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Industrial Fasteners in China

Industry Study with Forecasts for **2010 & 2015**

Study #2187 | June 2007 | \$4900 | 170 pages

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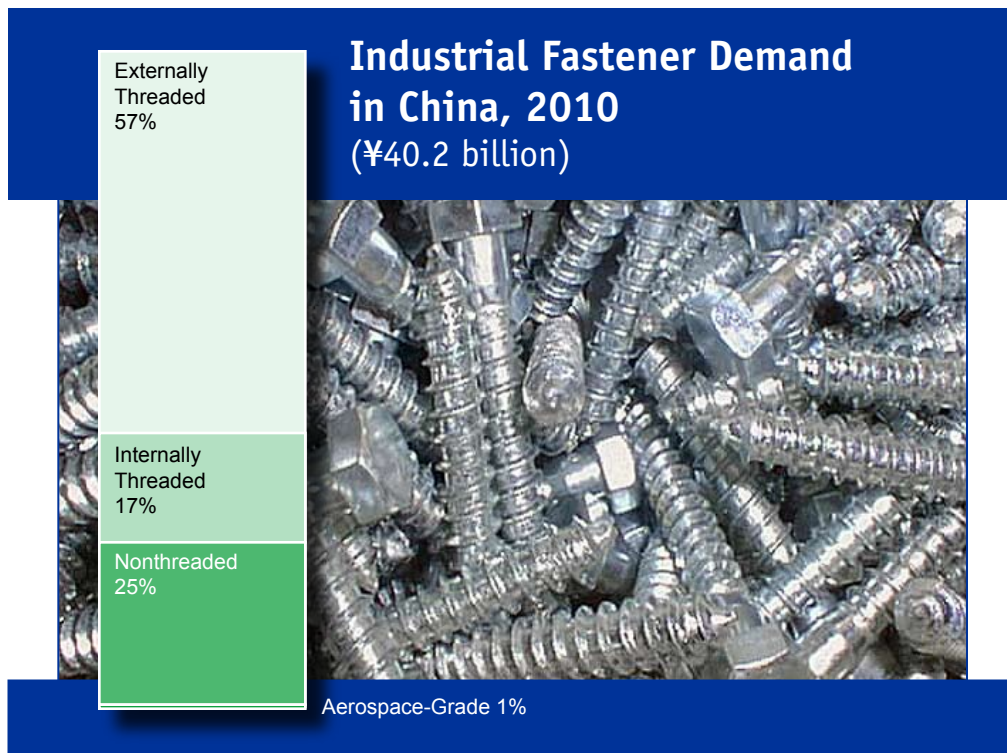
Demand will be driven by rapid growth in the manufacturing of industrial machinery, motor vehicles and electrical/electronic products, and in infrastructure and building construction.

Industrial fastener demand in China to grow 9.4% annually through 2010

Demand for industrial fasteners in China is projected to increase 9.4 percent annually to ¥40 billion in 2010. Gains will be supported by rapid growth in manufacturing production, especially of industrial machinery and motor vehicles. Increasing production of electrical and electronic products will also provide growth opportunities, although these gains will be less pronounced than over the past decade. In addition, industrial fastener demand will be driven by expansion and modernization of China's infrastructure and building construction activities. Functional competition from alternative joining technologies such as adhesives and welding, as well as new materials and manufacturing methods that reduce the number of fasteners required in durable goods production, will restrain further increases.

Standard nonthreaded, aerospace-grade fasteners to be fastest growing

Nonthreaded sales will post the strongest gains among standard fastener types, rising 10.4 percent annually through 2010, stimulated by rapid growth in durable goods production and construction activity, as well as by further technological innovations in nonthreaded fastener design. Externally threaded



fasteners will remain the dominant standard fastener type, accounting for nearly three-fifths of total fastener demand, as these fasteners are less likely to be replaced by alternative joining methods. Aerospace-grade fastener demand will outpace advances for standard fasteners, rising 12.0 percent per year through 2010, spurred by government investment in nonbuilding construction, commercial aircraft, and aerospace and defense applications. Nevertheless, aerospace-grade fasteners will continue to comprise less than one percent of total demand. By way of comparison, demand for aerospace-grade fasteners in the US will constitute nearly 20 percent of total fastener demand in 2010.

Construction market to outpace OEM, MRO uses

Construction demand for fasteners will outpace that of both the OEM and maintenance/repair/operations (MRO) markets. Demand for fasteners in construction applications will increase 10.8 percent annually through 2010, driven by government funding for large-scale infrastructure construction and government efforts to increase private home ownership. However, the OEM market will remain the largest in China, as demand is stimulated by rapid growth in the industrial machinery, motor vehicle, and electrical and electronic product markets.

Sample Text, Table & Chart

PRODUCTS

Externally Threaded

Demand for externally threaded standard fasteners is expected to increase to 10 billion in 2010, decrease from the 2000 level. Externally threaded fasteners benefit from the growing, growth in manufacturing and construction through 2010. In addition, demand for externally threaded fasteners from less intense competition from other fastener types. Externally threaded fasteners may be replaced by joining methods like adhesives and welding because the added cost of producing and installing these fasteners is often warranted in cases where they are removed (for instance, to service equipment or recycle components). However, high strength, high performance imports from foreign producers will continue to account for a sizable share of total externally threaded fastener demand for the foreseeable future. Competition from foreign suppliers leaves domestic suppliers with no room to raise prices, and thus limits the total market in value terms.

Externally threaded fasteners, which accounted for nearly 60 percent of all standard fastener demand in 2005, are so called because the fastening mechanism (thread) is on the outer part of the device. Bolts are by far the most widely used type of externally threaded standard fastener, representing 84 percent of the total market. A bolt is headed at one end and threaded at the other and is typically mated to a nut through a nonthreaded clearance hole, with the nut generally rotating during assembly while the bolt is held stationary.

Screws, like bolts, are headed at one end and threaded at the other. However, in screw-based assemblies, the screw is usually rotated, engaging a preformed internal thread in one or more of the joint parts or force-cutting its own mating thread. While many screws have full threading

**SAMPLE
TEXT**

TABLE III-6

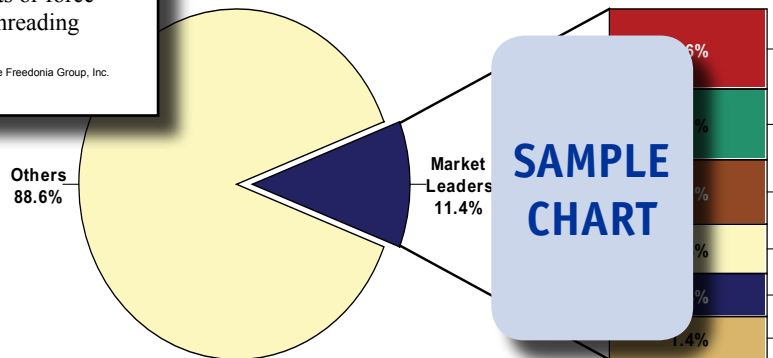
AEROSPACE-GRADE FASTENER SUPPLY & DEMAND IN CHINA (million yuan)

Item	1995	2000	2005	2010	2015
Industrial Fastener Demand	7085	9995	25635	40220	56350
% aerospace-grade	0.6	0.6	0.5	0.5	0.6
Aerospace-Grade Fastener Demand					
By Type:					
Externally Threaded					
Internally Threaded					
Nonthreaded					
By Application:					
Aerospace/Defense					
Other					
- net imports					
Aerospace-Grade Fastener Shipments					

**SAMPLE
TABLE**

CHART V-1

INDUSTRIAL FASTENER MARKET SHARE IN CHINA BY COMPANY, 2005 (¥25.6 billion)



**SAMPLE
CHART**

Sample Profile, Table & Forecast

COMPANY PROFILES

Gem-Year Industrial Company Limited

Number Eight, Gem-Year Road
 Jiashan Economic Development Zone, Jiashan
 Zhejiang
 China
 86-573-4
 www.ge

**SAMPLE
PROFILE**

Annual S... as reported by
 company
 Employr

Key Products: ... and rods

International Contact: Mr. Jinzhang Cai, General Manager

Gem-Year is a leading worldwide producer of industrial fasteners. The company's products are sold throughout the Asia/Pacific region, Europe and the Americas. In January 2007, Gem-Year launched an initial public offering of its stock on the Shanghai Stock Exchange.

The Company is active in the Chinese fastener industry through the manufacture and sale of GEM-YEAR and CYI bolts, screws, nuts, washers, pins and rods. Bolts comprise hexagonal, carriage, welding, double-end thrust, knurled, rack and high-torque types; while Gem-Year's screws include hexagonal, tapping, dry-wall, countersunk-head, machine, slot, hex-flange, high-torque, trap and self-drilling varieties. Nuts made by the Company consist of two-headed and hexagonal models, as well as rivet, exploding and specialty types. Washers include flat and spring types. Gem-Year's split and thread rods are used in a wide range of industrial joining applications. The Company also produces drawn wire that is sold to other fastener manufacturers.

TABLE IV-8

ELECTRICAL & ELECTRONIC PRODUCT FASTENER DEMAND IN CHINA BY MARKET (million yuan)

Item	1995	2000	2005	2010	2015
Electrical/Electronic Production (bil ¥)	500	700	1000	1500	2000
¥ fastener/000¥ production	0.4	0.5	0.6	0.7	0.8
Electrical/Electronic Fastener Demand	200	300	400	500	600
Communication, Computer & Other	50	75	100	125	150
Electronic Components	50	75	100	125	150
Household Appliances	50	75	100	125	150
Electrical Industrial Apparatus	70	105	140	175	210
Instruments & Office Equipment	10	15	20	25	30
Lighting & Wiring Equipment	40	60	80	100	120
Other	70	105	140	175	210
% electrical/electronic products	0.7	0.8	0.9	1.0	1.1
OEM Industrial Fastener Demand	4900	7290	10500	15000	20000

**SAMPLE
TABLE**

"Fastener Demand -- Electrical and electronic product OEM demand for industrial fasteners is forecast to climb 9.8 percent annually to ¥4.0 billion in 2010, slightly outpacing overall OEM fastener demand. Fastener suppliers will benefit from healthy, albeit slowing, increases in electrical and electronic product industry output. On the other hand, fastener demand will be restrained by ..."

--Section IV, pg. 76

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OTHER STUDIES

World Elevators

World elevator and escalator demand will rise 5.1% yearly through 2011. Gains will be driven by the ongoing migration to cities in developing regions, and by mandated retrofit services and nonresidential construction in developed markets. Escalators and moving walkways will outpace elevators. This study analyzes the \$44.5 billion world elevator and escalator industry, with forecasts for 2011 and 2014 by type, market, world region and for 15 countries. It also details market share and profiles major players.
 #2248 09/2007..... \$5500

Elevators in China

Elevator/escalator product and service demand in China will grow 9.7% yearly through 2011. Gains will be driven by strong new construction spending (especially on multifamily buildings) and on nonresidential establishments. New product installations will remain dominant over the elevator service segment. This study analyzes the ¥39 billion Chinese elevator/escalator industry, with forecasts for 2011 and 2016 by type, market and region. It also evaluates market share and profiles industry participants.
 #2216 07/2007..... \$4900

Bearings

Ball, roller and plain bearing demand in the US will reach \$10.4 billion in 2011. Growth will be driven by largely favorable market conditions and by a shift toward more expensive, better performing products. Unmounted plain bearings will grow the fastest while aerospace, automotive and engine/turbine manufacturing will lead gains by market. This study analyzes the US bearing industry, with forecasts for 2011 and 2016 presented by product and market. It also details company market share and profiles major players.
 #2207 07/2007..... \$4500

Industrial Fasteners

US demand for industrial fasteners will reach \$12.9 billion in 2011, driven by healthy growth in aerospace equipment and nonresidential construction, a rebound in motor vehicles and rising production of many durable goods. Aerospace-grade fasteners will grow four times as fast as standard types. The MRO segment will be the fastest growing market. This study analyzes the US industrial fastener industry to 2011 and 2016 by product and market. It also evaluates market share and profiles leading producers.
 #2173 04/2007..... \$4400

Gaskets & Seals

US demand for gaskets and seals will grow 3.6% annually through 2010. Gains will be supported by an improved economic outlook and increasing penetration of more advanced materials. Molded seals and packings, plastic gaskets, expanded graphite gaskets and metallic gaskets will grow the fastest. Aerospace will see the most rapid gains by market. This study analyzes the \$7.3 billion US gasket and seal industry to 2010 and 2015 by product and market. It also evaluates market share and profiles major firms.
 #2150 02/2007..... \$4300

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