

## Report Information

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# Automotive Fasteners Market Research Report—Global Forecast till 2030

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## Description:

### Automotive Fasteners Market Overview:

The automotive fasteners market in terms of value is estimated to reach USD 53 Billion by 2030, registering a 5.95% CAGR during the forecast period.

Automotive fasteners are mechanical components used to connect or join two or more joints and parts in the vehicle. Fasteners are made up of aluminum, nickel, stainless steel, and others. The primary function of automotive fasteners is holding vehicle parts together to avoid their separation and prevent leakage from joints. The automotive industry is flooded with various fasteners, specifically for components due to the various shapes, sizes, designs, and qualities. The automotive fasteners market is driven by the growing need for technical development and design improvement in automotive fasteners. Moreover, increased demand for vehicle stability and reduced vehicle weight is expected to create opportunities for automotive fasteners vendors across the globe.

- Bulten AB, through its subsidiary PSM Fasteners Taiwan Ltd, opened a new production facility in Taipei, Taiwan. This advancement strengthened the company's position as an international supplier of fastener solutions and created conditions for future growth management.
- The Amphenol Corporation and Illinois Tool Works companies announced an agreement in which ITW would acquire the MTS Corporation system test as part of the Amphenol acquisition.

### COVID-19 Analysis of Automotive Fasteners Market:

- **Economic Impact**

With the continuous spread of the novel coronavirus across the world, auto makers are taking extreme measures in the form of plant closures to halt the spread of the COVID-19 outbreak. The situation remains uncertain as more European companies suspend work, and the US and Asia-Pacific automakers extend shutdown periods. The automakers' plans on North American production are an effort to slow the spread of the COVID-19 virus. However, the region is currently the global epicenter of the outbreak, with the daily number of confirmed cases outstripping the number in any other region. In the US and Canada, the government's response has been a combination of state or provincial, federal, and local measures. In other regions, governments apply seemingly ever-more stringent conditions on social interaction, travel, and workplace attendance. These regions are experiencing similar situations, which are having a marked effect on the economy and society and causing massive economic disruption, with the automotive industry at the center of this turmoil.

- **Impact On Supply Chain**

Countries across the globe are trying to strike a fine balance between protecting health, minimizing economic and social disruption, and respecting human rights. The growing spread of the COVID-19



pandemic has led to disruptions in the raw material market. Restrictions to shipping and industrial production are affecting multiple supply chains. Distribution of components is one of the key processes in manufacturing industries, which is facing challenges such as staffing of warehouses, need for direct distribution, and more intelligent and responsive allocation across channels due to the pandemic, which led to pressure on supply chains.

- **Impact On Raw Materials**

Automotive manufacturing is a complex process that involves the integration and assembling of several subcomponents to produce the final product. These components are sourced from several countries across the globe. The raw materials required to manufacture these subcomponents are also imported from different countries and continents, and the finished products will again be transported all over the globe. Thus, the dependency on logistics makes import and export of raw material, and the finished product has caused severe disruption in raw materials procurement.

**Automotive Fasteners Market Dynamics:**

**Automotive Fasteners Market Key Drivers:**

- **Demand For Stainless Steel for Automotive Manufacturing**

The changing lifestyles and growing service sector have increased focus on the benefits of automotive and public transport solutions to our growing mobility needs. Utilizing stainless steel for auto components, automotive fasteners, and chassis manufacturing is an instance of social, economic, and environmental considerations in material selection to gain a sustainable technical solution. Stainless steel is the most preferred option for automotive fasteners as it delivers fire-resistant, ease of fabrication, and a high strength-to-weight ratio. As the chassis of most new automobiles are made with steel or have steel as a major component, it gets easier to pair steel with steel fasteners. It also involves excellent recyclability. Furthermore, the high-strength stainless steel also offers excellent energy absorption in relation to the strain rate. Stainless steel is used for various types of threaded and non-threaded fasteners, which helps prevent corrosion and other consequences of external factors. These stainless-steel fasteners are suitable for ranges of temperature between -40° C and +80° C. There are more than 200 grades of stainless steel available in the market.

- *Following the completion of Amphenol's acquisition of MTS, Illinois Tool Works Inc. and Amphenol Corporation, a leading global provider of high-technology interconnect, antenna, and sensor solutions, announced an agreement under which ITW will acquire MTS Systems Corporation's Test & Simulation business.*
- *Bulten AB will open a new facility in China in November 2019 as part of a supply chain improvement strategy. As a result, Bulten's in-house cold forming, surface treatment procedures, and heat treatment for producing high-quality fasteners will be strengthened.*
- *TensionCam, which specialises in the creation of sensors for clamp force monitoring in screw joints, was acquired by Bulten AB. According to the terms of the acquisition, it now owns 27% of TensionCam's shares. Through this acquisition, the company has become a fastener technology leader, allowing it to offer customers unique and sustainable functionality while also facilitating profitable growth outside of the automotive industry.*

**Increasing Sales of Electric Vehicles**

The automotive sector has increased investments in the development of electric vehicles. Various governments of different countries and regulatory organizations worldwide are taking initiatives to increase awareness regarding the use of electric vehicles to reduce fuel consumption and save foreign exchange reserves. Electric mobility is an ideal solution for short and medium-range transportation for individuals as it offers high comfort, ease of driving and eliminates the need for a conventional vehicle. Moreover, it is a cost-effective alternative to fuel-driven vehicles. In electric vehicles, a high number of automotive fasteners are used to channel the circuitry efficiently and without any corrosion, short-circuitry, and loss of thermal transfer. Steel automotive fasteners are widely used in this sector, mostly because they are safe, sturdy, and robust. Government initiatives



are also continuously promoting the adoption of electric vehicles by reducing on-road taxes.

#### **Automotive Fasteners Market Key Restraints:**

- **High Capital Requirements**

Automobiles are made up of complex mechanical and electrical systems. They comprise hundreds of moving parts, which makes their development and maintenance complex and capital-intensive. Automotive fasteners ensure that the auto vehicle is in one state without any disbalances in different joined components/parts for improved seasonal performance and operation. The manufacturing process of automotive fasteners is costly and time-consuming and comprises several risks as a lot of things can go wrong if the component is not designed properly. The cost of research and product development for automotive fasteners is much greater than other components used in automobiles. Due to the scale of automobiles as a mode of over long distances, the critical safety requirements and technical standards that are set to regulate operations effectively, and the need to deliver suitably longlife, a significant amount of investment is required.

#### **Automotive Fasteners Market key Opportunities:**

- **Battery-Powered Trains**

Battery-powered trains are an emerging trend and an alternative way for trains, which run on non-electrified units to save energy. The high-capacity batteries installed on the trains are charged by electrified sections while running on non-electrified sections. Additionally, the growing replacement of combustion engines by battery-powered systems helps decrease maintenance and energy costs. It results in the successful implementation of battery-powered systems in trains to enhance passenger convenience. Furthermore, the increasing popularity of incorporating battery-powered systems in trains is expected to increase the demand for automotive fasteners in battery packs and charging stations as they can help improve the life of components joined together via rivets or nuts and bolts.

#### **Automotive Fasteners Market Segmentation:**

The global market for automotive fasteners solutions has been segmented based on type, application, sales channel, propulsion, and end use.

- *In November 2019, LISI Automotive of France developed the LISI insulating screw, which will be used to fasten circuits and starter alternator belt systems. This screw is designed to reduce energy losses in mild hybrid vehicles.*
- *W&E Sales, a company that sells specialty hand tools and automobile body fasteners, was purchased by Auveco, a company that sells body hardware and specialty fasteners to the automotive aftermarket. Bulten announced the completion of a cash-free acquisition of PSM International Holdings Limited in February 2020. The acquisition has strengthened Bulten's position in the international fasteners market, providing a solid foundation for the company's global expansion.*

Insights Based on the type of automotive fasteners, the global market is segmented into threaded and non-threaded fasteners. Threaded automotive fasteners, also known as bolts, have a head at one end and are secured with a nut at the other end. These fasteners are often inserted through a hole, fastened with a nut. A non-threaded fastener on the other side has no internal threading to hold it with other components. These fasteners show different mechanisms to secure the mechanical components.

Insights Based on the application, the global market is segmented into steel, aluminum, brass, nickel, plastic, and copper. Steel is the most used material for automotive fasteners depending on its application in the automotive industry. Stainless steel, alloy steel, and carbon steel are the commonly used materials for fasteners. Some of the manufacturers use aluminum bronze fasteners for increased strength, better corrosion capabilities, and high wear resistance. Aluminum fasteners are cheaper than other present metal fasteners. Brass fasteners are used for applications that require high tensile strength. Its tensile strength can reach even more than carbon steel. Nickel fasteners are manufactured as a part of a specific application. Nickel alloys have high solid solution strength, good electrical and thermal conductivity than steel alloys. Plastic fasteners are specifically used in applications where optical, environmental, thermal, and electrical properties are considered while manufacturing.



Insights Based on sales channel, the global market is segmented into OEM and aftermarket. Many OEMs install fasteners at the automotive production site to offer inbuilt fasteners facilities for the automobiles being manufactured. The aftermarket segment includes manufacturers who supply fasteners for automobiles after they have been manufactured by the OEMs. Some of the equipment sold in the aftermarket may not be manufactured by OEMs, and end users procure aftermarket products as replacements or accessories.

Insight Based on propulsion, the global market is divided into ICE and electric. The ICE vehicle primarily uses gasoline or diesel as a fuel along with renewable or alternative fuels (e.g., natural gas, propane, biodiesel, or ethanol). In IC engine vehicles, the ignition and combustion of the fuel occur within the engine itself. Then, the engine partially converts the energy from the combustion to mechanical work as the expanding combustion gases push the piston, which rotates the crankshaft. Electric vehicles are classified into Battery Electric Vehicles (BEVs) and Hybrid Electric Vehicles (HEVs). BEVs are powered by electric motors by deriving the power from battery packs instead of using ICEs.

Insights Based on end use, the global market is segmented into removable, semi-permanent, and permanent. Removable automotive fasteners are designed to join two materials or parts; however, these can be readily disconnected without damaging the fasteners or the part. Semi-permanent automotive fasteners are designed to join two materials or parts; however, on disconnecting the parts, some damages usually occur to the fasteners or the part. Permanent automotive fasteners are designed to join two materials or parts permanently. They are permanently attached to the vehicles and widely adopted by the vehicle OEM.

### **Automotive Fasteners Market Regional Analysis:**

Based on region, the report on the automotive fasteners market has been divided into North America, Europe, Asia-Pacific, and the Rest of the World.

- *Auveco, a specialty fastener and body hardware company based in the United States, paid an undisclosed sum for W&E Sales Company. The acquisition is expected to provide Auveco with new channel partner opportunities while allowing W&E to maintain its world-class product quality and customer service. W&E Sales Company is a company based in the United States that manufactures automotive specialized hand tools and fasteners.*

Asia-Pacific is expected to create scope for the fasteners market with high automobile sales in countries such as New Zealand, Australia, India, China, Japan, South Korea, and Indonesia. The automotive fasteners market is growing due to the increasing demand for vehicles with improved safety and fuel efficiency. Furthermore, government regulations for lightweight vehicles have led to technological advancements for manufacturing lightweight and durable products in the region. However, the high cost and low awareness regarding automotive components are the factors restraining the demand for automotive fasteners during the forecast period.

The growth in vehicle sales and an increase in the distance traveled by vehicles lead to a rise in the need for the maintenance and replacement of automotive parts. Key players such as BorgWarner Inc., Wells Vehicle Electronics, and Standard Motor Products, Inc. are spending on research & development to provide different types of materials used in various automotive fasteners applications. Furthermore, the existence of important vehicle manufacturers in this region, combined with the availability of sophisticated technologies, enables the automotive fasteners to enhance in this region. The government regulations regarding vehicle safety and emission in this region prompt the manufacturers to offer advanced and cost-effective systems, which leads to a rise in demand for automotive fasteners.

### **Automotive Fasteners Market Trends and Competitive Landscape:**

The global automotive fasteners market consists of various global and regional service providers that are continuously evolving to enhance their market position. Demand for stainless steel for automotive manufacturing and increasing sales of electric vehicles are the key factors aiding the market growth. However, high capital requirements are expected to limit the growth of the market during the forecast period. The automotive fastener manufacturers compete based on technology, efficiency, and reliability of products to sustain their global market presence. It is crucial for automotive fastener manufacturers to provide products or solutions according to the needs of the industry and customers' needs and advanced technology to maintain their market position and gain a competitive advantage. Vendors are focusing on improving their technologies and upgrading products and expanding into emerging economies.

### **Automotive Fasteners Market Key Competitors:**

The growth of the vendors is dependent on market conditions, government support, and industrial development. Thus, the vendors should focus on expanding their presence and improving their services. Sundram Fasteners Limited, ITW, Stanley Black & Decker, Kamax, Meidoh co. Ltd, Nipman Fasteners, Piolax, Norm Civata, Agrat, LISI, Brugola, Fontana, and Koninklijke Nedschroef are some of the key players operating in the global market.



## Recent Developments:

- January 2021: Bulten AB inaugurated a new production facility in Taipei, Taiwan, through its subsidiary PSM Fasteners Taiwan Ltd. Through this development, the company strengthened its position as an international provider of fastener solutions and created conditions for managing future growth.
- July 2020: Bulten AB signed a Full-Service Provider contract with a European automotive manufacturer to supply automotive fasteners.
- June 2020: Bulten AB acquired TensionCam, which specializes in the development of sensors for clamp force monitoring in screw joints. As per the terms of the acquisition, it became the owner of 27% of TensionCam's shares. Through this acquisition, the company has become a technology leader in fasteners and can offer customers unique and sustainable functionality and facilitate profitable growth even outside the automotive industry.
- July 2019: Norm Civata expanded its product portfolio with new investments in advanced technology machines. The new equipment allows to create larger, longer bolts and increase capacity. Based on high customer demand, customers can provide up to 300 mm long parts with very high-quality standards.

## Automotive Fasteners Market Report Overview:

The global automotive fasteners market has been segmented based on type, application, sales channel, propulsion, and end use. The global market is driven by factors such as the growing need for technical development and design improvement in automotive fasteners. Moreover, increased demand for vehicle stability and reduced vehicle weight is expected to create opportunities for automotive fasteners vendors across the globe.

## Automotive Fasteners Market Market Segmentation

- By Type (threaded and non-threaded)
- Application (steel, aluminum, brass, nickel, plastic, and copper)
- Sales Channel (OEM and Aftermarket)
- Propulsion (ICE and Electric)
- End Use (removable, semi-permanent, and permanent)

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