

Global Industrial Fastener Market

Industry Study with Forecasts for 2020 & 2025

Study #3482 | November 2016 | \$6500



Asia/Pacific region to account for nearly half of worldwide demand

The Asia/Pacific region will continue to account for the largest share of world fastener sales in 2020, representing 42 percent of the total at that time. Demand is expected to advance faster than the global average, as the world's four fastest growing fastener markets -- India, Thailand, Indonesia, and China -- are all located in the region. Industrialization activity in developing countries is also expected to stimulate strong gains in the Africa/Mideast, although it will remain a small share of the total.

Sales of fasteners in North America and Western Europe are expected to advance more slowly than the global average through 2020. Gains will be limited by the maturity of most fastener markets in these regions. Eastern Europe is forecast to fare somewhat better, as it becomes an increasingly important manufacturer of goods for export to Western Europe. Demand for fasteners in Central and South America is forecast to return to growth. Overall, production of industrial fasteners is concentrated on a national basis: the five major countries -- China, the US, Japan, Germany, and Taiwan -- accounted for two-thirds of global output in 2015.

Motor vehicle manufacturing to remain largest fastener market

Motor vehicle manufacturing will remain the largest single market for fasteners, accounting for 28 percent of total

demand in 2020. The aerospace equipment market is expected to post the fastest gains. Growth in demand for fasteners in the maintenance/repair/operations market is projected to trail advances in the original equipment manufacturing (OEM) market.

Standard types to outdistance aerospace-grade types

Standard fasteners (including externally threaded, internally threaded, and nonthreaded products) will represent 90 percent of total product sales in 2020. However, aerospace-grade products have increased their market share in recent years, and demand is expected to grow at an above average rate, benefiting from the strength of the aerospace equipment OEM market.

Study coverage

This Freedonia industry study analyzes the \$69.6 billion global industrial fastener market. It presents historical demand data (2005, 2010 and 2015) plus forecasts (2020 and 2025) by product (standard externally threaded fasteners, standard internally threaded fasteners, standard nonthreaded fasteners, standard application-specific fasteners, and aerospace-grade fasteners) and market (manufacturing of motor vehicles, machinery, electrical and electronic equipment, fabricated metal products, aerospace equipment, and other durable goods; maintenance/repair/operations; and construction). The study also evaluates company market share and offers competitive analysis on industry players.

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Industry Study with historical data for 2005,
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Iran: Demand for industrial fasteners in Iran totaled \$355 million in 2015, accounting for 12 percent of all regional sales. Between 2010 and 2015, fastener demand in the nation declined considerably, as the economy suffered from the effect of trade sanctions. In particular, a drop in motor vehicle output led to losses in fastener demand. Domestic industry shipments amounted to \$235 million in 2015, representing 66 percent of the Africa/Mideast total. As with demand, fastener production in Iran fell sharply between 2010 and 2015. The country is a net importer of fasteners.

Industrial fastener demand per annum to 2020 is expected to remain strong as relationships with motor vehicle manufacturers remain at a high level.

Iran's fastener demand per annum through 2020 will benefit from its high-tech production operations and greater economies of scale, as the country's trade deficit will widen through 2020.

South Africa: Sales of industrial fasteners in South Africa totaled \$295 million in 2015, making it the third largest market in the Africa/Mideast region behind Turkey and Iran. Intensity of product use in the nation (measured against durable goods manufacturing value added) is well above the regional average. Demand for fasteners in South Africa is driven by the motor vehicle market, which accounts for over half of the total in most years. Although the nation has only modest fastener manufacturing capabilities, it is the third largest producer in the region behind Turkey and Iran. In 2015, industry shipments totaled \$180 million.

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This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

TABLE V-12

SPAIN: INDUSTRIAL FASTENER DEMAND BY MARKET (million dollars)

Item	2005	2010	2015	2020	2025
Motor Vehicle Production (000 units) \$ MV fasteners/vehicle produced					
Machinery Mfg Value Added (bil 2014\$) \$ machinery fasteners/000\$ machinery					
Industrial Fastener Demand					
Original Equipment Manufacturing:					
Motor Vehicles					
Machinery					
Electrical & Electronic Equipment					
Fabricated Metal Products					
Aerospace Equipment					
Other					
Maintenance/Repair/Operations					
Construction					
% Spain					
W Europe Industrial Fastener Demand					

Source: The Freedonia Group

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CHINA: INDUSTRIAL FASTENER SUPPLY & DEMAND (million dollars)

Item	2005	2010	2015	2020	2025
Durable Goods MVA (bil 2014\$) \$ fasteners/000\$ durables MVA					
Industrial Fastener Demand					
Standard:					
Externally Threaded					
Internally Threaded					
Nonthreaded					
Application-Specific					
Aerospace-Grade					
net exports					
Industrial Fastener Shipments					
% China					
Asia/Pacific Industrial Fastener Shipments					

Source: The Freedonia Group

Related Studies

World Abrasives

Global demand for abrasives is forecast to rise 4.4 percent per year to \$40.8 billion in 2020. The world's four fastest growing markets for abrasives over the 2015-2020 period will be the Asian countries of China, India, Indonesia and Thailand, though regional gains will be blunted by a sluggish outlook in Japan. This study details the \$33 billion global market for abrasives, providing forecasts for 2020 and 2025 for supply and demand, as well as by market and product, in 6 regions and 23 countries. The study also evaluates market share and profiles US industry players.

#3428.....June 2016..... \$6000

Industrial Fasteners

The US market for industrial fasteners is forecast to grow 2.6 percent per year to \$15.2 billion in 2020. The fastest growth will be in the construction market as construction activity rises at a solid rate. Aerospace-grade fastener demand is expected to outpace gains in standard fastener sales, due to healthy conditions in aerospace manufacturing. This study presents historical demand data plus forecasts for 2020 and 2025 by product and market in the US industry. The study also assesses market environment factors, evaluates company market share and profiles industry players.

#3413..... May 2016 \$5300

World Gaskets & Seals

World demand for gaskets and seals will rise 5.3 percent per annum to \$70.8 billion in 2019. Growth in the machinery market will outpace motor vehicles. India will be the fastest growing national market, while China will post by far the largest advances in value terms. This study analyzes the \$54.7 billion world gasket and seal industry, with forecasts for 2019 and 2024 by market and application for six world regions and 18 major countries. Total demand is given for an additional 9 countries. The study also evaluates company market share and profiles leading competitors.

#3345..... December 2015 \$6200

World Magnets

Global demand for permanent magnets is forecast to climb 7.3 percent annually through 2019 to \$16.2 billion. The Asia/Pacific market will remain dominant and grow the fastest. Neodymium magnets will lead gains. This study analyzes the \$11.4 billion world magnet industry, with forecasts for 2019 and 2024 by product and market for six world regions and 19 major countries. Total demand is given for an additional 4 countries. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#3328..... October 2015 \$6300

Contact Freedonia

1.800.927.5900 (US & Canada)

+1 440.684.9600 (Int'l)

email: info@freedoniagroup.com

website: freedoniagroup.com

Freedonia's methods

- Establishing consistent economic & market forecasts
- Using input/output ratios, flow charts & other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts & end users
- Researching a proprietary database that includes trade publications, government reports & corporate literature

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