

Hybrid Additive Manufacturing Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Materials (Metal Additive Manufacturing, Polymer Additive Manufacturing) By Processes (Directed Energy Deposition (DED), Laser Metal Deposition (LMD), Blow Powder Deposition (BPD), By End-User Industry (Automotive, Retail, Energy, Manufacturing, Healthcare, Others), By Region & Competition, 2021-2031F

Market Report | 2026-01-05 | 185 pages | TechSci Research

AVAILABLE LICENSES:

- Single User License \$4500.00
- Multi-User License \$5500.00
- Custom Research License \$8000.00

Report description:

Market Overview

The Global Hybrid Additive Manufacturing Market will grow from USD 121.78 Billion in 2025 to USD 297.63 Billion by 2031 at a 16.06% CAGR. Hybrid additive manufacturing integrates additive material deposition and subtractive machining capabilities within a single machine tool environment to produce finished components.

Key Market Drivers

The rising demand for repair and remanufacturing of high-value components acts as a primary catalyst for the market, particularly within the defense and heavy industry sectors. By enabling the restoration of worn parts such as turbine blades, molds, and dies through direct energy deposition followed by precision machining, hybrid systems extend component lifecycles and significantly reduce replacement costs. This capability is increasingly prioritized by national defense strategies to ensure supply chain resilience and operational readiness.

Key Market Challenges

The high initial capital investment required for hybrid additive manufacturing systems constitutes a formidable barrier that directly restricts market expansion. Acquiring these complex machines involves substantial upfront expenditure, often exceeding

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

the budgets of small and medium-sized enterprises (SMEs) which form a large portion of the industrial base. This financial burden is compounded by the need for specialized CAM software and the associated costs of training personnel to navigate the steep learning curve.

Key Market Trends

The adoption of in-situ metrology for closed-loop quality control is emerging as a critical trend, fundamentally shifting verification from post-production assessments to real-time process monitoring. In hybrid systems, where additive and subtractive operations occur sequentially, the ability to detect and correct defects during the deposition phase is vital for ensuring the structural integrity of complex aerospace and defense components. This capability significantly mitigates the risk of burying flaws under subsequent layers, thereby reducing scrap rates and accelerating the certification of safety-critical parts.

Key Market Players

- DMG MORI Co., Ltd.
- Mazak Corporation
- Stratasys Ltd
- Matsuura Machinery Corporation
- Voxeljet AG
- SLM Solutions Group AG
- Optomec Inc
- EOS GmbH
- Renishaw plc
- 3D Systems Corporation

Report Scope:

In this report, the Global Hybrid Additive Manufacturing Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

- Hybrid Additive Manufacturing Market, By Processes:

- o Directed Energy Deposition (DED)
- o Laser Metal Deposition (LMD)
- o Blow Powder Deposition (BPD)

- Hybrid Additive Manufacturing Market, By Region:

- o North America
 - United States
 - Canada
 - Mexico
- o Europe
 - France
 - United Kingdom
 - Italy
 - Germany
 - Spain
- o Asia Pacific
 - China
 - India
 - Japan
 - Australia
 - South Korea
- o South America
 - Brazil
 - Argentina

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- Colombia
- o□Middle East & Africa
- South Africa
- Saudi Arabia
- UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Hybrid Additive Manufacturing Market.

Available Customizations:

Global Hybrid Additive Manufacturing Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

- Detailed analysis and profiling of additional market players (up to five).

Table of Contents:

1. Product Overview
 - 1.1. Market Definition
 - 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations
2. Research Methodology
 - 2.1. Objective of the Study
 - 2.2. Baseline Methodology
 - 2.3. Key Industry Partners
 - 2.4. Major Association and Secondary Sources
 - 2.5. Forecasting Methodology
 - 2.6. Data Triangulation & Validation
 - 2.7. Assumptions and Limitations
3. Executive Summary
 - 3.1. Overview of the Market
 - 3.2. Overview of Key Market Segmentations
 - 3.3. Overview of Key Market Players
 - 3.4. Overview of Key Regions/Countries
 - 3.5. Overview of Market Drivers, Challenges, Trends
4. Voice of Customer
5. Global Hybrid Additive Manufacturing Market Outlook
 - 5.1. Market Size & Forecast
 - 5.1.1. By Value
 - 5.2. Market Share & Forecast
 - 5.2.1. By Processes (Directed Energy Deposition (DED), Laser Metal Deposition (LMD), Blow Powder Deposition (BPD))
 - 5.2.2. By Region
 - 5.2.3. By Company (2025)
 - 5.3. Market Map
6. North America Hybrid Additive Manufacturing Market Outlook
 - 6.1. Market Size & Forecast
 - 6.1.1. By Value

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 6.2. Market Share & Forecast
 - 6.2.1. By Processes
 - 6.2.2. By Country
- 6.3. North America: Country Analysis
 - 6.3.1. United States Hybrid Additive Manufacturing Market Outlook
 - 6.3.1.1. Market Size & Forecast
 - 6.3.1.1.1. By Value
 - 6.3.1.2. Market Share & Forecast
 - 6.3.1.2.1. By Processes
 - 6.3.2. Canada Hybrid Additive Manufacturing Market Outlook
 - 6.3.2.1. Market Size & Forecast
 - 6.3.2.1.1. By Value
 - 6.3.2.2. Market Share & Forecast
 - 6.3.2.2.1. By Processes
 - 6.3.3. Mexico Hybrid Additive Manufacturing Market Outlook
 - 6.3.3.1. Market Size & Forecast
 - 6.3.3.1.1. By Value
 - 6.3.3.2. Market Share & Forecast
 - 6.3.3.2.1. By Processes
- 7. Europe Hybrid Additive Manufacturing Market Outlook
 - 7.1. Market Size & Forecast
 - 7.1.1. By Value
 - 7.2. Market Share & Forecast
 - 7.2.1. By Processes
 - 7.2.2. By Country
 - 7.3. Europe: Country Analysis
 - 7.3.1. Germany Hybrid Additive Manufacturing Market Outlook
 - 7.3.1.1. Market Size & Forecast
 - 7.3.1.1.1. By Value
 - 7.3.1.2. Market Share & Forecast
 - 7.3.1.2.1. By Processes
 - 7.3.2. France Hybrid Additive Manufacturing Market Outlook
 - 7.3.2.1. Market Size & Forecast
 - 7.3.2.1.1. By Value
 - 7.3.2.2. Market Share & Forecast
 - 7.3.2.2.1. By Processes
 - 7.3.3. United Kingdom Hybrid Additive Manufacturing Market Outlook
 - 7.3.3.1. Market Size & Forecast
 - 7.3.3.1.1. By Value
 - 7.3.3.2. Market Share & Forecast
 - 7.3.3.2.1. By Processes
 - 7.3.4. Italy Hybrid Additive Manufacturing Market Outlook
 - 7.3.4.1. Market Size & Forecast
 - 7.3.4.1.1. By Value
 - 7.3.4.2. Market Share & Forecast
 - 7.3.4.2.1. By Processes
 - 7.3.5. Spain Hybrid Additive Manufacturing Market Outlook

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 7.3.5.1. Market Size & Forecast
 - 7.3.5.1.1. By Value
- 7.3.5.2. Market Share & Forecast
 - 7.3.5.2.1. By Processes
- 8. Asia Pacific Hybrid Additive Manufacturing Market Outlook
 - 8.1. Market Size & Forecast
 - 8.1.1. By Value
 - 8.2. Market Share & Forecast
 - 8.2.1. By Processes
 - 8.2.2. By Country
 - 8.3. Asia Pacific: Country Analysis
 - 8.3.1. China Hybrid Additive Manufacturing Market Outlook
 - 8.3.1.1. Market Size & Forecast
 - 8.3.1.1.1. By Value
 - 8.3.1.2. Market Share & Forecast
 - 8.3.1.2.1. By Processes
 - 8.3.2. India Hybrid Additive Manufacturing Market Outlook
 - 8.3.2.1. Market Size & Forecast
 - 8.3.2.1.1. By Value
 - 8.3.2.2. Market Share & Forecast
 - 8.3.2.2.1. By Processes
 - 8.3.3. Japan Hybrid Additive Manufacturing Market Outlook
 - 8.3.3.1. Market Size & Forecast
 - 8.3.3.1.1. By Value
 - 8.3.3.2. Market Share & Forecast
 - 8.3.3.2.1. By Processes
 - 8.3.4. South Korea Hybrid Additive Manufacturing Market Outlook
 - 8.3.4.1. Market Size & Forecast
 - 8.3.4.1.1. By Value
 - 8.3.4.2. Market Share & Forecast
 - 8.3.4.2.1. By Processes
 - 8.3.5. Australia Hybrid Additive Manufacturing Market Outlook
 - 8.3.5.1. Market Size & Forecast
 - 8.3.5.1.1. By Value
 - 8.3.5.2. Market Share & Forecast
 - 8.3.5.2.1. By Processes
 - 9. Middle East & Africa Hybrid Additive Manufacturing Market Outlook
 - 9.1. Market Size & Forecast
 - 9.1.1. By Value
 - 9.2. Market Share & Forecast
 - 9.2.1. By Processes
 - 9.2.2. By Country
 - 9.3. Middle East & Africa: Country Analysis
 - 9.3.1. Saudi Arabia Hybrid Additive Manufacturing Market Outlook
 - 9.3.1.1. Market Size & Forecast
 - 9.3.1.1.1. By Value
 - 9.3.1.2. Market Share & Forecast

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 9.3.1.2.1. By Processes
- 9.3.2. UAE Hybrid Additive Manufacturing Market Outlook
 - 9.3.2.1. Market Size & Forecast
 - 9.3.2.1.1. By Value
 - 9.3.2.2. Market Share & Forecast
 - 9.3.2.2.1. By Processes
- 9.3.3. South Africa Hybrid Additive Manufacturing Market Outlook
 - 9.3.3.1. Market Size & Forecast
 - 9.3.3.1.1. By Value
 - 9.3.3.2. Market Share & Forecast
 - 9.3.3.2.1. By Processes
- 10. South America Hybrid Additive Manufacturing Market Outlook
 - 10.1. Market Size & Forecast
 - 10.1.1. By Value
 - 10.2. Market Share & Forecast
 - 10.2.1. By Processes
 - 10.2.2. By Country
 - 10.3. South America: Country Analysis
 - 10.3.1. Brazil Hybrid Additive Manufacturing Market Outlook
 - 10.3.1.1. Market Size & Forecast
 - 10.3.1.1.1. By Value
 - 10.3.1.2. Market Share & Forecast
 - 10.3.1.2.1. By Processes
 - 10.3.2. Colombia Hybrid Additive Manufacturing Market Outlook
 - 10.3.2.1. Market Size & Forecast
 - 10.3.2.1.1. By Value
 - 10.3.2.2. Market Share & Forecast
 - 10.3.2.2.1. By Processes
 - 10.3.3. Argentina Hybrid Additive Manufacturing Market Outlook
 - 10.3.3.1. Market Size & Forecast
 - 10.3.3.1.1. By Value
 - 10.3.3.2. Market Share & Forecast
 - 10.3.3.2.1. By Processes
- 11. Market Dynamics
 - 11.1. Drivers
 - 11.2. Challenges
- 12. Market Trends & Developments
 - 12.1. Merger & Acquisition (If Any)
 - 12.2. Product Launches (If Any)
 - 12.3. Recent Developments
- 13. Global Hybrid Additive Manufacturing Market: SWOT Analysis
- 14. Porter's Five Forces Analysis
 - 14.1. Competition in the Industry
 - 14.2. Potential of New Entrants
 - 14.3. Power of Suppliers
 - 14.4. Power of Customers
 - 14.5. Threat of Substitute Products

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

15. Competitive Landscape
 - 15.1. DMG MORI Co., Ltd.
 - 15.1.1. Business Overview
 - 15.1.2. Products & Services
 - 15.1.3. Recent Developments
 - 15.1.4. Key Personnel
 - 15.1.5. SWOT Analysis
 - 15.2. Mazak Corporation
 - 15.3. Stratasys Ltd
 - 15.4. Matsuura Machinery Corporation
 - 15.5. Voxeljet AG
 - 15.6. SLM Solutions Group AG
 - 15.7. Optomec Inc
 - 15.8. EOS GmbH
 - 15.9. Renishaw plc
 - 15.10. 3D Systems Corporation
16. Strategic Recommendations
17. About Us & Disclaimer

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Hybrid Additive Manufacturing Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Materials (Metal Additive Manufacturing, Polymer Additive Manufacturing) By Processes (Directed Energy Deposition (DED), Laser Metal Deposition (LMD), Blow Powder Deposition (BPD), By End-User Industry (Automotive, Retail, Energy, Manufacturing, Healthcare, Others), By Region & Competition, 2021-2031F

Market Report | 2026-01-05 | 185 pages | TechSci Research

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4500.00
	Multi-User License	\$5500.00
	Custom Research License	\$8000.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-03-02"/>
		Signature	<input type="text"/>