



**'25
MANUFUTURE
CONFERENCE**

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CECIMO in one page

CECIMO represents
1500
industrial enterprises in
Europe (EU + UK + EFTA +
Turkey)

Over **80%**
of which are
SMEs

CECIMO covers
97% of
machine tool
production
the total
in Europe and about
34% worldwide

CECIMO accounts for more than
150.000 employees



15
national
associations
of machine
tool builders

What we do

- Austria:** **FMSE**
Metalltechnik Austria
Die Metalltechnische Industrie
- Belgium:** **AGORIA**
Association of the Technology Industry
- Czech Republic:** **SST**
Svaz Strojirenské Technologie
- Denmark:** **The Manufacturing Industry**
a part of the Confederation of Danish Industry
- Finland:** **Technology Industries of Finland**
- France:** **Evolis**
Organisation professionnelle des biens d'équipement

- Germany:** **VDW**
Verein Deutscher Werkzeugmaschinenfabriken e.V.
- Italy:** **UCIMU**
Associazione dei costruttori Italiani di macchine utensili robot e automazione
- Netherlands:** **FPT-VIMAG**
Federatie Productie Technologie / Sectie VIMAG
- Portugal:** **AIMMAP**
Associação dos Industriais Metalúrgicos, Metalomecânicos e Afins de Portugal
- Spain:** **AFM Cluster**
Asociación española de fabricantes de máquinas-herramienta, accesorios, componentes y herramientas

- Sweden:** **MTAS**
Machine and Tool Association of Sweden
- Switzerland:** **SWISSMEM**
Die Schweizer Maschinen-, Elektro- und Metall-Industrie
- Turkey:** **MIB**
Makina Imalatçileri Birliği
- United Kingdom:** **MTA**
The Manufacturing Technologies Association

CECIMO REPRESENTS
globally the common position of European Manufacturing Technologies, with a primary focus on machine tools and additive manufacturing.

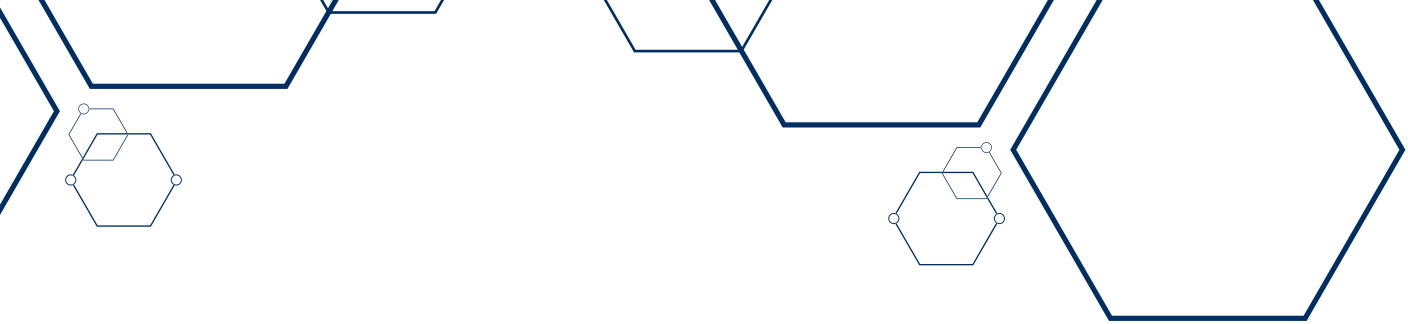
CECIMO ADVOCATES
to contribute to a business environment that markets the most competitive manufacturing solutions worldwide.

CECIMO PROVIDES
a Market Intelligence Service: we gather, analyse and distribute statistical and economic data and reports.

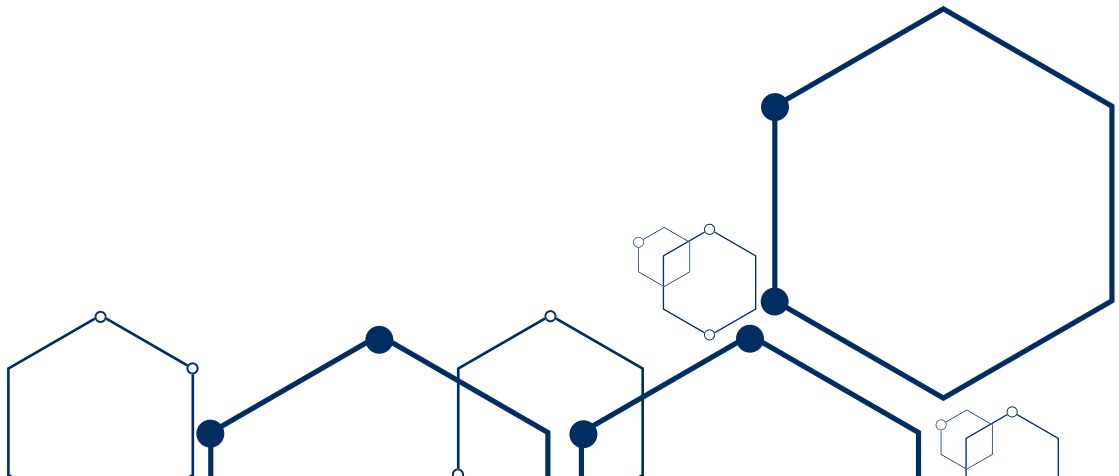
CECIMO PROMOTES
our sectors through the EMO exhibitions, the world benchmark for Enabling Manufacturing Technologies.

CECIMO ENCOURAGES
research and innovation driven by the present and future needs of the market. CECIMO contributes to shaping EU research and innovation policies.

CECIMO WORKS ON
global standards to promote a single European market open to global competition, engaging in the European and International standardisation bodies.



**Advanced manufacturing is key sector
for EU competitiveness, autonomy and
prosperity!**



STATUS

Global Advanced Manufacturing: Key Insights

- Highly concentrated: **72% of firms** are in **China**, the **US**, and the **EU**
- **China leads**, hosting **45% of global firms** with +570% growth (2009–2022)
- **EU growth is solid**, led by Germany, Spain, France, and Italy, but still behind global rivals

STRENGTHS

High innovation capacity

- The EU applied for 18,000 patents in advanced manufacturing tech (2009 - 2023).

Advanced manufacturing technologies

- The EU has a competitive edge globally in Robotics, IoT, and Extended Reality.

Key international player

- The EU controls ~1/3 of foreign-owned advanced manufacturing firms globally.

CHALLENGES

Rapid global competition

China +16% annual growth | US +4% | EU Slower pace

Innovation gap

China – 66% | EU – 30% | US – 20% *

**Firms with ≥1 advanced manufacturing patent (%)*

Investment gap

Global venture capital distribution:
EU – 4% | US – 47% | China – 39%

Technological lag

EU falling behind in AI & Robotics

IMPORTANCE OF ADVANCE MANUFACTURING

Competitiveness

01

Boosts productivity, flexibility, and quality across European industries, helping firms remain globally competitive.



Resilience

02

Strengthens Europe's strategic autonomy by securing supply chains and enabling local, sustainable production.



Innovation

03

Drives R&D in robotics, AI, digital twins, and AM, turning research into industrial value.



Jobs and Skills

04

Creates high-value employment and demands new skills in digitalization, sustainability, and advanced processes.



Sustainability

05

Reduces waste, energy use, and emissions—supporting the EU's net-zero and circular-economy objectives.



AM drives digital & green transitions, supporting re-industrialisation, strategic autonomy, and regional innovation.

TIME TO ACT

Manufacturing must be recognized as a stand-alone sector

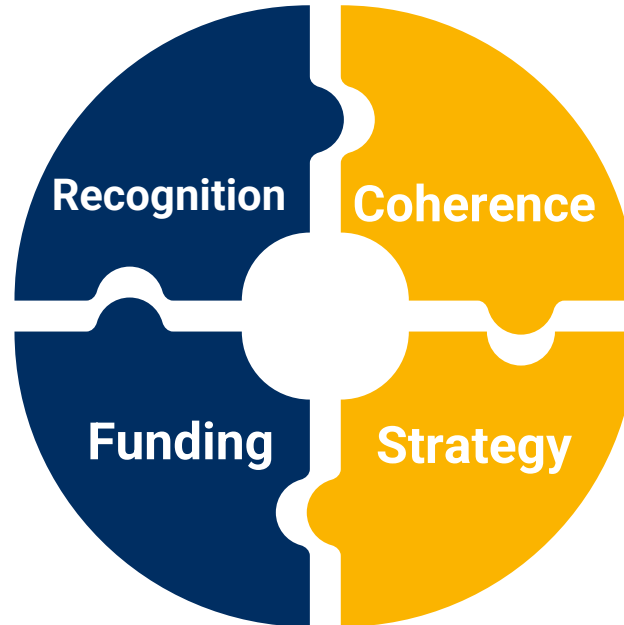
01

EU industrial policies overlooks manufacturing technologies role as critical enablers of the green transition and energy autonomy

02

Advanced Manufacturing cannot be left out of EU budget priorities

03



04

The next MFF (2028–2034) must strategically support Europe's competitiveness, reindustrialisation, and technological sovereignty

05

Industrial technology funding is currently fragmented across multiple programmes, Europe needs coherence

06

Strong, visible support for production technologies is essential to complete Europe's industrial puzzle

MAKE THE PUZZLE COMPLETE

OUR VISION



STEP 1: ADVANCED MANUFACTURING: A KEY PILLAR OF EUROPEAN INDUSTRIAL GROWTH

- Manufacturing technologies **form the foundation of Europe's industrial competitiveness.**
- They are essential for **productivity, innovation, resilience and reduce dependencies** across the European economy.



STEP 2: ADVANCED MANUFACTURING TECHNOLOGIES - STRATEGIC ENABLERS

- The sector should not be viewed as a mere support industry or supply-chain link, but as a **strategic enabler** of industrial capacity.
- Strong advanced manufacturing technology sector can bring significant added value to aerospace, healthcare, construction, and defence, all of which are essential for Europe's **competitiveness and security.**

ACTIONS

- 01 **Boost demonstrators and pilot lines (TRL 7–9) to accelerate market uptake**
- 02 **Align EU programmes (EIC, Digital Europe, Cohesion, InvestEU) for deployment & scale-up**
- 03 **Invest in skills: STEM, vocational training, lifelong learning for AMTs**
- 04 **Leverage EU funds & private capital via clusters and public–private partnerships**
- 05 **Double up — not double down — on Made in Europe**
- 06 **Support brownfield upgrades for faster, cost-effective industrial transformation**
- 07 **Simplify SME access through harmonised rules & cascade funding**
- 08 **Coordinate funding streams to close gaps and strengthen SME participation**

THANK YOU!

