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Global Direct Screwing Fastener Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Direct Screwing Fastener market size is expected to reach $ 4150 million by 2032, rising at a market growth of 6.1% CAGR during the forecast period (2026-2032).

Direct Screwing Fastener refers to self-tapping and direct-thread-forming fastening products designed to create or form a mating thread directly in the receiving material during installation, enabling joining without a conventional pre-tapped internal thread. The market is structured around Direct Screwing Fasteners for Metal and Direct Screwing Fasteners for Plastics. Metal products are engineered for substrates such as carbon steel, stainless steel, aluminum, light alloys and sheet metal, using thread-forming, thread-cutting, self-tapping or related direct-fastening geometries to achieve controlled installation torque, clamp load and pull-out resistance. Plastic products use specialized thread profiles and forming geometries matched to thermoplastics, engineering plastics, fiber-reinforced polymers and composite structures, with emphasis on limiting radial stress, maintaining preload and reducing cracking or relaxation. The products are widely used in automotive components and vehicle assembly, building structures and construction components, industrial machinery and equipment assembly, household appliances and electrical equipment, aerospace structures and interior components, and other engineered assemblies where process simplification, reduced part count, automated installation and reliable joint performance are required.

Key Findings

Metal direct screwing fasteners form the broader demand base across automotive, construction, machinery and equipment assembly

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Automotive components and vehicle assembly represent a core high-value application requiring lightweight, repeatable and automation-compatible fastening

Plastic direct screwing fasteners are gaining importance with wider use of engineering plastics, reinforced polymers and composite structures

Competition combines specialized European fastening technology leaders with established US, Japanese and increasingly capable Chinese manufacturers

Bulten signed an agreement in July 2026 to divest its European automotive contract manufacturing operations

Market Trends

The Direct Screwing Fastener market is moving from standardized self-tapping products toward application-engineered fastening systems optimized for specific substrate combinations, joining loads and automated assembly conditions. In metal applications, development is focused on thinner high-strength steels, aluminum, mixed-material structures and single-side joining, creating demand for geometries that can form holes and threads while maintaining joint strength and reducing flange dimensions. ARNOLD's Flowform® Plus development illustrates this direction by targeting higher-strength sheet materials and reduced fastener dimensions for lightweight automotive structures. In plastics, product development is shifting toward engineered thread profiles capable of maintaining preload in high-performance thermoplastics, fiber-reinforced materials and increasingly bio-based composites. At the same time, design support is becoming more digital: torque prediction, clamp-load simulation, material-specific core-hole optimization and early-stage joint validation are increasingly integrated with the fastener itself. This changes the competitive basis from unit screw price toward total assembly cost, process stability and engineering support.

Market Dynamics

Drivers

Market demand is supported by manufacturers' continuing efforts to shorten assembly processes, reduce component count and improve production automation. Direct

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screwing can eliminate or reduce operations such as conventional tapping, separate inserts and additional joining preparation, which is particularly attractive in high-volume automotive, appliance and industrial assembly. Lightweight design is another structural driver: increased use of aluminum, thinner high-strength steel and engineering plastics creates new fastening requirements that conventional metric screw joints cannot always address efficiently. The ability to integrate thread creation and fastening into a single installation step also improves line productivity and simplifies logistics. In plastic assemblies, eliminating separate metal inserts can reduce weight and assembly complexity, while application-specific thread geometries help maintain joint performance under thermal and mechanical loading.

Restraints

The market remains constrained by the technical sensitivity of direct fastening to substrate properties, joint geometry and installation parameters. Fastener performance can vary materially with sheet thickness, plastic hardness, fiber content, pilot-hole geometry, temperature, surface condition and driver accuracy, making product substitution less straightforward than for commodity screws. High-performance products also require controlled cold forming, thread rolling, heat treatment, surface treatment and inspection, increasing qualification and manufacturing costs. Raw-material and energy price fluctuations affect carbon steel, alloy steel and stainless steel fasteners, while automotive and aerospace customers impose long validation cycles and stringent traceability requirements. These factors can slow adoption of new designs even where their total assembly economics are favorable.

Opportunities

The strongest opportunities lie in applications where material substitution and assembly redesign are occurring simultaneously. Electric vehicles, lightweight vehicle structures, battery-related housings, electronic modules and mixed-material body assemblies create additional demand for fastening systems compatible with thinner steel, aluminum and engineering polymers. Plastic direct screwing fasteners also have room to expand as high-performance and fiber-reinforced plastics replace metal components in automotive, electrical and industrial equipment. Development of fasteners for bio-based composites and new polymer formulations opens another emerging niche. Beyond product sales, suppliers able to provide fastening simulation, joint testing, installation-window optimization and application engineering can capture a larger share of value because customers increasingly evaluate the entire joining process rather than the

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fastener alone.

Challenges

The key challenge is achieving consistent fastening performance across increasingly diverse and lightweight substrates. The acceptable difference between thread-forming torque and failure or stripping torque can narrow when component walls become thinner or materials become more complex, increasing the importance of accurate joint design and process control. Suppliers must also balance clamp-load retention, vibration resistance, corrosion performance, removability and repairability without significantly increasing installation cost. Competition from riveting, clinching, welding, adhesives, inserts and conventional threaded joints remains application-specific but persistent. In addition, automotive supply-chain restructuring and localization can alter production footprints and customer relationships, requiring suppliers to maintain engineering support and manufacturing capability across multiple regions rather than relying solely on centralized exports.

Industry Chain Analysis

The upstream portion of the Direct Screwing Fastener industry primarily consists of carbon and alloy steel wire rod, stainless steel wire, specialty cold-heading materials, heat-treatment inputs, metallic and organic coating systems, lubricants and tooling materials. Tooling and process capability are particularly important because thread geometry, forming-zone design and point geometry determine installation torque, material displacement and load-bearing performance. Midstream production typically involves wire preparation, cold heading or multi-stage forming, thread rolling, tip or forming-zone manufacture, heat treatment, surface finishing, coating, dimensional inspection and automated sorting. Higher-value products add application engineering, torque testing, clamp-load measurement, durability validation and customized joint development. Official product and manufacturing information from leading suppliers confirms that direct fastening increasingly combines physical fastener manufacturing with engineering and validation capabilities rather than being limited to standard screw production.

Downstream value is generated in automotive components and vehicle assembly, construction components, industrial machinery, household appliances and electrical equipment, aerospace assemblies and other engineered products. Automotive

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customers typically place greater value on weight reduction, automated installation, traceability and joint validation, while construction demand emphasizes installation productivity, corrosion resistance and cost efficiency. Appliances and industrial equipment require high-volume consistency and rapid assembly, whereas aerospace-related applications place greater emphasis on material compatibility and reliability. As a result, profitability is generally more dependent on technical differentiation, manufacturing consistency, customer qualification and application engineering than on fastener weight or material content alone.

Segment Insights

Direct Screwing Fasteners for Metal represent the broader product base because metal assemblies remain prevalent across automotive structures, industrial machinery, construction and appliances. Within this segment, value is increasingly shifting from conventional self-tapping screws toward application-specific thread-forming and direct-fastening solutions for light alloys, thin sheet, high-strength steel and mixed-material joints. Advanced products can eliminate separate tapping operations, support single-side automated assembly and improve repairability by creating threads compatible with subsequent service fasteners. This gives specialized geometries and validated joint systems a higher value position than undifferentiated standard self-tapping products.

Direct Screwing Fasteners for Plastics represent a smaller but technologically intensive segment. Their performance depends heavily on thread profile, core-hole design, material flow characteristics, thermal relaxation and radial stress control. Demand is moving toward high-performance thermoplastics, reinforced polymers and composite materials, particularly where manufacturers seek to eliminate metal inserts, reduce weight and simplify assembly. This creates opportunities for suppliers with proprietary thread geometries and engineering tools rather than manufacturers competing principally on standard dimensions and price.

Downstream Market Opportunities

Automotive components and vehicle assembly remain the most strategically important high-value opportunity because direct screwing technologies can address lightweight structures, mixed-material joining, plastic components and increasingly automated production environments within the same end market. Building structures and construction components provide a broader volume-oriented market, particularly for self-tapping and direct-fastening solutions that reduce field installation steps. Industrial

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machinery and equipment assembly offers opportunities in repeated production joints requiring stable installation torque and simplified manufacturing. Household appliances and electrical equipment benefit from high-volume automated assembly and extensive use of sheet metal and molded plastics. Aerospace structures and interior components represent a more specialized opportunity where qualification requirements are higher but material compatibility, weight reduction and reliable fastening performance create stronger technical barriers to entry.

Regional Insights

Europe represents the principal technology-intensive competitive center for Direct Screwing Fasteners, supported by a dense base of specialized manufacturers in Germany, Switzerland, France, Italy, Sweden, Spain and the United Kingdom. The region is particularly strong in application-engineered thread-forming systems for automotive, plastics, light alloys and advanced sheet-metal joining. Germany has a notable concentration of suppliers focused on proprietary fastening geometries, engineering services and automotive applications. North America maintains a strong position in automotive and industrial engineered fasteners through established manufacturers with broad screw and thread-forming portfolios, while Japan remains important in precision automotive fastening and high-volume vehicle supply chains. The geographic footprint of major groups also means that market competition is increasingly based on local engineering and production support rather than headquarters location alone.

Asia, particularly China, combines large-scale fastener manufacturing capacity with growing participation in higher-value automotive, appliance, machinery and construction applications. The confirmed Chinese supplier base in this study spans stainless steel self-tapping fasteners, automotive and precision screws and broader engineered fastening products. Gem-Year operates large-scale fastener manufacturing and research activities, Zhejiang Tong Ming provides established self-tapping and self-drilling product lines, while Shandong Tengda's product portfolio includes self-tapping and drilling screws alongside standard and non-standard fasteners. This positions Chinese manufacturers strongly in scalable manufacturing and regional supply, while continued development of proprietary thread technologies, application validation and global OEM qualification will determine their ability to move further into premium direct-fastening niches.

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Competitive Landscape Analysis

The competitive landscape combines global engineered-fastener groups, specialist direct-fastening technology companies and regional volume manufacturers. EJOT SE & Co. KG and ARNOLD UMFORMTECHNIK GmbH & Co. KG are strongly positioned around proprietary thread-forming geometries, direct fastening in plastics and metals, lightweight design and engineering support; SFS Group AG and STANLEY Engineered Fastening combine fastening technology with broad international manufacturing and customer coverage; LISI AUTOMOTIVE, A. Agrati S.p.A., Bulten AB (publ) and Aoyama Seisakusho Co., Ltd. have deep exposure to automotive fastening requirements. ITW Shakeproof Industrial, Trifast plc, baier & michels GmbH & Co. KG, Richard Bergner Holding GmbH + Co. KG, Wilhelm Böllhoff GmbH & Co. KG, Semblex Corporation, CELO S.A., Hans Schriever GmbH & Co. KG, Mustad S.p.A. and Viteria Fusani Srl provide additional specialization across thread forming, plastics, metal sheet and customized fastening. In China, Shandong Tengda Fastener Technology Co., Ltd., Suzhou BaoQiang Precision Manufacturing CO.,LTD, Gem-Year Industrial Co., Ltd., Tong Ming Enterprise Co., Ltd. and Ningbo Risheng Fasteners Co., Ltd. broaden the competitive base through manufacturing scale, self-tapping product portfolios and regional customer support. Competition is therefore defined by a combination of proprietary geometry, process engineering, manufacturing cost, quality consistency and local service capability rather than corporate size alone. A notable structural development occurred on July 9, 2026, when Bulten entered into a binding agreement to divest its European automotive contract manufacturing operations to Maelir AB; completion is expected no later than October 2026, indicating a significant shift in Bulten's future manufacturing and automotive exposure.

Report Scope

This report studies the global Direct Screwing Fastener demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Direct Screwing Fastener, and provides market size (US$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Direct Screwing Fastener that contribute to its increasing demand across many markets.

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Highlights and key features of the study

Global Direct Screwing Fastener total market, 2021-2032, (USD Million)

Global Direct Screwing Fastener total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Direct Screwing Fastener total market, key domestic companies, and share, (USD Million)

Global Direct Screwing Fastener revenue by player, revenue and market share 2021-2026, (USD Million)

Global Direct Screwing Fastener total market by Substrate Types, CAGR, 2021-2032, (USD Million)

Global Direct Screwing Fastener total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Direct Screwing Fastener market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include EJOT SE & Co. KG, ARNOLD UMFORMTECHNIK GmbH & Co. KG, SFS Group AG, STANLEY Engineered Fastening, LISI AUTOMOTIVE, A. Agrati S.p.A., Bulten AB (publ), Aoyama Seisakusho Co., Ltd., ITW Shakeproof Industrial, Trifast plc, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Direct Screwing Fastener market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$

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Millions), by player, by regions, by Substrate Types, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Direct Screwing Fastener Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Direct Screwing Fastener Market, Segmentation by Substrate Types:

Direct Screwing Fasteners for Metal

Direct Screwing Fasteners for Plastics

Global Direct Screwing Fastener Market, Segmentation by Nominal Thread Diameter Types:

Small Diameter (<3 mm)

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Medium Diameter (3–6 mm)

Large Diameter (>6 mm)

Global Direct Screwing Fastener Market, Segmentation by Thread Generation Type:

Thread-Forming Direct Screwing Fasteners

Thread-Cutting Direct Screwing Fasteners

Flow-Hole-Forming Direct Screwing Fasteners

Others

Global Direct Screwing Fastener Market, Segmentation by Application:

Automotive Components and Vehicle Assembly

Building Structures and Construction Components

Industrial Machinery and Equipment Assembly

Household Appliances and Electrical Equipment

Aerospace Structures and Interior Components

Others

Companies Profiled:

EJOT SE & Co. KG

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ARNOLD UMFORMTECHNIK GmbH & Co. KG

SFS Group AG

STANLEY Engineered Fastening

LISI AUTOMOTIVE

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Bulten AB (publ)

Aoyama Seisakusho Co., Ltd.

ITW Shakeproof Industrial

Trifast plc

baier & michels GmbH & Co. KG

Richard Bergner Holding GmbH + Co. KG

Wilhelm Böllhoff GmbH & Co. KG

Semblex Corporation

CELO S.A.

Hans Schriever GmbH & Co. KG

Mustad S.p.A.

Viteria Fusani Srl

Shandong Tengda Fastener Technology Co., Ltd.

Suzhou BaoQiang Precision Manufacturing CO.,LTD

Gem-Year Industrial Co., Ltd.

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Tong Ming Enterprise Co., Ltd.

Ningbo Risheng Fasteners Co., Ltd.

Key Questions Answered

1. How big is the global Direct Screwing Fastener market?
2. What is the demand of the global Direct Screwing Fastener market?
3. What is the year over year growth of the global Direct Screwing Fastener market?
4. What is the total value of the global Direct Screwing Fastener market?
5. Who are the Major Players in the global Direct Screwing Fastener market?
6. What are the growth factors driving the market demand?

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