RECRUITMENT SPECIALISTS

2025 Additive Manufacturing Salary Survey Report
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