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# World Industrial Fasteners

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Industry Study with Forecasts for **2014 & 2019**

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Study #2654 | September 2010 | \$6100 | 401 pages

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*Global motor vehicle output is expected to make a strong recovery from the declines registered during the 2004-2009 period, bolstering associated industrial fastener sales worldwide.*

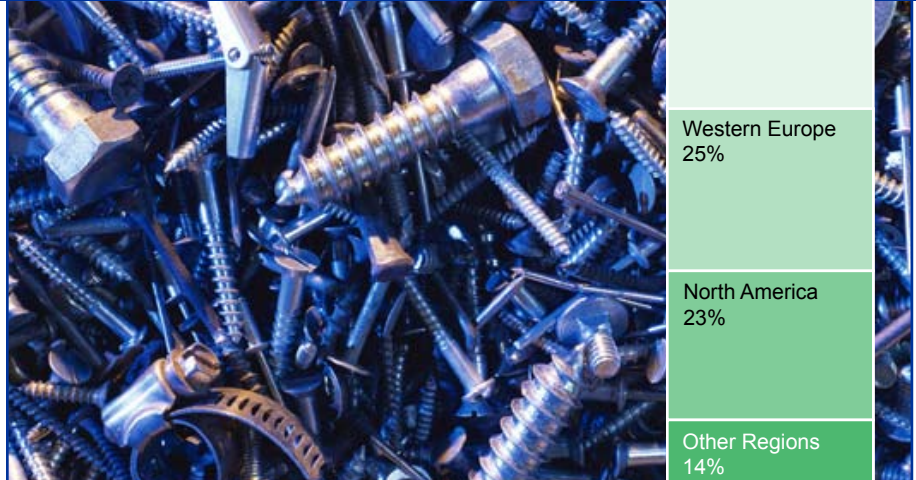
## Global demand to expand 8.5% annually to 2014

World demand for industrial fasteners is forecast to expand 8.5 percent per year to \$80.5 billion in 2014. Fastener producers will benefit as countries around the world recover from the global recession of 2009. Global motor vehicle output is expected to make a strong recovery from the declines registered during the 2004-2009 period, bolstering associated fastener sales. In addition, world fixed investment levels will continue to rise, and the global durable goods manufacturing environment will improve, both of which will support increased fastener demand. However, fastener sales gains will be restrained in some markets by the use of alternative joining technologies (such as adhesives) or production methods that utilize fewer fasteners.

## Asia/Pacific region to post strongest sales gains

The Asia/Pacific region will post the strongest sales increases through 2014, led by healthy 12.8 percent yearly demand gains in China. Advances will be supported by the country's ongoing industrialization and growing manufacturing output. China surpassed Japan to become the world's largest producer of motor vehicles in 2009, which will provide industrial fastener manufacturers with important new sales opportunities as industry output continues to climb. China is expected to account for one-quarter of all additional global fastener demand through 2014, and by 2019 the

## World Industrial Fasteners Demand (\$53.6 billion, 2009)



country is forecast to have a fastener market larger than Japan and the US combined.

Chinese fastener output is forecast to grow even faster than product demand in the nation. While US-based manufacturers made more fasteners in value terms in 2009, Chinese suppliers will easily surpass them by 2014, and the country will become the world's leading producer. Foreign companies will continue to establish manufacturing facilities in China to take advantage of lower production costs, and domestic firms such as Gem-Year Industrial will continue to grow. Firms in developed areas like the US, Japan and Western Europe will still lead the world in production of more advanced, highly-engineered

fasteners. However, Chinese firms are narrowing the technological gap as their access to capital grows and they gain more manufacturing experience.

Historically, advances in industrial fastener demand in the developed areas of the US, Western Europe and Japan have been much slower than in the developing world. However, this will not be the case in all areas through 2014, as fastener sales in many developed countries bounce back following the slump in durables manufacturing that hit in 2008 and 2009. Growth in these areas will be supported largely by solid recoveries in motor vehicle manufacturing and accelerating growth in durable goods manufacturing output.

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## Sample Text, Table & Chart

### ASIA/PACIFIC

#### China: Outlook & Suppliers

Shipments of industrial fasteners from manufacturers in the Asia/Pacific region are forecast to increase to \$15.4 billion in 2014, up from \$12.5 billion in 2009. China will continue to be the largest market for industrial fasteners in the world, with a forecast to become the largest market by 2014. Fastener production in China is expected to be supported by strong market conditions and a growing number of export markets. Further investments in China are expected to be supported by firms. For example, in May 2010 Taiwan's Chun Yu Group signed an agreement to open a factory in Anshan, Liaoning with an annual capacity of 100,000 tons of fastener and spheroidized annealing wire. This investment will also be bolstered by production improvements (in quality, technology, and capacity) made by domestic suppliers. On the other hand, shipment increases will be restrained through 2014 by anti-dumping tariffs imposed by the European Union on certain fasteners in China. The effect of these levies will be partially mitigated by anti-dumping duties placed on some steel fasteners originating in the EU by the Chinese Ministry of Commerce in June 2010, which will be effective for five years.

China's fastener trade surplus is expected to increase rapidly through 2014, as domestic demand growth slows to some degree and the country's fastener manufacturing capacity continues to expand, reducing its reliance on imports. China is expected to be the second largest net exporter in the world, behind only Taiwan, by 2014. The country's trade surplus is forecast to be the equivalent of nearly 14 percent of its industrial fastener production.

Demand for industrial fasteners in China is forecast to increase at a rate of 10 percent per year to \$15.4 billion in 2014, surpassing the US market and becoming the world's largest fastener market. Sales increases will be tempered by anti-dumping duties placed on some steel fasteners originating in the EU by the Chinese Ministry of Commerce in June 2010, which will be effective for five years.

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TABLE VI-3

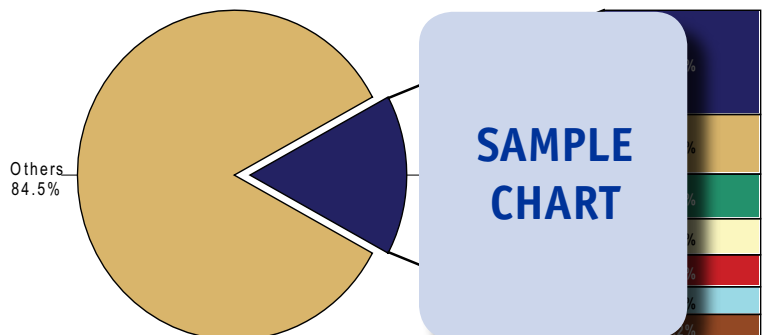
CHINA: INDUSTRIAL FASTENER SUPPLY & DEMAND  
(million dollars)

Item	1999	2004	2009	2014	2019
Gross Domestic Product (bil 2008\$)	2,000	2,500	2,700	3,000	3,500
% fixed investment	36	36	36	36	36
Gross Fixed Investment (bil 2008\$)	720	900	978	1,080	1,260
\$ fasteners/000\$ GFI	100	100	100	100	100
Manufacturing Value Added (bil 2008\$)	1,000	1,200	1,300	1,400	1,600
\$ fasteners/000\$ MVA	100	100	100	100	100
Motor Vehicle Production (000 units)	1,000	1,200	1,300	1,400	1,600
Light Vehicles	1,000	1,200	1,300	1,400	1,600
Medium & Heavy Trucks & Buses	0	0	0	0	0
Industrial Fastener Demand	100	100	100	100	100
net exports	0	0	0	0	0
Industrial Fastener Shipments	100	100	100	100	100
% China	6	6	6	6	6
Asia/Pacific Industrial Fastener Shpts 10	100	100	100	100	100

SAMPLE  
TABLE

CHART VIII-1

WORLD INDUSTRIAL FASTENER MARKET SHARE BY COMPANY  
(\$53.6 billion, 2009)



SAMPLE  
CHART

## Sample Profile, Table & Forecast

### COMPANY PROFILES

#### Changshu Standard Parts Factory

No. 88 Xin'anjiang Road  
 Dongnan Development Zone  
 Changshu, Jiangsu 215500  
 China  
 86-512-5281-  
 http://www.cl

Annual Sales  
 Employment

Key Products washer assem-  
 blies and spec

Changshu Standard Parts produces and markets automotive and industrial fasteners for customers in the Asia/Pacific region, North America, Europe, Central and South America, Africa, and the Middle East. The Company is privately held.

The Company is active in the world industrial fastener market through the manufacture and sale of bolts, screws, nuts, studs, threaded rods and specialty fasteners for automotive and industrial applications. These fasteners are marketed under the DALI brand name and are made using stainless steel and alloy steel. Changshu Standard Parts also makes plastic inserts for use with its fasteners. Changshu Standard Parts' bolts are available in hex head, hex flange, cup head, square neck, cap head, nibbed and nonstandard types. The Company produces screws in machine, hex head, socket cap head, tapping, self-drilling tapping, chipboard and nonstandard varieties; and nuts are made in hexagonal and connecting styles. The DALI product line also includes high-strength hex head bolts, standard and socket hex head screws, and bolt, nut and washer assemblies. These products are engineered for

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**SAMPLE  
PROFILE**

TABLE VI-4

### CHINA: INDUSTRIAL FASTENER DEMAND BY PRODUCT & MARKET (million dollars)

Item	1999	2004	2009	2014	2019
Asia/Pacific Industrial Fastener Demand					900
% China					26
China Industrial Fastener Demand					900
By Product:					
Standard					900
Externally Threaded					900
Internally Threaded					75
Nonthreaded					15
Application-Specific					30
Aerospace-Grade					900
By Market:					
Original Equipment Manufacturing					900
Motor Vehicles					900
Machinery					900
Electrical/Electronic Equipment					70
Fabricated Metal Products					15
Aerospace					15
All Other					900
MRO & Construction					200

**SAMPLE  
TABLE**

"... regional output of fastener-containing equipment such as motor vehicles and machinery has been rapidly increasing in recent years, as has construction activity, which has led to nearly double-digit growth in fastener demand in the region since 1999. China surpassed Japan to become the region's largest fastener consuming nation in 2009, and accounted for over 40 percent of regional demand in that year."

--Section VI, pg. 172





**OTHER STUDIES**

**Abrasives**

Demand for abrasives in the US is forecast to rise 4% annually through 2014. Durable goods manufacturing will remain the dominant market, with the motor vehicle segment growing the fastest. Nonmetallic coated and bonded abrasives and loose grains and powders will outperform metallic abrasives. This study analyzes the \$4.7 billion US abrasives industry, with forecasts for 2014 and 2019 by raw material, product and market. It also evaluates company market share and profiles industry players.

#2696 ..... October 2010 ..... \$4800

**World Bearings**

Global bearing demand will increase 8.5% annually through 2014. Unmounted bearings will continue to account for the majority of sales. The Asia/Pacific region will post the strongest gains, led by China. The motor vehicle and machinery markets will remain the largest sources of demand. This study analyzes the \$50.5 billion world bearing industry, with forecasts for 2014 and 2019 by product, market, world region and for 30 countries. It also evaluates company market share and profiles industry participants.

#2649 ..... June 2010 ..... \$6100

**World Gears**

Global gear demand will climb 4.7% yearly through 2013, driven in part by a shift toward more expensive, energy-efficient units. China and India will register some of the strongest market advances, with China expected to claim one-third of all new demand and pass Japan as the second largest market behind the US. This study analyzes the \$135 billion world gear industry, with forecasts for 2013 and 2018 by product, market, world region and for 21 countries. It also evaluates company market share and profiles industry participants.

#2624 ..... April 2010 ..... \$5800

**Gears**

US demand for gears and gear assemblies will rise 3.9% annually through 2013. Gains will be supported by rebounding levels of motor vehicle production, and by value gains from product improvements and upgrades such as transmissions with higher numbers of speeds. Vehicular gear assemblies will register the strongest growth. This study analyzes the \$25 billion US gears industry, with forecasts for 2013 and 2018 by gear material, product and market. It also evaluates company market share and profiles industry players.

#2593 ..... January 2010 ..... \$4700

**Industrial Fasteners in China**

Demand for industrial fasteners in China will rise 10.7% yearly through 2013, driven mainly by rapid growth in the production of industrial machinery and motor vehicles. Externally threaded fasteners will remain dominant and lead gains among standard types, while aerospace-grade fasteners grow the fastest overall from a small base. This study analyzes the 44.7 billion yuan industrial fastener industry in China, with forecasts for 2013 and 2018 by product and market. It also details market share and profiles industry participants.

#2531 ..... September 2009 ..... \$5200

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