

The State of Additive Manufacturing in ASEAN Today



1. Penetration in ASEAN is relatively small

5 - 7% of Asia's AM spend at \$3.8 billion for 2019
220 - 270 industrial printer installed base

2. Singapore, Malaysia and Thailand account for 80%



3. Immense talent driving local AM innovations



Prosthetics



Farming Tools



Public housing



Membrane

4. Huge potential for AM market in ASEAN

20% ASEAN GDP in manufacturing

50 million ASEAN regional manufacturing workforce

AM near term growth potential (in line with global average)

3x

Opportunities Moving Forward

5. Five growth opportunities

\$100 billion in economic value and 3 - 4 million jobs for AM in ASEAN



Reducing import dependence



Improving competitiveness of key sectors



Empowering local entrepreneurs



Advancing Industrie 4.0 & skill development



Increasing sustainability through DfAM

6. Few barriers exist:

Know-how: Many policymakers and business leaders are not fully aware on how to use AM, its effectiveness and creating commercial value



Tech: Material costs and diversity, printing speed, build chamber size, stability and repeatability of the process, availability of standards and IP regulations



7. Businesses and governments need to work together to unlock potential



Regional roadmap for adoption and scale-up of AM ecosystem

Government funding & support to build up AM infrastructure, policies and capabilities



Extensive public-private partnerships with government, institutes, manufacturers and ecosystem experts

ASEAN is at a cross-roads as AM and the broader Fourth Industrial Revolution drives fundamental changes to the region's manufacturing competitiveness and its ecosystem.

The time to act is now!