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World Industrial Fasteners

Industry Study with Forecasts for **2016 & 2021**

Study #2915 | September 2012 | \$6300 | 482 pages

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Accelerating motor vehicle production, manufacturing output and fixed investment spending will lead to increased demand for fasteners used in motor vehicles and machinery.

World sales to climb 5.2% annually through 2016

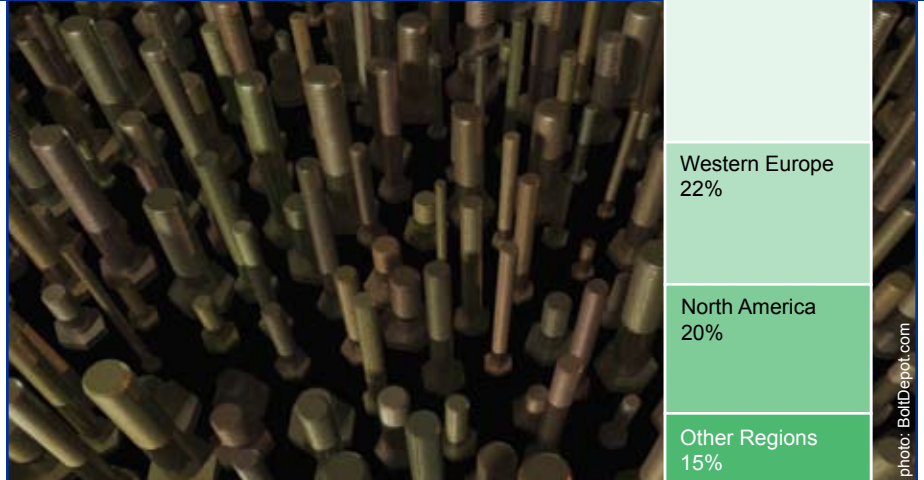
Global sales of industrial fasteners are expected to climb 5.2 percent per year to \$82.9 billion in 2016, accelerating from the 2006-2011 rate of expansion. The economies of many countries around the world will continue to recover from the global recession of 2009, spurring growth in durable goods output, which largely determines worldwide fastener sales.

Motor vehicle production is expected to expand at a faster rate, stimulated by sales-led output rebounds in a number of developed nations, which will bolster associated fastener sales. In 2011, motor vehicle original equipment manufacturing was the largest market for industrial fasteners, and this market will post the largest gains through 2016 in value terms. Also, accelerations in manufacturing output and fixed investment spending will lead to increased demand for fasteners used in machinery. However, intensifying competition from alternative joining technologies (such as adhesives) will restrain fastener sales increases in some market segments.

Asia/Pacific region to see fastest demand gains

The Asia/Pacific region will record the fastest demand gains from 2011 to 2016, averaging 7.4 percent per year. This

World Industrial Fastener Demand (\$82.9 billion, 2016)



expansion will be driven primarily by the strong Chinese market, which will continue to advance at a rapid pace despite moderating from the 2006-2011 rate. Rising demand in the smaller Indian market will complement these gains, as sales in this country will climb at the most rapid pace worldwide through 2016. Ongoing growth in the durable goods manufacturing sectors in these nations, along with the continuing need for new and improved components of infrastructure, will stimulate large gains in industrial fastener demand. Sales of fasteners in other developing areas of the world will generally advance at a healthy pace.

Increases in industrial fastener demand in the world's highly developed economies -- namely, the US, Western Europe, and Japan -- were much slower than in industrializing countries between 2006 and 2011, and sales gains in most developed nations will continue to be subpar through 2016. Because the durable goods manufacturing sectors in these areas are mature, there will be fewer growth opportunities for fastener suppliers. However, recoveries in motor vehicle production and construction expenditures following a period of decline will result in faster fastener market advances going forward.

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Sample Text, Table & Chart

ASIA/PACIFIC

India: Industrial Fastener Outlook & Suppliers

Demand for industrial fasteners in India is forecast to exceed \$2 billion in 2016, representing the fastest growing market in the world. An acceleration in demand will drive increases in sales of industrial fasteners in all segments, with machinery and electrical equipment expected to record the fastest sales gains. Growth will moderate through 2016, boosting associated automotive manufacturing output growth. The 2006-2011 pace, causing sales of these vehicles to moderate as well.

Shipments from facilities in India are forecast to increase annually through 2016 to \$2.4 billion, above the regional average but trailing demand growth. Manufacturing will continue to benefit from strong domestic market conditions and expansion in important regional export markets. Additionally, foreign capital will support production advances as multinationals invest in new Indian fastener manufacturing facilities or existing plants. However, rising competition within the region and low-cost producers based in other developing nations will constrain shipment gains, and the size of India's trade deficit in fasteners will increase.

The majority of the country's fastener production comes from small- to medium-sized domestic firms, which include ANK, Lakshmi Precision Screws, Precision Auto Engineers, Sterling Sundram Fasteners (TV Sundram Iyengar & Sons), and Viraj. A. Raymond (France); NIFCO (Japan); and Maclean-Fogg, Black & Decker, and TRW Automotive (US) are among the multinationals operating fastener factories in the nation.

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TABLE VI-10

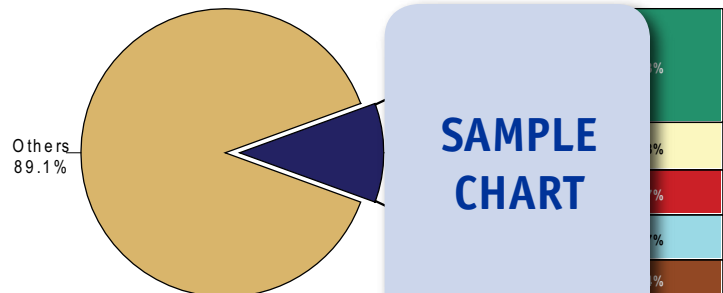
INDIA: INDUSTRIAL FASTENER DEMAND BY PRODUCT & MARKET (million dollars)

Item	2001	2006	2011	2016	2021
Asia/Pacific Industrial Fastener Demand % India					
India Industrial Fastener Demand					
By Product:					
Standard					
Externally Threaded					
Internally Threaded					
Nonthreaded					
Application-Specific					
Aerospace-Grade					
By Market:					
Original Equipment Manufacturing					
Motor Vehicles					
Machinery					
Electrical/Electronic Equip					
Fabricated Metal Products					
Aerospace Equipment					
Other OEM					
Maintenance/Repair/Operations					
Construction					

SAMPLE
TABLE

CHART VIII-1

WORLD INDUSTRIAL FASTENER MARKET SHARE, 2011 (\$64.4 billion)

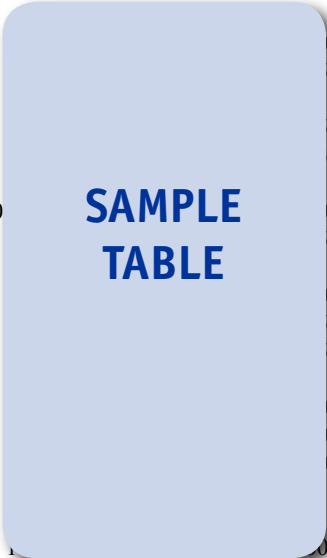


SAMPLE
CHART

Sample Profile, Table & Forecast

TABLE VI-9
INDIA: INDUSTRIAL FASTENER SUPPLY & DEMAND
(million dollars)

Item	2001	2006	2011	2016	2021
Gross Domestic Product (bil 2010\$)					
% fixed investment					
Gross Fixed Investment (bil 2010\$)					
\$ fasteners/000\$ fixed investment					
Manufacturing Value Added (bil 2010\$)					
\$ fasteners/000\$ MVA					
Motor Vehicle Production (000 units)					
Light Vehicles					
Medium & Heavy Trucks & Buses					
Industrial Fastener Demand					
net exports					
Industrial Fastener Shipments					
% India					
Asia/Pacific Industrial Fastener Shpmts					



COMPANY PROFILES

Tong Hwei Enterprise Company Limited
 No. 399 Gang Yan Road
 Gang Shan 820
 Kaohsiung
 Taiwan
 886-7-62
 http://ww

SAMPLE PROFILE

Annual S
 Employ

Key Pro ed rods, and nuts

Tong Hwei Enterprise makes a variety of high-end stainless steel fasteners, including bolts and screws. The privately held company's operations include production centers in Taiwan (2), Malaysia, and China. Additionally, the Company operates through associations with other Tong Group facilities.

The Company's stainless steel fasteners include screws, bolts, threaded rods, and nuts marketed under the THE brand name. Tong Hwei Enterprise manufactures screws in hex head cap, hex head lag, hex socket head cap, and machine types. Bolts are produced by the Company in such types as hex and round head square carriage. Tong Hwei Enterprise's stainless steel rods are manufactured in a range of diameters and lengths. Additional fastener products offered by the Company include specialty fastener products and stainless steel nuts for use with bolts, screws, and threaded rods. Tong Hwei Enterprise's fasteners are offered in standard and metric sizes, and intended mainly for industrial and construction applications.

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"Shipments of industrial fasteners from facilities in India were \$1.5 billion in 2011, accounting for five percent of all product output in the Asia/Pacific region. Most of the fastener products made in Indian facilities are lower-end commodity-type items. From 2006 to 2011, shipments of fasteners increased 9.7 percent per year, with local producers benefiting from considerable growth in domestic demand and the development of export markets, particularly those in other countries in the Asia/Pacific region. However, ..."
 --Section VI, pg. 187

OTHER STUDIES

World Bearings

Global demand for bearings will rise 7.8 percent yearly to \$96 billion in 2016. The Asia/Pacific region will post the fastest gains and account for more than half of the world total. Unmounted ball bearings will remain the best selling type, followed closely by unmounted roller bearings, which will experience the fastest sales gains This study analyzes the \$65.9 billion world bearings industry, with forecasts for 2016 and 2021 by product, market, world region and for 30 countries. The study also evaluates company market shares and profiles industry players.

#2903 July 2012 \$6300

Packaging Machinery in China

Demand for packaging machinery in China will increase 7.5 percent annually to 40 billion yuan in 2016. Filling and form/fill/seal equipment will remain the largest segment, while labeling and coding equipment will continue as the fastest growing. The medical, pharmaceutical and personal care market will lead gains. This study analyzes the 27.8 billion yuan packaging machinery industry in China, with forecasts for 2016 and 2021 by product, market and geographic region. The study also evaluates company market share and profiles industry participants.

#2918 July 2012 \$5400

Gaskets & Seals

US demand for gaskets and seals is forecast to increase 4.6 percent per annum to \$9.6 billion in 2016. Compression packings, body seals and expanded graphite gaskets will register the strongest growth. The growing use of better-performing, higher-priced gaskets and seals will help drive value gains. The marine and rail segment will post the fastest market advances. This study analyzes the \$7.6 billion US gasket and seal industry, with forecasts for 2016 and 2021 by type and market. The study also evaluates company market share and profiles industry players.

#2884 May 2012 \$4900

Construction Machinery in China

Demand for construction machinery in China is expected to rise 6.2 percent annually to 387 billion yuan in 2015. Cranes and excavators -- the dominant segment -- will be the fastest growing type, along with mixers and related equipment. The Central-East region will remain the largest market, while the North-west region will grow the fastest. This study analyzes the 287 billion yuan construction machinery industry in China, with forecasts for 2015 and 2020 by product and region. The study also evaluates company market share and profiles industry participants.

#2855 May 2012 \$5400

World Plastics Processing Machinery

Global demand for plastics processing machinery is projected to rise 6.0 percent annually through 2015 to \$28.9 billion. Gains will be driven by developing nations, most notably in the Asia/Pacific region. Extrusion equipment will post the strongest gains by product, while construction will be the fastest growing market. This study analyzes the \$22 billion world plastics processing machinery industry, with forecasts for 2015 and 2020 by product, application, world region and for 30 countries. The study also evaluates company market share and profiles industry players.

#2833 January 2012 \$5900

About The Freedonia Group

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States, the emerging China market, and other world markets. Industries analyzed by Freedonia include:

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