

Fasteners Market By Product (Externally Threaded, Internally Threaded, Non threaded), By Sales Channel (Online, Offline), By End-Use (Automotive, Building and Construction, Aerospace, Machinery, Electronics, Others): Global Opportunity Analysis and Industry Forecast, 2022 - 2032

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Abstracts

The global fasteners market was valued at \$97.2 billion in 2022, and is projected to reach \$151 billion by 2032, growing at a CAGR of 4.6% from 2023 to 2032.

Fasteners are essential components used in various industries and applications to secure two or more objects together. They come in a wide range of shapes, sizes, and materials, serving diverse functions from holding structural components together to securing electronic devices. They play a crucial role in ensuring structural integrity, safety, and functionality across numerous applications. Fasteners are integral components in virtually every industry, including construction, automotive, aerospace, electronics, manufacturing, and consumer goods. Their importance lies in providing reliable connections that withstand various forces, vibrations, and environmental conditions. Without effective fastening solutions, the stability and durability of structures, machinery, and products would be compromised, leading to safety hazards and operational inefficiencies.

In the aerospace and aviation industries, fasteners are subjected to extreme conditions, including high temperatures, pressure differentials, and dynamic loads. Aerospace-grade fasteners are engineered to meet stringent standards for strength, fatigue resistance, and lightweight construction. They are used in aircraft assembly, propulsion systems, airframes, and interior components, where precision and reliability are

paramount for flight safety. Fasteners are essential in the assembly of electronic devices, appliances, and technological gadgets, where miniaturization and precision are key considerations. Specially designed screws, nuts, and bolts are used to secure circuit boards, enclosures, connectors, and components in smartphones, laptops, televisions, and consumer electronics. These fasteners must be small, lightweight, and corrosion-resistant to maintain the integrity of electronic assemblies.

Fasteners play a critical role in automotive manufacturing and assembly, where they are utilized in vehicle chassis, engines, interiors, and exteriors. High-strength bolts and screws are employed to secure components such as engine blocks, transmission systems, body panels, and interior trim. Automotive fasteners must meet strict requirements for reliability, weight reduction, and corrosion protection to withstand the harsh conditions of road use.

Market Dynamics

Aerospace applications demand fasteners of the highest quality standards due to the rigorous safety and performance requirements in aircraft manufacturing. Fastener manufacturers supplying aerospace-grade components must adhere to stringent industry standards and certifications, such as AS9100, to ensure product reliability and compliance with regulatory requirements. Technological innovations in aircraft design, materials, and manufacturing processes drive the demand for advanced fastening solutions. Fastener manufacturers need to continually invest in R&D to develop specialized aerospace fasteners capable of withstanding extreme conditions, including high temperatures, vibrations, and pressures encountered during flight. The abovementioned advantages associated with the use of fasteners in the aerospace industry is expected to increase the demand for fasteners during the forecast period.

In March 2023, Emirates, the leading Dubai-based airline renowned for its extensive fleet of Airbus A380 aircraft, solidified its commitment to top-notch maintenance standards by forging significant partnerships with Lufthansa Technik AG. Under these contracts, Lufthansa Technik will deliver comprehensive maintenance, repair, and overhaul (MRO) services tailored specifically for Emirates' A380 fleet where fasteners is used for high-strength bolts designed to withstand heavy loads and vibration. This collaboration ensures Emirates access to Lufthansa Technik's extensive expertise and resources, guaranteeing seamless support for critical maintenance tasks such as C-checks and main landing gear overhauls for its iconic double-decker aircraft.

The fasteners market faces a significant restraint in the form of competition from

substitutes, including such as adhesives and welding. Adhesives offer advantages such as uniform distribution of stress, vibration dampening, and corrosion resistance, making them attractive alternative to traditional mechanical fasteners in certain applications. The industries such as automotive, aerospace, and electronics increasingly utilize adhesives for bonding components, reducing the reliance on conventional fasteners. Welding provides a permanent and robust joining method suitable for heavy-duty applications, structural assemblies, and high-stress environments. In industries the such as construction, automotive manufacturing, and shipbuilding, welding is often preferred over fasteners for its ability to create seamless connections and streamline assembly processes. Thus, the availability of substitutes restrain the growth of the fasteners market.

Segmental Overview

The global fasteners market is segmented into product, sales channel, end use, and region. On the basis of product, the market is classified into externally threaded, internally threaded, and non-threaded. By sales channel, it is divided online and offline. Depending on end use, it is segregated into automotive, building and construction, aerospace, machinery, electronics, and others. Region wise, the market is studied across North America, Europe, Asia-Pacific, and LAMEA.

On the basis of product non threaded segment is the fastest growing segment representing the CAGR of 5.0% during the forecast period. Fasteners are often utilized in snap-fit connections, where components interlock securely without the need for threading. This is common in consumer electronics, automotive interiors, and household appliances. Plastic clips and snaps provide quick assembly and disassembly, facilitating easier maintenance and repair.

On the basis of end-use aerospace is the fastest-growing segment representing the CAGR of 5.4% in fasteners market from 2023 to 2032. In aerospace engineering, fasteners are vital for maintaining the structural integrity of airframes, wings, fuselage, and other critical components. They ensure that different parts of the aircraft remain securely attached, even when subjected to high levels of stress, vibrations, and dynamic forces during flight.

Region wise Asia-Pacific is the fastest growing segment of representing the CAGR of 5.0% in the fasteners market during the forecast period. China leads the Asia-Pacific region in fastener consumption due to its massive manufacturing sector. Fasteners are extensively used in automotive, electronics, construction, and machinery industries.

With China's focus on infrastructure projects, demand for fasteners for bridges, railways, and buildings remains high.

Competitive Analysis

The report covers profiles of key industry participants such as Stanley Black & Decker, Inc., NORMA Group, Fontana Finanziaria S.p.A., Precision Castparts Corp., LISI GROUP, ARaymond, PennEngineering, Sundram Fasteners Limited, Group USA, Inc, and Trifast plc.

Recent Key Developments in the Fasteners Industry

According to the Aerospace Industries Association of Canada (AIAC), the aerospace sector generates (CAD 31 billion) \$23 billion in annual revenue. Approximately 80% of Canada's aerospace sector is civil-oriented, and 20% is military-oriented..

In April 2022, Samsung partnered with ABB Group, a leader in power and automation solutions. This partnership was aimed to expedite the integration of SmartThings into more buildings and homes where fasteners are used to provide essential support, stability, and functionality to floors, roofs, and foundations. In addition, this partnership would allow users to lower costs and create a more positive environmental impact.

Key Benefits For Stakeholders

This report provides a quantitative analysis of the market segments, current trends, estimations, and dynamics of the fasteners market analysis from 2022 to 2032 to identify the prevailing fasteners market opportunities.

The market research is offered along with information related to key drivers, restraints, and opportunities.

Porter's five forces analysis highlights the potency of buyers and suppliers to enable stakeholders make profit-oriented business decisions and strengthen their supplier-buyer network.

In-depth analysis of the fasteners market segmentation assists to determine the

prevailing market opportunities.

Major countries in each region are mapped according to their revenue contribution to the global market.

Market player positioning facilitates benchmarking and provides a clear understanding of the present position of the market players.

The report includes the analysis of the regional as well as global fasteners market trends, key players, market segments, application areas, and market growth strategies.

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Manufacturing Capacity

End user preferences and pain points

Product Benchmarking / Product specification and applications

Upcoming/New Entrant by Regions

Consumer Preference and Product Specifications

New Product Development/ Product Matrix of Key Players

Patient/epidemiology data at country, region, global level

Additional company profiles with specific to client's interest

Additional country or region analysis- market size and forecast

Average Selling Price Analysis / Price Point Analysis

Historic market data

Import Export Analysis/Data

Key player details (including location, contact details, supplier/vendor network etc. in excel format)

SWOT Analysis

Volume Market Size and Forecast

Key Market Segments By Product Internally Threaded

Non threaded

Externally Threaded

By Sales Channel Online

Offline

By End-Use Automotive

Building and Construction

Aerospace

Machinery

Electronics

Others

By Region

North America U.S.

Canada

Mexico

Europe Germany

France

UK

Spain

Italy

Rest of Europe

Asia-Pacific China

India

Japan

South Korea

Australia

Rest of Europe

LAMEA Brazil

South Africa

Saudi Arabia

Rest of LAMEA

Key Market Players

Stanley Black & Decker, Inc.

NORMA Group

Fontana Finanziaria S.p.A

Precision Castparts Corp

Lisi Group, LLC

Araymond

PennEngineering

Sundram Fasteners Limited

SFS Group USA, Inc

Trifast plc

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