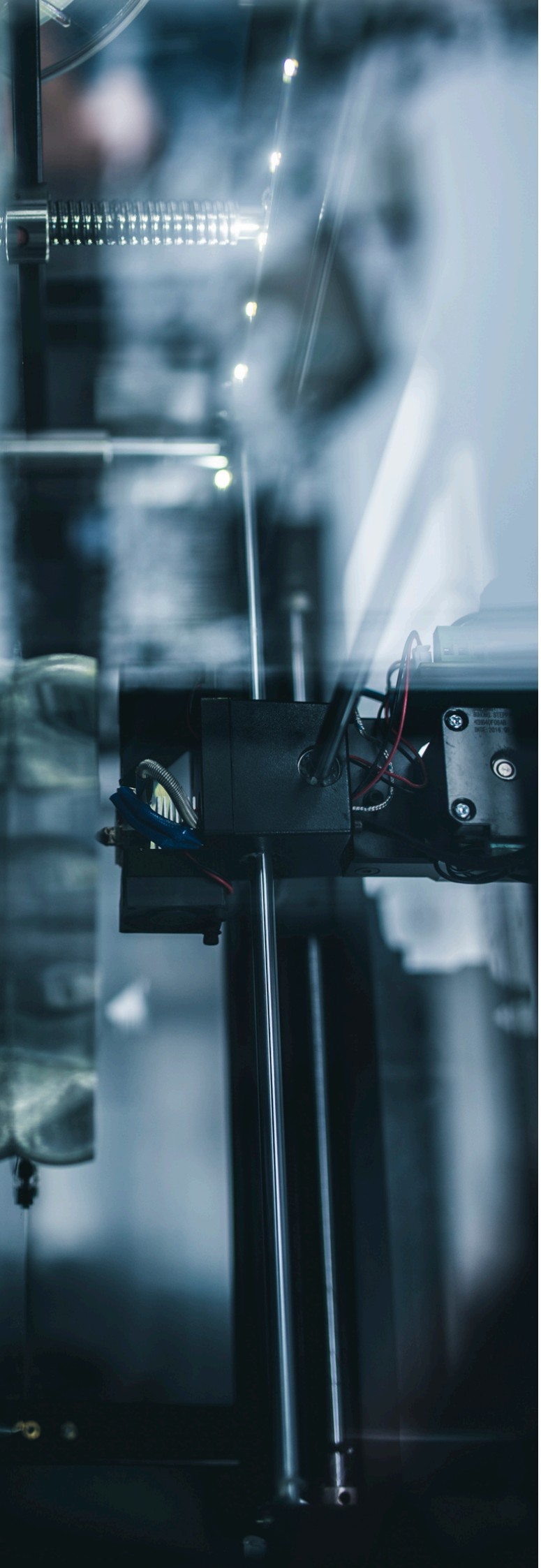


SALARY REPORT

2025 EDITION

A COMPREHENSIVE SALARY REPORT CONTAINING DATA ON REMUNERATION PACKAGES IN THE ADDITIVE MANUFACTURING INDUSTRY.

PREPARED BY:

KENSINGTON ADDITIVE

CONTENTS

ABOUT US

Your Partner for Additive Manufacturing Talent

Kensington Additive is a specialized recruitment firm focused on the additive manufacturing sector. Established in 2014 as a part of Kensington Consulting Ltd, the company leverages deep technical expertise and a robust understanding of client needs to bridge the skills gap in this rapidly evolving industry.

Kensington Additive operates on principles of Quality, Commitment, Communication, and Knowledge. Our mission is to connect businesses with top-tier talent, ensuring that clients can achieve their goals through effective hiring practices. We emphasize a unique recruitment approach called Root-Cause Recruitment, which allows us to understand both client requirements and candidate motivations deeply.

Global Network

Since our inception, Kensington Additive has built an extensive global network of talent. We have successfully partnered with market-leading machine manufacturers, end users, powder producers, and service bureaus across North America, Europe, and the UK. This network allows us to source a wide range of professionals, from engineers to C-suite executives.

Expertise and Services

The company specializes in sourcing professionals across various roles in additive manufacturing, including engineering, sales, and leadership positions. Our consultants possess hands-on experience with 3D printing technology, enhancing our capability to match candidates effectively with client needs.

Emphasis on Cultural Fit

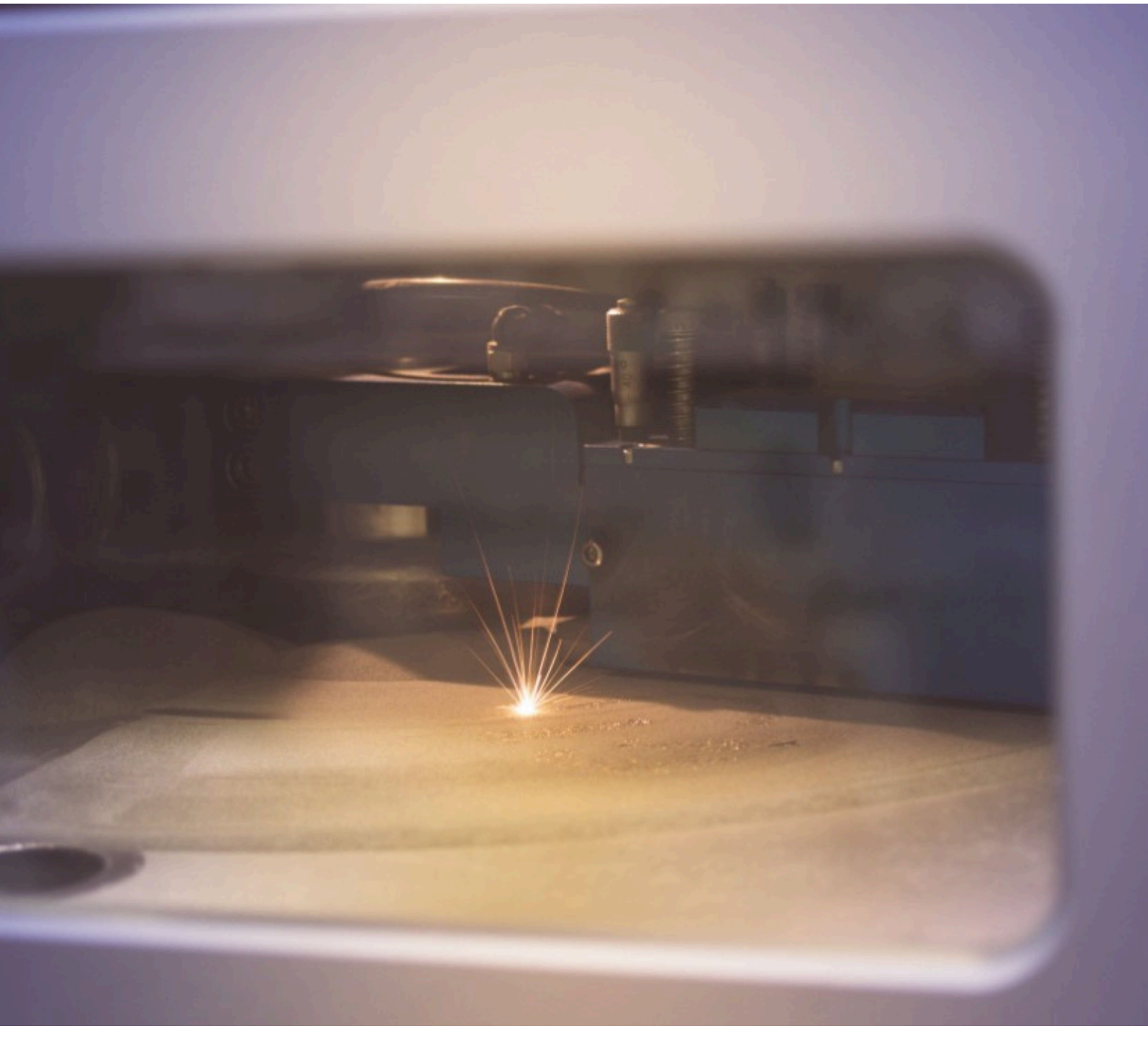
While many recruiters focus primarily on technical skills, Kensington Additive places significant importance on cultural fit.

We recognize that in the additive manufacturing industry, particularly with many start-up organizations, assessing cultural fit from day one is crucial.

We use a unique piece of software , which involves a 2-way recorded video interview process to assess candidates' behaviors early in the hiring process.

Premium Service for Candidates and Clients
Our approach doesn't just benefit our clients; it also works wonders for our candidates. By understanding your reasons for wanting a new role and what you're truly looking for, we can find the perfect fit for your skills, personality, and career goals.

Industry Insights
Through our global network and attendance at trade shows, Kensington Additive gains valuable industry knowledge that benefits our clients. We can provide insights into market trends, salary expectations, and skill availability across different regions. This information helps clients make informed decisions about their hiring strategies and talent acquisition plans.



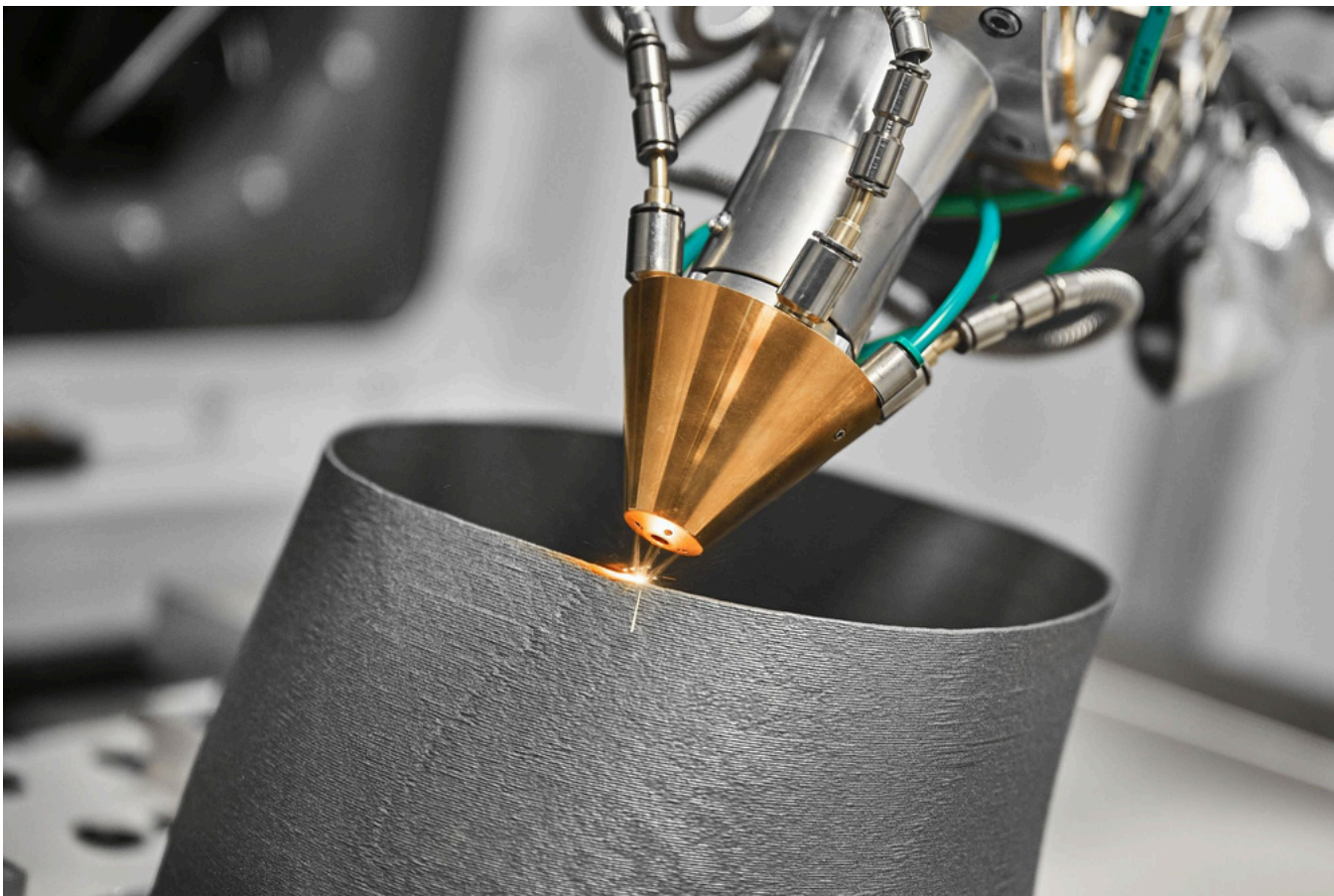
ABOUT THE REPORT

Since January 2024, Kensington Additive has been gathering comprehensive data from candidates and employers across the roles we support. This data offers valuable insights into average salary expectations from candidates and the salary ranges companies offer for these positions.

Our focus remains on Europe and North America, consistent with previous surveys, as these regions are central to Kensington Additive's recruitment efforts and are key hubs for AM activity and growth. In crafting the 2025 report, we've selected prominent locations within the EU and U.S., where demand for 3D printing professionals and AM businesses is particularly strong.

Our database now houses over 30,000 candidate profiles within the Additive and Advanced Manufacturing sectors, all managed in compliance with GDPR to ensure data privacy and relevance.

One significant trend from last year's survey is the increasing number of consolidations and mergers across key player's in the additive manufacturing market. Continue reading to uncover more of the trends in the additive and advanced manufacturing industries moving into 2025.



MARKET TRENDS

An Overview
At the start of 2024, there was a general feeling of uncertainty about the additive manufacturing market, with many leaders in the industry sharing negative views about the future of the sector. It seems, that some of that pessimistic feeling was justified, with companies such as Shapeways ceasing to exist, to extensive lay offs from Velo3D. In turn, the candidate market is becoming increasingly more cautious, with many people looking for companies that will offer job security and a unique proposition.

There was question mark about the hype of some of the additive manufacturing technologies, and investment has since decreased, meaning that in the future, AM start-ups will need to be more realistic about what they can actually deliver.

However, in the *April 2024 edition of Fon Mag*, a number of industry experts commented that they did not see the market in the same 'glass half empty' approach. Overall, the additive manufacturing continues to grow, a positive sign moving into 2025.

APAC
There are certain trends that offer a bright outlook into the future of 3D printing, including new entrants into the market, particularly from the APAC region, including the likes of BambuLab, and Farsoon Technologies.

Healthcare
The Healthcare AM Market is growing rapidly, with key market players such as GE, 3D Systems Inc, and Stratasys operating extensively in this sector. With a consistent need to produce quality prints, often with a bespoke nature, additive manufacturing is a perfect technology to accommodate the personalised need for certain medical products. There have also been advancements in the area of bioprinting.

Hypersonics
Companies like Castheon and Amaero are leading the way with offering high quality refractory metals for hypersonic technology. There is significant funding being channelled into hypersonics, and in 2024 The Pentagon requested $11 billion for long-range missiles, which included hypersonic weapons.

Decrease in Investment
In March 2024, AMT (*The Association for Manufacturing Technology*) reported a 44% decrease in global venture capital investment in the additive manufacturing industry, a large decline in comparison to the same report a year earlier, which had recorded a 36.7% growth of global venture capital investment. According to the AMPOWER *Venture Capital in Additive Manufacturing Report* that was published in February 2024, states 'the downturn of publicly traded AM companies has cast a shadow over the fundraising endeavors of all AM start ups. Investors are looking less enthusiastic into the future of AM market development and therefore securing funding has become more difficult.'

WHAT THE INDUSTRY EXPERTS THINK

Kensington Additive asked some of the most influential figures in the additive manufacturing industry their thoughts on the market, the opportunities and challenges it presents, as well as the predictions for 2025. Here is what they had to say.

Joseph Crabtree

Founder & CEO of Additive Manufacturing Technologies

"The 3D printing market is facing significant challenges, with many companies struggling to survive.

Sustainable growth—being cash-flow positive and profitable—is now the key to success. Without adhering to these financial norms, companies will not endure.

The market is oversaturated and not expanding rapidly, so consolidation and attrition are inevitable. Only financially robust companies with true product-market fit—those genuinely solving real problems—will survive in this tough landscape."

Brian Matthews

Founder & CEO of ADDiTEC

"The industry is about to enter an exciting new-era fuelled by new mature technologies and comprehensive consolidation.

This transition marks a significant departure from recent years with a tremendous number of companies offering similar products and services. To stand out in this transition you need unique products and superior technologies, which is what we are delighted to have been building at ADDiTEC, creating value for the long term."

WHAT THE INDUSTRY EXPERTS THINK

Jacob Rindler

Director of Materials & Manufacturing at Castheon

"The ability to attract and retain talent is one of the biggest hurdles to achieving growth.

The explosion of remote roles is challenging for companies manufacturing products that require onsite presence.

Development of local talent pipelines will continue growing in importance as is partnering with talent organizations who can help identify suitable experienced candidates."

Rick Neff

3D Printing Influencer, Technical and Marketing Consultant.

"Overall the industry is growing in capacity and technologies at an amazing rate. Some of the big companies are losing money and are grabbing headlines by looking for efficiencies with mergers or headcount cuts.

While some investors are disappointed with 10% - 20% growth, AM is outperforming most manufacturing technologies.

At IMTS (The International Manufacturing Technology show) in Chicago, many AM companies noted that they were part of the manufacturing community offering proven technologies to manufacture durable parts at production rates. The AM industry has expanded beyond the model and prototyping stage through tooling and into production."

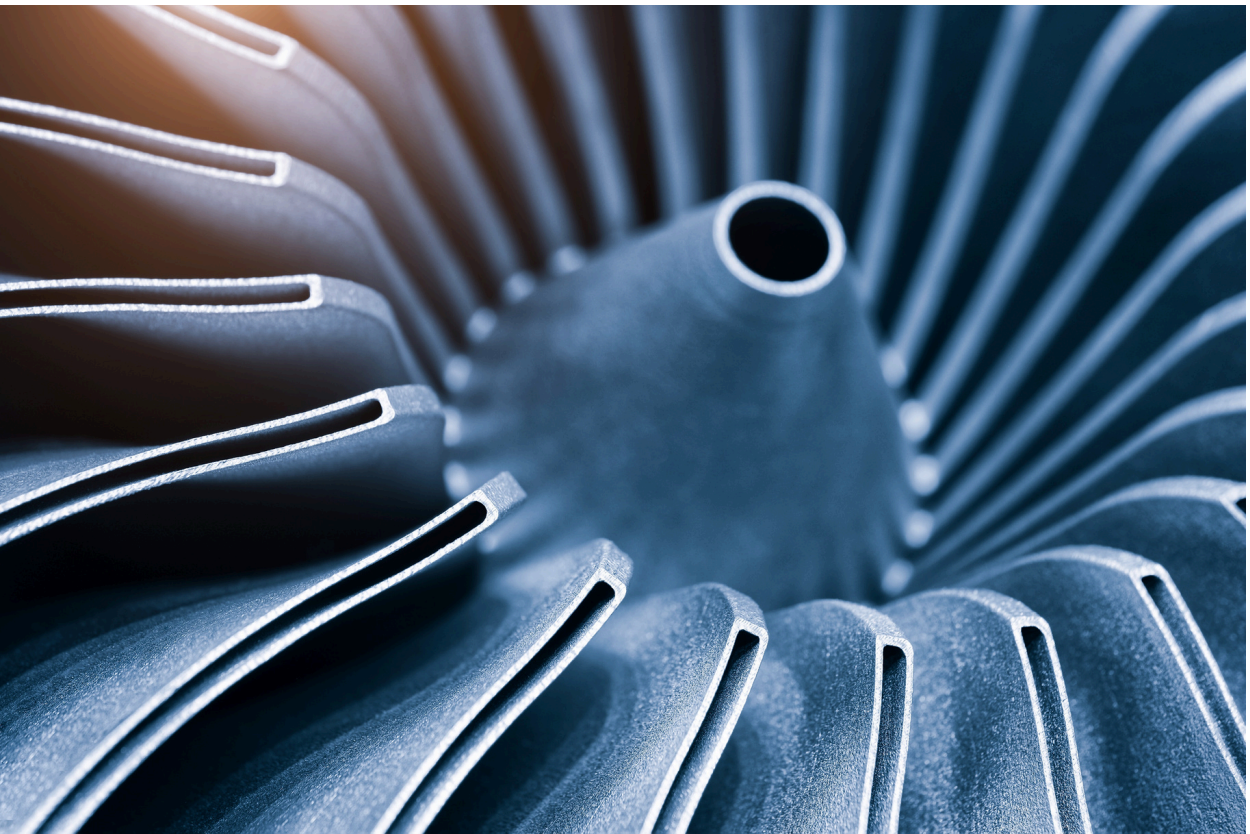
WHAT THE INDUSTRY EXPERTS THINK

Blake Teipel
Additive Manufacturing Advisor

“In 2025, I think it would be expected that there will be continued uncertainty, overall. But this time I think it will be due to the emergence of the new world order in Nano Dimension which will have to digest two of the previous heavyweights nearly simultaneously, which is both an opportunity with uniquely large surface area but a commensurately challenging decision-set around deciding, and then announcing, which product lines to promote, and which to kill.

I would imagine that the Defense space in the US and maybe even NATO, will continue to be a major driver of innovation and adoption.

Another open question is really whether the incoming Trump2.0 administration may yet deliver actual value to the American working class through continued emphasis on the industrial base...all of which portends well in the ~5-year horizon."



HIRING CHALLENGES

In 2024, several key hiring challenges have emerged, some of which are longstanding while others are relatively new. Recognizing these potential barriers is essential before developing a hiring strategy, as your approach may need to account for the following issues:

Evolving Technologies
3D printing is an innovative field that constantly evolves with new materials, techniques, and software. Many educational programs have not kept pace with these advancements, leaving a gap between the skills new graduates possess and what employers require.

Lack of Specialized Training
While general engineering and manufacturing skills are valuable, AM requires specific knowledge in areas such as design for additive manufacturing (DfAM), materials science (e.g., metals and polymers used in 3D printing), and advanced software skills. These specialized skills are not widely available in conventional engineering programs, leading to a shortage of talent that is fully equipped for the industry.

Cross-Disciplinary Expertise
AM roles often require knowledge that spans multiple disciplines, including engineering, software development, materials science, and operations. This cross-disciplinary expertise is difficult to cultivate, and few candidates have both the breadth and depth of knowledge that companies need, particularly for senior and leadership roles.

Fear of Job Security
Given the state of the AM market in 2024, and mass company lay offs, candidates understandably are being selective of which company they consider for their next role. Job and financial security is a top priority, so companies will need to offer reassurance and a solid future vision to interest talented individuals to join the team.

Geographical Imbalance
In certain regions, such as North America and Europe, there are clusters of AM activity (e.g., research centers, manufacturing hubs), but the availability of talent does not always align geographically. This makes it harder for companies in emerging markets or less established hubs to attract and retain skilled professionals.

Summary
Bridging the skills gap will require more targeted education and training programs, company-led upskilling initiatives, and efforts to promote cross-disciplinary learning to meet the industry's evolving demands.

UK & EUROPE

A summary of the Additive Manufacturing market in the UK & Europe.

UK & EUROPE

MARKET SIZE

UK

According to the *Mordor Intelligence Report*, the United Kingdom 3D printing market is projected to reach USD 0.66 billion in 2024, with an expected increase to USD 1.15 billion by 2029, growing at a compound annual growth rate (CAGR) of 11.70% over the forecast period (2024-2029).

In the past five years, greater investment in research and development has fuelled innovation and driven demand for 3D printing. The government has allocated over USD 200 million to additive manufacturing, aiming to increase its global market share from 5% to 8% by 2025, positioning 3D printing as a key contributor to the British economy post-Brexit.

For small and medium sized businesses which are typically involved in design, commonly view prototyping as a costly pre-manufacturing step. Misunderstandings about prototypes, limited technical expertise, and the absence of established process controls are factors that could hinder market growth.

EU

The European 3D printing market is projected to grow from USD 6 billion in 2024 to USD 11.54 billion by 2029, reflecting a CAGR of 14% over this period.

Currently, one-third of large German industrial companies utilize 3D printing, with two-thirds having already experimented with the technology. This high adoption rate presents significant growth opportunities for market players looking to expand within Germany.

The technology's strong presence is evident across key sectors like healthcare and aerospace, where adoption rates are climbing steadily. In aerospace, 3D printing is optimizing production processes, with manufacturers investing billions in using metal powders to produce components such as turbine blades, jet engine nozzles, and structural parts.

UK & EUROPE

COMMERCIAL ROLES

ROLE	EU	UK
Sales Executive	€50k - €70k	£30k - £45k
Sales Manager	€80k - €115k	£40k - £65k
Sales Director	€100k - €140k	£70k - £100k
Business Development Executive	€40k - €55k	£30k - £45k
Business Development Manager	€80k - €110k	£45k - £70k
Business Development Director	€90k - €135k	£75k - £100k
Marketing Specialist	€40k - €60k	£30k - £40k
Marketing Manager	€60k - €85k	£40k - £60k
Marketing Director	€80k - €110k	£70k - £80k
Account Manager	€60k - €90k	£30k - £50k

EXECUTIVE ROLES

ROLE	EU	UK
Managing Director	€150k - €220k	£100k - £120k
Vice President	€170k - €250k	£120k - £160k
C-Suite	€200k - €280k	£120k - £200k

UK & EUROPE

ENGINEERING & TECHNICAL

ROLE	EU	UK
Additive Manufacturing Engineer	€40k - €70k	£30k - £50k
Electrical Engineer	€45k - €60k	£40k - £50k
Senior Electrical Engineer	€60k - €80k	£45k - £60k
Mechanical Engineer	€50k - €70k	£45k - £55k
Senior Mechanical Engineer	€80k - €100k	£55k - £75k
Process Engineer	€60k - €90k	£42k - £50k
Materials Engineer	€50k - €65k	£45k - £50k
Materials Manager	€70k - €100k	£50k - £65k
DfAM Engineer	€40k - €55k	£35k - £45k
Quality Engineer	€45k - €65k	£40k - £50k
Quality Manager	€65k - €75k	£50k - £65k
Operations Manager	€80k - €150k	£65k - £85k
Engineering Manager	€80k - €150k	£70k - £90k

UK & EUROPE

SERVICE

ROLE	EU	UK
Applications Engineer	€70k - €100k	£40k - £60k
Applications Manager	€80k - €120k	£60k - £80k
Field Service Engineer	€55k - €100k	£35k - £45k
Service Manager	€90k - €135k	£50k - £60k
Customer Success Manager	€70k - €100k	£50k - £60k

SOFTWARE

ROLE	EU	UK
Software Engineer	€55k - €75k	£45k - £60k
Senior Software Engineer	€75k - €100k	£65k - £85k
Robotics Engineer	€60k - €80k	£50k - £60k
Software Manager	€95k - €130k	£70k - £100k

NORTH AMERICA

A summary of the Additive Manufacturing market in the United States.

NORTH AMERICA

MARKET SIZE

The North American 3D printing market, according to *Spherical Insights*, valued at USD 4.46 billion in 2022, is on a robust growth trajectory, projected to reach USD 16.59 billion by 2032. This growth represents a compound annual growth rate (CAGR) of 15.7% from 2022 through 2032, making North America the fastest-growing region in the global 3D printing sector over this forecast period.

The North American 3D printing market is home to a wide range of companies offering 3D printers, materials, and related services. Many of these businesses have expanded their product lines through strategic acquisitions and partnerships. Additionally, the U.S. Federal Aviation Administration (FAA) anticipates the increasing relevance of additive manufacturing and is exploring regulatory approaches to effectively oversee this production method.

Government agencies like NASA and the Canadian Space Agency (CSA) have recognized that substantial investments in 3D printing technologies can greatly advance space applications and zero-gravity technology development. These investments are driving the growth of the North American 3D printing market.

NORTH AMERICA

COMMERCIAL ROLES

ROLE	EAST	WEST	CENTRAL & MOUNTAIN
Sales Executive	$70k - $110k	$80k - $115k	$80k - $100k
Sales Manager	$110k - $150k	$120k - $160k	$110k - $150k
Sales Director	$150k - $200k	$150k - $200k	$140k - $200k
BD Executive	$80k - $120k	$90k - $120k	$70k - $100k
BD Manager	$100k - $160k	$120k - $180k	$90k - $150k
BD Director	$150k - $200k	$120k - $210k	$100k - $180k
Marketing Specialist	$80k - $100k	$90k - $110k	$80k - $100k
Marketing Manager	$100k - $130k	$110k - $140k	$100k - $130k
Marketing Director	$150k - $250k	$150k - $250k	$170k - $250k
Account Manager	$80k - $140k	$80k - $120k	$70k - $100k

EXECUTIVE ROLES

ROLE	EAST	WEST	CENTRAL & MOUNTAIN
Vice President	$230k - $300k	$250k - $300k	$190k - $280k
C-Suite	$280k - $350k	$290k - $380k	$250k - $325k

NORTH AMERICA

ENGINEERING & TECHNICAL

ROLE	EAST	WEST	CENTRAL & MOUNTAIN
AM Engineer	$80k - $130k	$90k - $130k	$75k - $100k
Electrical Engineer	$90k - $120k	$90k - $130k	$80k - $100k
Senior Electrical Engineer	$120k - $170k	$120k - $180k	$100k - $150k
Mechanical Engineer	$95k - $130k	$100k - $150k	$80k - $110k
Senior Mechanical Engineer	$140k - $180k	$150k - $190k	$130k - $170k
Process Engineer	$100k - $130k	$100k - $140k	$90k - $130k
Materials Engineer	$120k - $170k	$120k - $170k	$100k - $150k
Materials Manager	$150k - $200k	$150k - $200k	$140k - $180k
Quality Engineer	$85k - $125k	$100k - $125k	$80k - $120k
Quality Manager	$120k - $190k	$130k - $180k	$120k - $160k
Operations Manager	$150k - $200k	$160k - $200k	$150k - $180k
Engineering Manager	$150k - $200k	$140k - $180k	$140k - $170k

NORTH AMERICA

SERVICE

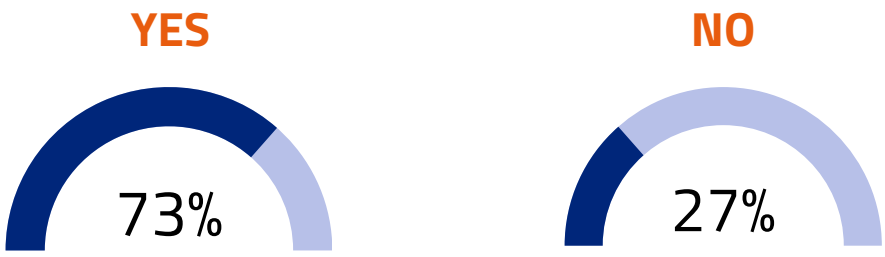
ROLE	EAST	WEST	CENTRAL & MOUNTAIN
Applications Engineer	$100k - $170k	$120k - $180k	$100k - $150k
Applications Manager	$140k - $200k	$140k - $200k	$120k - $160k
Field Service Engineer	$110k - $145k	$100k - $150k	$80k - $120k
Service Manager	$120k - $140k	$120k - $150k	$120k - $140k
Customer Success Manager	$120k - $150k	$130k - $170k	$120k - $150k

SOFTWARE

ROLE	EAST	WEST	CENTRAL & MOUNTAIN
Software Engineer	$110k - $150k	$120k - $160k	$100k - $140k
Senior Software Engineer	$150k - $200k	$150k - $180k	$130k - $170k
Robotics Engineer	$80 - $140k	$100k - $160k	$80k - $120k
Software Manager	$180k - $250k	$200k - $260k	$180k - $220k

USEFUL STATISTICS

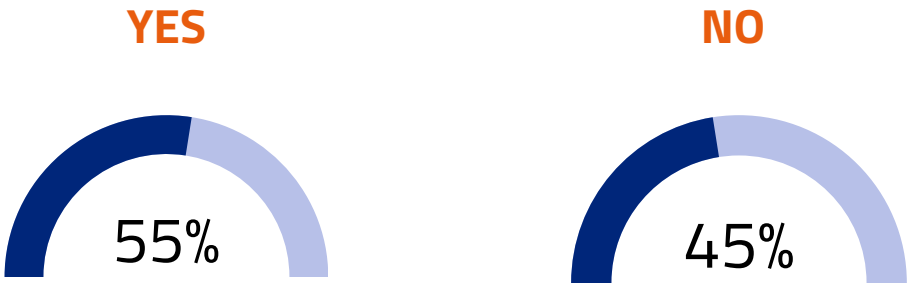
ARE CANDIDATES WILLING TO RELOCATE IN THE UNITED STATES?



*Data collected from Kensington Additive's CRM System

Not all candidates are asked if they would consider relocating, as some roles do not necessitate a move. However, among those who were asked, an impressive 73% indicated they would be open to relocation for their next role. Given that the majority of roles Kensington Additive fills are senior-level positions, this demonstrates a strong willingness among candidates to relocate for career advancement.

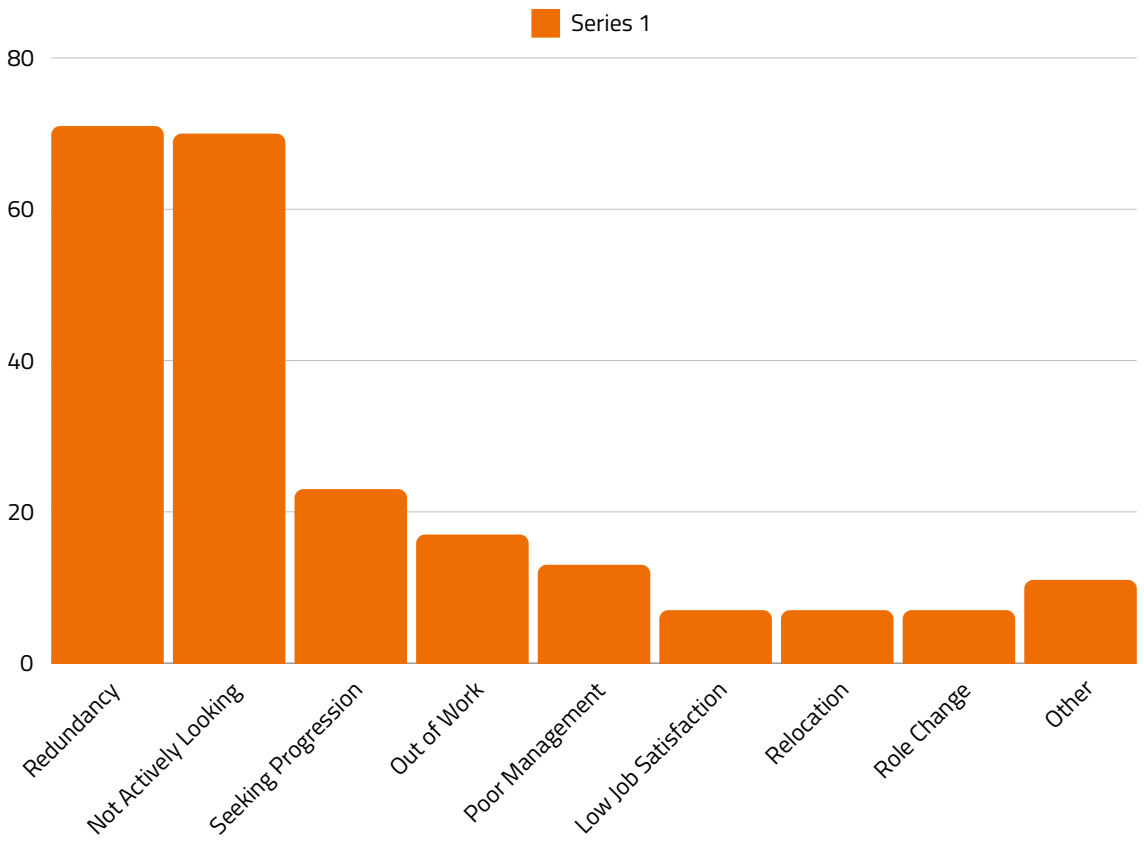
ARE CANDIDATES WILLING TO RELOCATE IN EUROPE?



*Data collected from Kensington Additive's CRM System

In previous Salary Reports, respondents from the EU generally showed a preference to remain in their current location. However, given the current economic climate, candidates seeking opportunities in the additive manufacturing market may now need to be more open to relocation in order to access suitable positions.

WHAT ARE THE REASONS CANDIDATES ARE LOOKING FOR A NEW JOB?

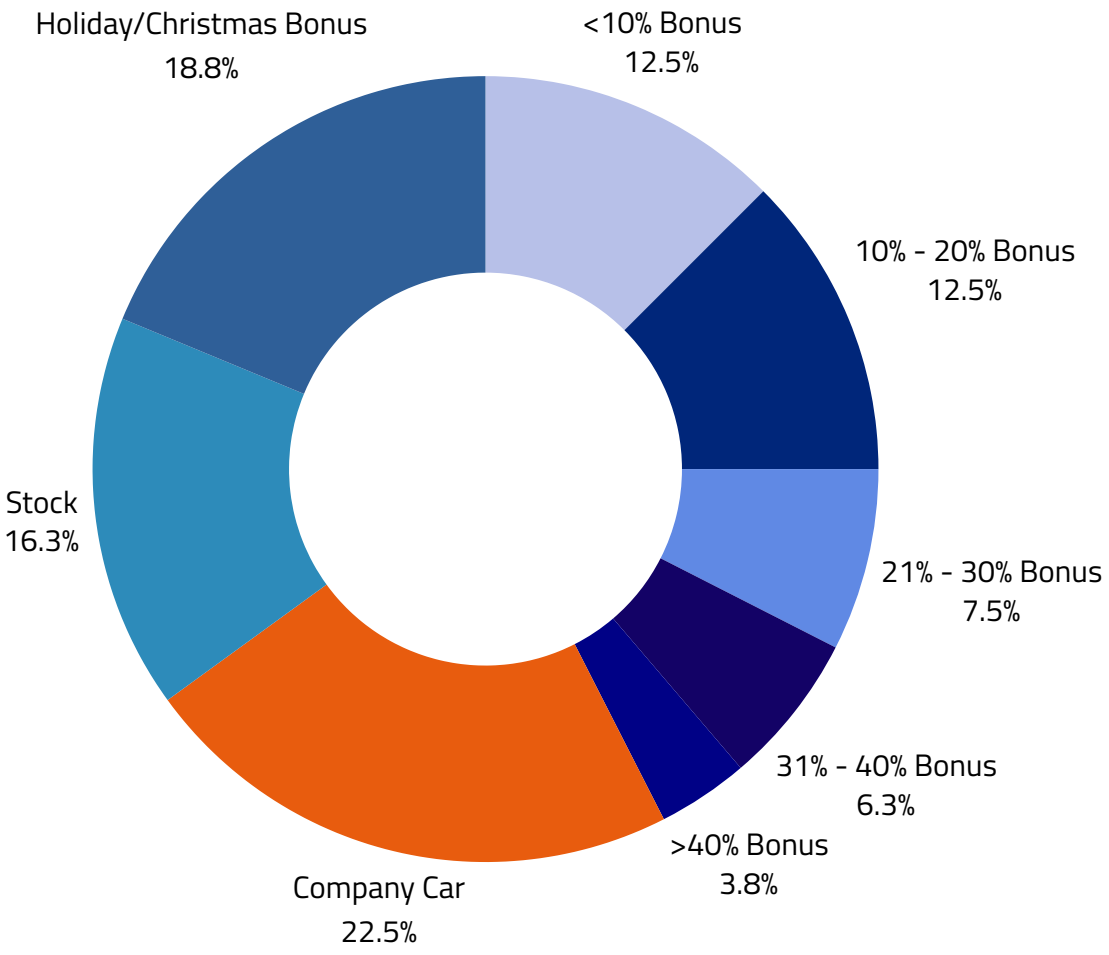


*Data collected from Kensington Additive's CRM System

The survey results indicate that most candidates were not actively seeking new employment. Notably, the primary reason among those who were job hunting was redundancy, marking the first instance of this trend in Kensington Additive's Salary Reports. This shift reflects the current state of the industry and broader economic conditions. Additional reasons, not represented in the graph above, include:

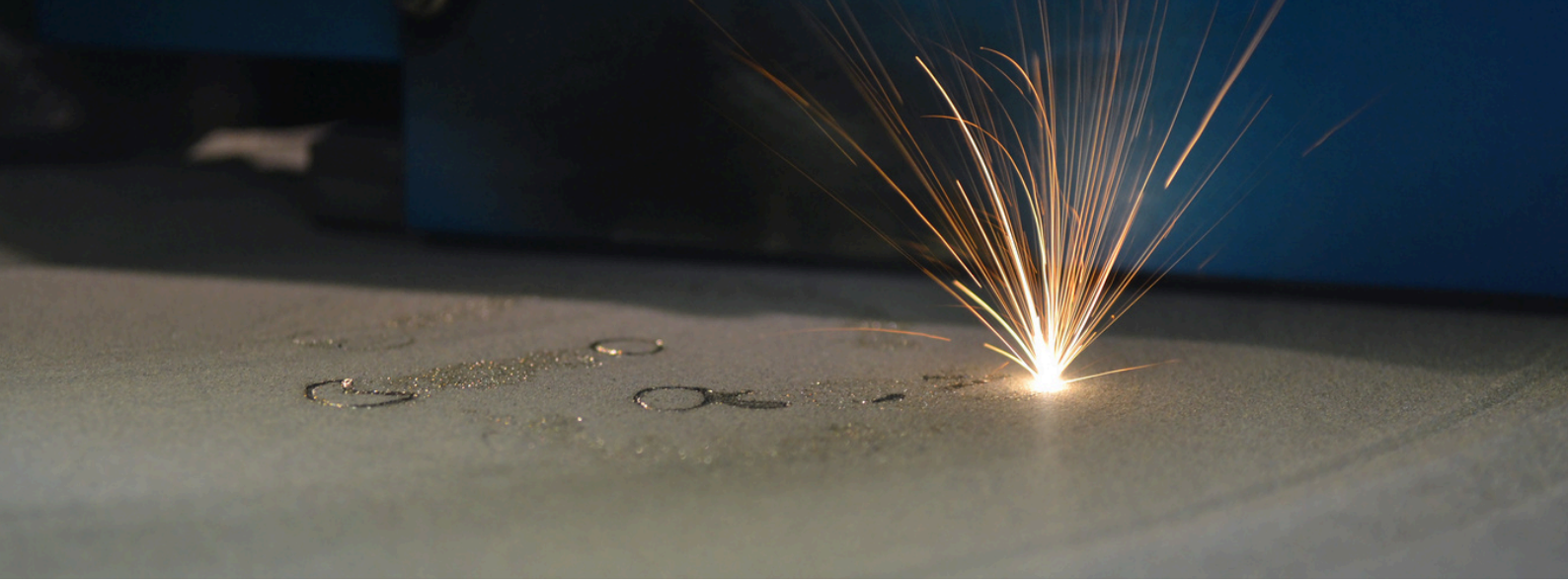
- Wanting a new challenge
- The job wasn't what candidates were told it would be
- Poor work-life balance
- Bad culture
- Salary Increase
- Company relocation

WHAT ARE THE MOST POPULAR BENEFITS?



*Data collected from Kensington Additive's CRM System

Hybrid working is a highly requested benefit, along with company cars for commercial and service roles, and stock options for Directors, Vice Presidents, and C-Suite positions.
In the EU, company cars are significantly more popular than in the United States, where air travel is more prevalent and road travel is less frequent than across Europe.



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OUR MISSION & VALUES

OUR MISSION IS TO ACHIEVE OUR
CLIENT'S MISSION, BY HIRING
THE WORLD'S **BEST TALENT**

QUALITY.

"Quality is not an act, it's a habit." - *Aristotle*

COMMITMENT.

Decide. Commit. Succeed.

COMMUNICATION.

We listen to understand, not just to reply.

KNOWLEDGE.

Learn, Know & Grow.

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