

Freedonia Focus Reports  
World Collection



# World Industrial Fasteners

November 2016



## Highlights

World Overview and Forecasts  
Demand by Product | Demand by Market

Regional Segmentation and Forecasts  
Regional Shipments Overview | Regional Demand Overview | North America  
Western Europe | Asia/Pacific | Other Regions

Industry Structure  
Industry Composition and Characteristics | Companies Cited

Resources

CLICK TO ORDER  
FULL REPORT  
**BROCHURE**  
CLICK TO ORDER  
FULL REPORT

[www.freedoniafocus.com](http://www.freedoniafocus.com)

## ABOUT THIS REPORT

### Scope & Method

This report forecasts total world demand in 2020 for industrial fasteners by product, market, and major world region in US dollars at the manufacturers' level. Product segments include:

- externally threaded standard
- internally threaded standard
- nonthreaded standard
- application-specific standard
- aerospace-grade.

Excluded from the scope of this report are nails, brads, spikes, tacks, and related items, as well as adhesives and other joining/bonding products, although these are discussed for their potential impact on fastener demand. Nonindustrial-type items such as buttons, paperclips, and zippers are also excluded. For the purposes of this report, the term "aerospace-grade" refers to a category of high-performance fasteners manufactured to the specifications of aerospace/defense organizations.

Reported markets encompass:

- motor vehicle original equipment manufacturer (OEM)
- machinery OEM
- other OEM such as electrical and electronic equipment, fabricated metal products, and aerospace equipment
- maintenance/repair/operations (MRO)
- construction.

Major world regions include North America, Western Europe, Asia/Pacific, and all other regions. Demand by product and market segment is also forecast for each major world region.

To illustrate historical trends world, product, market, and regional demand (including product and market segments) are provided for 2010 and 2015. Finally, world shipments are segmented by major world region and provided for 2010, 2015, and 2020.

This report quantifies trends in terms of compound annual growth rates (CAGRs), which, by definition, employ in their calculation only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the trend beginning in the base year and ending in the forecast year. Forecasts are developed via the identification and analysis of pertinent statistical relationships and other historical trends

and events, as well as their expected impact over the forecast period. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

Unless otherwise indicated, historical demand and production values are expressed in US dollars at the prevailing rate of exchange with local currencies. Forecasts to 2020, however, assume a fixed 2015 exchange rate.

Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the [Table of Contents](#).

## Sources

*World Industrial Fasteners* (FW70011) is based on [a comprehensive industry study](#) published by The Freedonia Group in November 2016. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources including:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- national, regional, and international non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other industry studies by The Freedonia Group.

Specific sources and additional resources are listed in the [Resources](#) section of this publication for reference and to facilitate further research.

## Industry Codes

The topic of this report is related to the following industry codes:

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industry Codes	
326199	All Other Plastics Product Mfg	3089	Plastics Products, NEC
332722	Bolt, Nut, Screw, Rivet & Washer Mfg	3452	Bolts, Nuts, Screws, Rivets & Washers

## Copyright & Licensing

The full report is protected by copyright laws of the United States of America and international treaties. The entire contents of the publication are copyrighted by The Freedonia Group.

## Table of Contents

Section	Page
About This Report .....	i
Highlights .....	1
World Overview & Forecasts.....	2
Demand by Product.....	2
Chart 1   World Industrial Fastener Demand by Product; 2010, 2015, 2020 (US\$ mil).....	2
Externally Threaded Standard.....	2
Internally Threaded Standard.....	3
Nonthreaded Standard.....	4
Application-Specific Standard.....	5
Aerospace-Grade.....	6
Chart 2   World Industrial Fastener Demand by Product Share; 2010, 2015, 2020 (%) .....	7
Demand by Market .....	8
Chart 3   World Industrial Fastener Demand by Market; 2010, 2015, 2020 (US\$ mil) .....	8
Motor Vehicle OEM.....	8
Machinery OEM.....	9
Other OEM.....	10
Maintenance/Repair/Operations.....	12
Construction.....	12
Chart 4   World Industrial Fastener Demand by Market Share; 2010, 2015, 2020 (%).....	13
Regional Segmentation & Forecasts.....	14
Regional Shipments Overview.....	14
Chart 5   World Industrial Fastener Shipments by Region; 2010, 2015, 2020 (US\$ mil) .....	14
Chart 6   World Industrial Fastener Shipments by Region Share; 2010, 2015, 2020 (%) .....	15
Regional Demand Overview .....	16
Chart 7   World Industrial Fastener Demand by Region; 2010, 2015, 2020 (US\$ mil).....	16
Chart 8   World Industrial Fastener Demand by Region Share; 2010, 2015, 2020 (%) .....	17
North America.....	18
Chart 9   North America: Industrial Fastener Demand by Product; 2010, 2015, 2020 (US\$ mil) .....	18
Chart 10   North America: Industrial Fastener Demand by Market; 2010, 2015, 2020 (US\$ mil) .....	19
Western Europe.....	20
Chart 11   Western Europe: Industrial Fastener Demand by Product; 2010, 2015, 2020 (US\$ mil) .....	20
Chart 12   Western Europe: Industrial Fastener Demand by Market; 2010, 2015, 2020 (US\$ mil) .....	21
Asia/Pacific .....	22
Chart 13   Asia/Pacific: Industrial Fastener Demand by Product; 2010, 2015, 2020 (US\$ mil) .....	22
Chart 14   Asia/Pacific: Industrial Fastener Demand by Market; 2010, 2015, 2020 (US\$ mil).....	23
Other Regions.....	24
Chart 15   Other Regions: Industrial Fastener Demand by Region; 2010, 2015, 2020 (US\$ mil).....	24
Central & South America.....	24
Eastern Europe.....	25
Africa/Mideast.....	25
Chart 16   Other Regions: Industrial Fastener Demand by Product; 2010, 2015, 2020 (US\$ mil).....	26
Industry Structure.....	27
Industry Composition & Characteristics.....	27
Chart 17   World Industrial Fastener Market Share by Supplier, 2015.....	27
Market Share.....	27
Companies Cited .....	32
Resources .....	33

To return here, click on any Freedonia logo or the Table of Contents link in report footers.  
PDF bookmarks are also available for navigation.

## RESOURCES

### The Freedonia Group

<i>3482 Global Industrial Fastener Market</i> , November 2016	<a href="http://www.freedoniagroup.com">www.freedoniagroup.com</a>
Related Industry Studies	
<i>3442 World Bearings</i> , August 2016	<a href="#">see study contents</a>
<i>3413 Industrial Fasteners</i> , May 2016	<a href="#">see study contents</a>
<i>3395 World Agricultural Equipment</i> , April 2016	<a href="#">see study contents</a>
<i>3373 World Machine Tools</i> , January 2016	<a href="#">see study contents</a>
<i>3337 World Mining Equipment</i> , November 2015	<a href="#">see study contents</a>
<i>3299 Construction Outlook in China</i> , July 2015	<a href="#">see study contents</a>
Related Focus Reports	
<i>HVAC Equipment: United States</i>	<a href="#">see report contents</a>
<i>Industrial Fasteners: United States</i>	<a href="#">see report contents</a>
<i>Motor Vehicles: United States</i>	<a href="#">see report contents</a>
<i>World Agricultural Equipment</i>	<a href="#">see report contents</a>
<i>World Bearings</i>	<a href="#">see report contents</a>
<i>World HVAC Equipment</i>	<a href="#">see report contents</a>
<i>World Mining Equipment</i>	<a href="#">see report contents</a>
Freedonia Custom Research	<a href="#">see capabilities</a>

### Trade Publications

<i>American Fastener Journal</i> (USA)	<a href="http://www.fastenerjournal.com">www.fastenerjournal.com</a>
<i>Assembly</i> (USA)	<a href="http://www.assemblymag.com">www.assemblymag.com</a>
<i>Automotive News</i> (USA)	<a href="http://www.autonews.com">www.autonews.com</a>
<i>Design News</i> (USA)	<a href="http://www.designnews.com">www.designnews.com</a>
<i>Fabricating &amp; Metalworking</i> (USA)	<a href="http://www.fabricatingandmetalworking.com">www.fabricatingandmetalworking.com</a>
<i>Fastener &amp; Fixing Magazine</i> (UK)	<a href="http://www.fastenerandfixing.com">www.fastenerandfixing.com</a>
<i>Fastener Technology International</i> (USA)	<a href="http://www.fastenertech.com">www.fastenertech.com</a>
<i>Fastener World</i> (Taiwan)	<a href="http://www.fastener-world.com.tw">www.fastener-world.com.tw</a>
<i>Machine Design</i> (USA)	<a href="http://www.machinedesign.com">www.machinedesign.com</a>
<i>New Equipment Digest</i> (USA)	<a href="http://www.newequipment.com">www.newequipment.com</a>

### Agencies & Associations

Eurostat	<a href="http://ec.europa.eu/eurostat">http://ec.europa.eu/eurostat</a>
Industrial Fastener Institute	<a href="http://www.indfast.org">www.indfast.org</a>
International Monetary Fund	<a href="http://www.imf.org">www.imf.org</a>
Organisation for Economic Co-operation and Development	<a href="http://www.oecd.org">www.oecd.org</a>
United Nations	<a href="http://www.un.org">www.un.org</a>
World Bank	<a href="http://www.worldbank.org">www.worldbank.org</a>

**Environmental Impact.** Please consider the environment before printing this report. Freedonia Focus Report collections feature environmentally friendly products distributed entirely via electronic channels.