



The need for a European Advanced Manufacturing Strategy (EAMS) – and how a European Parliament INI Report can help to make it happen

Advanced Manufacturing is what makes state-of-the-art production processes possible. It is the technological backbone behind the EU's industrial base. Recognised by President von der Leyen as one of the EU's "highest-value sectors" in her State of the Union address¹, Advanced Manufacturing is sharply on the increase. The number of European companies active in it has more than doubled since 2009, from around 1,900 companies to over 4,500 today, generating some 18,000 patent applications during that period².

Advanced industrial capabilities are fundamental for Europe's capacity to produce, innovate and grow in the years to come. By improving productivity, flexibility, quality and resource efficiency, Advanced Manufacturing enables European companies to develop and scale the products on which strategic value chains depend. In particular, Advanced Manufacturing technologies play a critical role for Europe's ability to produce in strategically important areas such as aerospace and defence, nuclear and clean energy, semiconductors, medical technologies and critical infrastructure. In its quest for greater resilience and strategic autonomy, Europe must avoid structural dependencies on external suppliers for essential production technologies and boost its leadership and capabilities in those areas where Europe already possesses strong industrial capabilities, skills and technological know-how.

¹ [2026 State of the Union Address by President von der Leyen](#), 16 September 2026

² https://joint-research-centre.ec.europa.eu/jrc-news-and-updates/advanced-manufacturing-key-eu-competitiveness-2024-09-24_en

This capability is closely embedded in pan-European value chains, including specialised manufacturing-technology suppliers in Switzerland, other EFTA partner countries and the UK. Their continued strength also depends on secure access to key upstream technologies and inputs, notably electronics, semiconductors, critical raw materials and Artificial Intelligence (AI).

More often than not, EU industrial policy tends to follow narrow, scattered, vertical approaches that focus on specific industrial sectors – each at a time, leading to different conditions and prerequisites for industries in different sectors and segments. Such fragmented approaches in industrial policy present not only a structural barrier to innovation and scaling up but also fail to provide support to established European industrial strengths in horizontal enabling technologies, such as machine tools, automation, industrial AI, and robotics. These sectors face increasing competition from countries that combine dedicated long-term strategies with coordinated investment, demand-side support and strategic measures to strengthen domestic industrial capacity and exports.

Our ask: We call on Members of the European Parliament (MEPs) to launch a dedicated own-initiative (INI) Report on Advanced Manufacturing, giving this unique industrial ecosystem a strong strategic recognition and providing a clear political mandate for **the development of a dedicated European Advanced Manufacturing Strategy (EAMS)**, a coherent European approach to strengthen Advanced Manufacturing industrial capacity, competitiveness and deployment, including in the EFTA partners and the UK.

The moment is now: a narrow window remains to sustain & strengthen Europe's tech leadership in Advanced Manufacturing

- **Turning the tide: Europe's lead is eroding.** Today, the EU hosts only around 10% of global Advanced Manufacturing firms, compared to 45% in China, and attracts merely 4% of global venture capital in this area³. **One in five** EU advanced manufacturing companies is foreign controlled. Europe therefore risks losing leadership, ownership and scale in a range of critically important production technologies that are essential for the competitiveness of its industrial base.

³ https://joint-research-centre.ec.europa.eu/jrc-news-and-updates/advanced-manufacturing-key-eu-competitiveness-2024-09-24_en

- **Competitors have moved faster to support Advanced Manufacturing through dedicated, coordinated strategies.** China's state-backed strategy has made it dominant in robotics and mobility manufacturing. The US now treats Advanced Manufacturing technologies as a matter of national security, backed by large-scale investment, reshoring incentives, and a legally mandated National Strategy for Advanced Manufacturing that is renewed every four years⁴. So far, the EU has no equivalent approach to match these strategies.
- **Europe's manufacturing-technology base faces growing pressure.** Recent data show that this pressure extends beyond individual markets, affecting both established manufacturing-technology suppliers and the large-scale deployment and adoption of new production technologies:
 - European machine-tool production fell by -8.6% in 2024, with a further contraction of -6.6% estimated for 2025. Industrial robot installations are also slowing in key EU manufacturing sectors.
 - In 2024, EU automotive manufacturers installed 30,650 industrial robots, a -5% year-on-year decrease, with sharp declines in several major vehicle-producing countries.

These trends risk weakening demand, scale and investment across the manufacturing technologies that are critical to European productivity, high-quality jobs and exports.⁵ If future EU measures are designed too narrowly around EU-based capacity alone, they risk weakening the closely integrated value chains on which Europe's advanced-manufacturing strength depends, including specialised suppliers in associated EFTA countries and the UK.

- **EU industrial policy needs a stronger, more coherent focus on Advanced Manufacturing:** The Net-Zero Industry Act (NZIA), the Automotive Action Plan and the proposed Industrial Accelerator Act (IAA) so far remain largely product- and sector-specific, without a shared and coherent horizontal strategy for those technologies and industrial capabilities needed to produce them across European value chains.

4-Point Plan for a European Advanced Manufacturing Strategy (EAMS) - what a future INI Report should address

- **Explicit recognition of Advanced Manufacturing as a strategic horizontal priority for EU industrial policy**, acknowledging its unique role as an enabler for *all* industrial ecosystems.

⁴ [U.S. National Strategy for Advanced Manufacturing](#) (NSTC, 2022; update in progress for 2026–2030)

⁵ CECIMO Economic Survey and Forecast; International Federation of Robotics, ["EU's Auto Sector Sees Sharp Drop in Robot Adoption"](#), 25 September 2025

- **Development by the European Commission of a comprehensive and coherent European Advanced Manufacturing Strategy (EAMS)**, integrating industrial policy, R&I, investment, skills, trade and key guiding principles for any future regulatory frameworks, while safeguarding the Single Market, remaining technology-neutral and avoiding new administrative burdens for companies.
- **Recognition of Advanced Manufacturing as a research and investment priority in the next Multiannual Financial Framework (MFF) and the EU's research and innovation framework** to mobilise targeted public and private investment, improve access to scale-up finance and support industrial deployment. Horizon Europe should feature a dedicated Public-Private Partnership (PPP) on Advanced Manufacturing in the portfolio.
- **Secure a level playing field and promote fair global competition for Advanced Manufacturing**, including appropriate EU trade defence and deterrence, stronger Market Surveillance and consistent enforcement of EU rules, without increasing the burden on compliant companies.

Addressing the 4-Point Plan will give Advanced Manufacturing a clear place in European industrial policy and help translate Europe's unique technological strengths in these areas into competitive production capacity in the years to come.

CECIMO and **Orgalim**, the two umbrella associations representing European producers of Advanced Manufacturing technologies, stand ready to support the European Parliament with technical expertise and input as this work moves forward.