

Industrial Fasteners Market - Global Outlook & Forecast 2020-2025

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Abstracts

In-depth Analysis and Data-driven Insights on the Impact of COVID-19 Included in this Global Industrial Fasteners Market Report

The industrial fasteners market by revenue is expected to grow at a CAGR of close to 5% during the period 2019–2025.

The global industrial fasteners market is set to display impressive growth during the forecast period. Increased diversity of substrate materials driven by continuously evolving end-user expectations and the rise of industry 4.0 and IoT are the major factors influencing the growth of the market. Innovative manufacturing, which was once a stronghold of the US and a few European economies such as France, Italy, and Germany, has expanded in emerging economies, with next-generation largescale manufacturing centers planned predominantly in the APAC region. The same is likely to be significantly complemented by an overwhelming rise in the global automation expenditure. The demand for industrial fastening solutions is driven by tremendous manufacturing and construction growth in countries such as India and China, supported by favorable demographics, large indigenous consumption, and a supportive regulatory and investment environment. The establishment of semiconductor fabs and electronic assembly units in Japan, South Korea, Taiwan, and China, which involve the highest degree of innovations, is set to increase the demand for ingenious and specialty fasteners.

The global industrial fasteners market suffered a downfall during the COVID-19 crisis as most economic activities were halted during Q1 and Q2 2020. Major revenue-generating end-users of construction, automotive, machinery, and aerospace manufacturing activities were affected, leading to a decline in demand for new

fasteners.

The following factors are likely to contribute to the growth of the industrial fasteners market during the forecast period:

Advancements in CNC, Milling, and CAD

Internationalization in Automobile Segment

3D Printing and Usage of New Materials

Industry 4.0 and Smart Manufacturing

The study considers the present scenario of the industrial fasteners market and its market dynamics for the period 2019-2025. It covers a detailed overview of several market growth enablers, restraints, and trends. The report offers both the demand and supply aspect of the market. It profiles and examines leading companies and other prominent ones operating in the market.

GLOBAL INDUSTRIAL FASTENERS MARKET SEGMENTATION

This research report includes a detailed segmentation by material, type, end-users, and geography. Industrial metal fasteners accounted for the largest share in 2019. These fasteners have high automotive, aerospace, construction, electronics, machinery, and consumer appliances. Manufacturing innovative products such as specialty, miniature, and hybrid fasteners to meet the changing consumer demand will complement growth. However, the substitution of metal fasteners with adhesives and tapes in bonding and NVH applications, especially in the automotive industry, is expected to hamper the growth of the industrial fasteners market.

The global automotive fasteners market is expected to reach over USD 34 billion by 2025. The adoption of fasteners in both automobile and automobile manufacturing units has grown considerably. With globalization, more foreign players are scaling up their operations and expanding their footprint in APAC and Latin American countries to benefit from favorable FDI and other corporate-friendly policies. Europe and North America are facing increased competition from APAC-based vehicle manufacturers.

The demand for threaded fasteners is likely to grow at a CAGR of over 4% during the

forecast period owing to their increasing application in construction, industrial machinery, railways, cars, and motorcycle manufacturing. Innovations in design to provide better performance and vibration resistance are projected to have a positive impact on the market. Stainless steel is the most common material used for manufacturing threaded fasteners. Brass, alloy steel, and aluminum are other materials used to manufacture threaded fasteners.

Segmentation by Material

Metal

Non-metal

Segmentation by Type

Threaded

Non-threaded

Specialty

Segmentation by End-users

Automotive

Aerospace

Construction

Industrial & Consumers Machinery

Consumer Appliances and Furniture

INSIGHTS BY GEOGRAPHY

APAC hosts one of the most robust manufacturing industries, including automotive,

construction, chemicals, defense, and aerospace. The region is home to highly enthusiastic tech-savvy professionals and a hub for millennials. Millennials account for the bulk usage of tech products and are the target audience for robotic and automation vendors, especially in B2C segments. Owing to the high demand for tech products, the market in APAC holds a key area of interest for vendors in the manufacturing sector, thus presenting high demand for vendors offering fasteners for industrial and manufacturing sectors. The consumption in the APAC region is on the rise due to its enormous population and increasing disposable incomes. China is expected to add 400 million consumers whose annual incomes are more than USD 8,000.

Segmentation by Geography

North America

US

Canada

Europe

UK

Germany

France

Italy

Spain

APAC

China

Japan

South Korea

India

Singapore

Latin America

Brazil

Mexico

Middle East & Africa

GCC

Turkey

Israel

INSIGHTS BY VENDORS

The global industrial fasteners market is highly fragmented, with no major vendors taking up a significant share in the market – the leading eight players account for around 20% of the market share. The number of fastener manufacturers is also considerable in manufacturing countries. For instance, Japan has over 3,000 manufacturers with manufacturing fasteners worth USD 9 billion annually. The sale, however, was nearly half of the capacity at around USD 4.30 billion in 2019. Vendors are mainly located near manufacturing centers to enable collaboration on the design and development of fasteners and other assembly products. A downturn in one of the end-market categories does likely not impact the overall market. The market is characterized by vendors that are application-specific, product-specific, or multiple-service vendors at any point in time.

Prominent Vendors

Stanley Black & Decker

Hilti

ITW

Berkshire Hathaway

Howmet Aerospace

LISI

NIFCO

Fontana Gruppo

Other Prominent Vendors

3M

A&G Fasteners

A.Agrati Group

Aoyama Seisakusho

APL

ARaymond

B&B Specialties

Wilhelm Bollhoff

Bolthead

Bulten

Caparo

CBC Fasteners

Deepak Fasteners

EJOT

Ever Hardware Industrial

Federal Screw Works

FUCHS

Gem-Year

KAMAX Group

KOVA Fasteners

MacLean-Fogg

Penn Engineering and Manufacturing (TINICUM)

THE (TONG HWEI ENTERPRISE)

Wurth Group

Virginia Fasteners

Key Questions Answered:

What is the expected market size of the global industrial fasteners market in 2025?

What are the factors impacting the growth of the market?

What are the drivers, trends, and restraints in the market?

Who are the leading vendors and what are their market shares?

What is the impact of the COVID-19 pandemic on the industrial fasteners market?

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