World Industrial Fasteners

Industry Study with Forecasts for **2012 & 2017**

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The Freedonia Group

767 Beta Drive

Cleveland, OH • 44143-2326 • USA

Toll Free US Tel: 800.927.5900 or +1 440.684.9600

Fax: +1 440.646.0484

E-mail: info@freedoniagroup.com

www.freedoniagroup.com

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Industry Study with Forecasts for *2012 & 2017*

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INDUSTRY STRUCTURE

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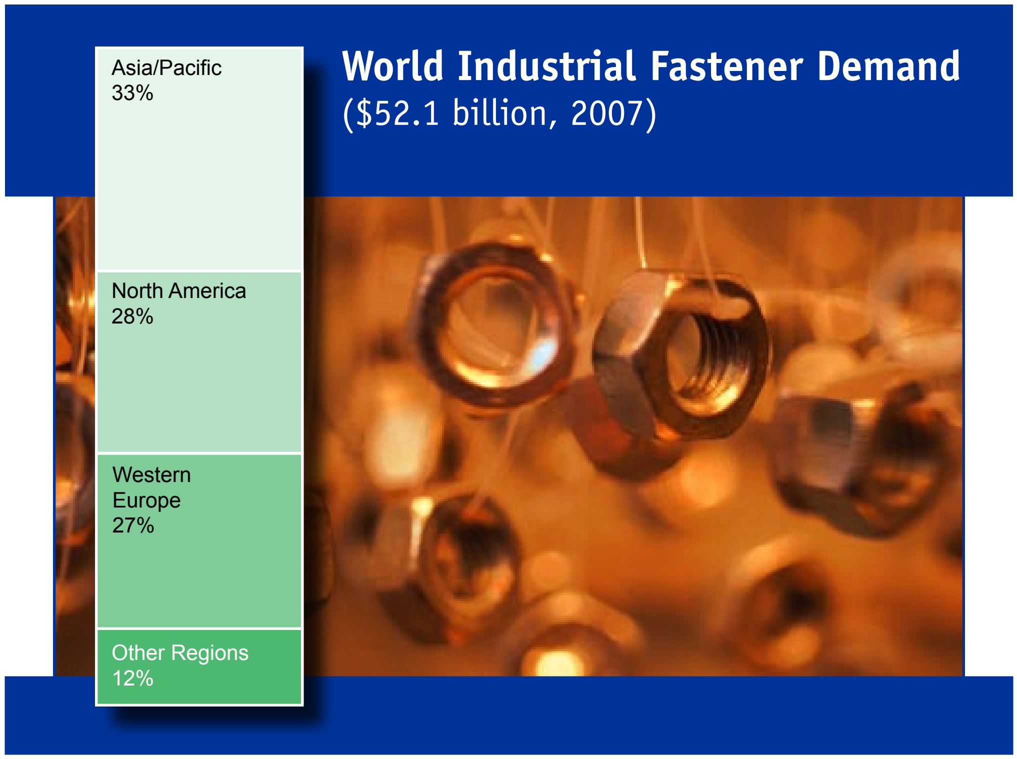
Fastener demand will be driven by increases in world economic output, fixed investment activity, manufacturing production, and aerospace equipment and motor vehicle output.

Global demand to rise 4.8% yearly through 2012

Global demand for industrial fasteners is projected to increase 4.8 percent annually to $66 billion in 2012. Fastener demand will be driven by increases in world economic output, fixed investment activity, manufacturing production, and aerospace equipment and motor vehicle output. However, the use of new materials and production methods that reduce the number of fasteners required in motor vehicles and some aircraft will limit future market gains.



Emergent economies to outpace mature markets

Market advances in the world's emergent economies will considerably outpace demand gains in the world's more advanced, mature ones. Thus, industrial fastener demand growth in Asia, the Africa/Mideast region, Eastern Europe and Latin America will easily exceed growth in the US, Western Europe and Japan. China will register the largest gains of any national market as the country continues its development as an economic power and as its manufacturing and fixed investment activity continue to climb. In 2008, China will surpass Japan to become the second largest fastener market in the world, after the US.

Although the rate of increase in industrial fastener demand will be less than in developing nations or regions, demand in the US, Western Europe and Japan will still grow considerably. Sales growth will be spurred by generally favorable economic conditions, continued fixed investment growth and higher income levels. These areas will remain the most intensive users of industrial fastening products, reflecting the advanced industrial and technological base of their economies.

Aerospace-grade fasteners to outpace standard types

Demand growth for aerospace-grade fasteners exceeded that for standard fasteners between 2002 and 2007. Robust activity in the commercial and military aircraft industries during this period contributed greatly to this trend. However, as demand for high-integrity fasteners levels off, standard fasteners will again emerge as the fastest growing product group, in line with historical norms. The motor vehicle industry will remain the largest consuming sector for industrial fasteners, accounting for about one-third of total fastener demand through 2012. However, electrical and electronic equipment will be the fastest growing market. Fastener suppliers will benefit from increases in the global output of items such as digital cameras and multifunction wireless communication devices. Demand for fasteners used in industrial machinery and fabricated metal products will also increase at above-average rates.

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Sample Text, Table & Chart

TABLE VI-12

TAIWAN INDUSTRIAL FASTENER DEMAND BY PRODUCT & MARKET (million US dollars)

Item	1997	2002	2007	2012	2017
Industrial Fastener Demand					
By Product:					
Standard					
Externally Threaded					
Internally Threaded					
Nonthreaded					
Application-Specific					
Aerospace-Grade					
By Market:					
Original Equipment Manufacturing					
Motor Vehicles					
Electrical & Electronic Equipmen					
Industrial Machinery					
Fabricated Metal Products					
Other OEM					
Aerospace					
All Other					
MRO & Other	50				

SAMPLE TABLE

ASIA/PACIFIC

Taiwan: Supply & Demand

Taiwan is the fifth largest producer of industrial faste world behind the US, Japan, China and Germany. With shi US$3.3 billion in 2007, Taiwan makes its biggest mark as export leader. In 2007, Taiwan ran a foreign trade surplus fasteners equivalent to nearly four times its consumption. customers throughout the world, the Taiwanese fastener in leveraged low labor and materials costs -- advantages mag significant economies of scale -- into a formidable export- in the world fastener industry. The country's fastener ship an 11.4 percent annual pace from 2002 to 2007, above bot global averages.

Demand for industrial fasteners in Taiwan totaled US lion in 2007. Fastener consumption in Taiwan, though dw domestic industry's output, is at a comparatively high inte (relative to such measures as gross fixed investment and m value-added) by regional standards, reflecting the presence electronics, industrial machinery and motor vehicle industries, as well as the existence of subst truction-related fastener demand. Taiwanese 5.2 percent annual rate from 2002 to 2007, f e Asia/Pacific region overall.

SAMPLE TEXT

Shipments of in ties in Taiwan are projected to increase 2. gh 2012 to US$ lion. Despite Taiwan's efforts to push its fastener product mix t higher-end fasteners, its net foreign trade surplus as a percentag production will begin to decline slowly as the result of growth i production from even lower cost producing countries, such as I and Malaysia. This effect will be the result, in part, of local co investing in manufacturing plants in countries where costs are e

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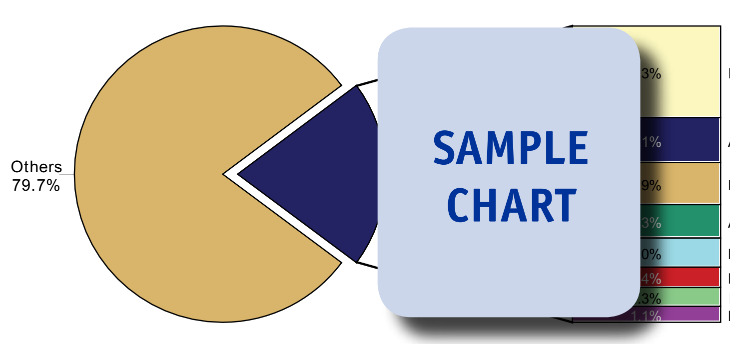
CHART VIII-1

WORLD INDUSTRIAL FASTENER MARKET SHARE BY COMPANY, 2007 ($52.1 billion)



SAMPLE CHART

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Sample Profile, Table & Forecast

TABLE VI-11

TAIWAN INDUSTRIAL FASTENER SUPPLY & DEMAND
(million US dollars)

Item	1997	2002	2007	2012	2017
Gross Domestic Product (bil 2006 US$)	4				10
% fixed investment	2				.9
Gross Fixed Investment (bil 2006 US$)					01
$ fasteners/000$ GFI	2				47
Mfg Value-Added (bil 2006 US$)					33
$ fasteners/000$ MVA	3				58
Industrial Fastener Demand					00
net exports	12				50
Industrial Fastener Shipments	1560	1950	3340	3800	4550

SAMPLE TABLE

COMPANY PROFILES

Gem-Year Industrial Company Limited
Number Eight, Gem-Year Road, EDZ Jiashan
Zhejiang
China
86-573-4
http://ww

Sales: $
Employm

Key Prod

SAMPLE PROFILE

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 involved in the global industrial fastener market through the production of GEM-YEAR and CYI fasteners. Among Gem-Year's products are hex-head and carriage bolts; hex, hex socket countersunk head, self-drilling, dry wall, tapping and hex lag screws; and threaded rods. These fasteners can be used in the production of automobiles, bicycles, electronic power equipment, furniture, household appliances, motorcycles and steel structures.

Gem-Year maintains a manufacturing site in Jiashan, Zhejiang, China that encompasses 170,000 square meters of production space. The facility can produce up to 200,000 metric tons of fasteners per year. In addition, Gem-Year maintains a warehouse at the Jiashan site that has the capacity to store up to 100,000 metric tons of goods. In China, Gem-Year maintains 33 sales offices. The Company also markets its products through a global sales network with locations throughout the

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"Industrial fastener demand in Taiwan is forecast to expand 5.9 percent annually through 2012 to US$1.0 billion, rising faster than shipments but moderating considerably from the 2002-2007 period. Market advances will be driven by increases in both capital spending and manufacturing output. Further growth in the country's large electronics industry is also expected to contribute to future fastener sales gains. These trends will be bolstered by ..."
--Section VI, pg. 189

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Other Studies

Gasket & Seals

This study analyzes the US gasket and seal industry. It presents historical demand data (1997, 2002 and 2007) and forecasts for 2012 and 2017 by product (e.g., o-rings, flexible seals and packings, diaphragm seals, body seals, rotary oil seals, axial and mechanical face seals, compression packings), and by market (e.g., motor vehicles, industrial machinery, electrical and electronic products). The study also considers market environment factors, details industry structure, evaluates company market share and profiles major players.

#2416 .... 11/2008..................... $4700

Builders' Hardware

US builders' hardware demand will rise to $11 billion in 2012, driven by a recovery in housing. Locks and other safety devices will remain the largest segment and grow the fastest, especially electromechanical types. Furniture will continue as the largest application while safety and protection products and cabinets lead gains. This study analyzes the US builders' hardware industry, with forecasts for 2012 and 2017 by material, product, application, market and region. It also evaluates market share and profiles industry players.

#2379 .... 09/2008..................... $4600

Industrial Rubber Products

US demand for industrial rubber products will reach $18.6 billion in 2012, buoyed by accelerating motor vehicle production and strong growth in the aerospace industry. Mechanical rubber goods will remain the largest segment, while other miscellaneous industrial products such as geomembranes will grow the fastest. This study analyzes the US industrial rubber product industry, with forecasts for 2012 and 2017 by product and market. It also evaluates company market share and profiles leading competitors.

#2361 .... 05/2008..................... $4600

Automotive Coatings, Adhesives & Sealants

US demand for automotive coatings, adhesives and sealants will reach $5.3 billion in 2012. Slow gains in the dominant coatings segment will offset faster growth in adhesives and sealants. Design trends will favor adhesives over mechanical fasteners and liquid over mechanical gaskets. This study analyzes the $4.6 billion US automotive coating, adhesive and sealant industry, with forecasts for 2012 and 2017 by product, application and market. It also evaluates market share and profiles industry competitors

#2317 .... 05/2008..................... $4500

Industrial Fasteners in China

Demand in China for industrial fasteners will grow 9.4% annually through 2010. Nonthreaded sales will lead gains among standard types, with externally threaded fasteners remaining dominant. Aerospace-grade fasteners will outpace standard products. Construction will be the fastest growing market. This study analyzes the ¥25.6 billion Chinese industrial fasteners industry, with forecasts for 2010 and 2015 given by type and market. This study also evaluates company market share and profiles major players.

#2187 .... 06/2007..................... $4900

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