

# Players of Fastener Making Machines in the World

by Behrooz Lotfian

※ Values are in 1,000 USD



## Size of the Global Fastener Making Machines Market

The statistics show that the value of fastener making machines business was 15.5 billion USD in 2014 and it will experience a negative growth of around 4-5% in 2015 to 14.7 billion USD.

The business value peaked in 2012, but the interesting point is that in 2011 the business grew 34% within just a year!

### What Happened in 2011?

In 2011, original equipment manufacturing of motor vehicles was the largest market for fasteners. A study in the motor vehicles industry cleared up the substantial growth in the fastener making machines industry, and also we can explain the negative growth for the next years.

In 2010 the value of the motor vehicles industry grew 25.6%, which means investing in related industries can make a lot of profits for business owners and one of the related industries is the fastener industry. In 2015 many companies had their presence in the fastener field, and therefore, fastener making machine business also grew sharply. The growth in motor vehicle business went back to a normal rate of 3-5% during 2011-2014, which means these fastener factories could support the rate, and therefore the rate of setting up new fastener companies became negative and its results caused the negative rate in the fastener making machines business.

Motor vehicle industries' growth in the 1st and 2nd quarters of 2015 was 0.5%, which is predicted to cause a negative growth of around 4-5% in the fastener making machine business.

## Who are the Main Players in the Fastener Making Machine Industry?

### China

China with 1.45 billion USD export as the 4th largest exporter and 2.44 billion USD import as the largest importer was the biggest market for this business.

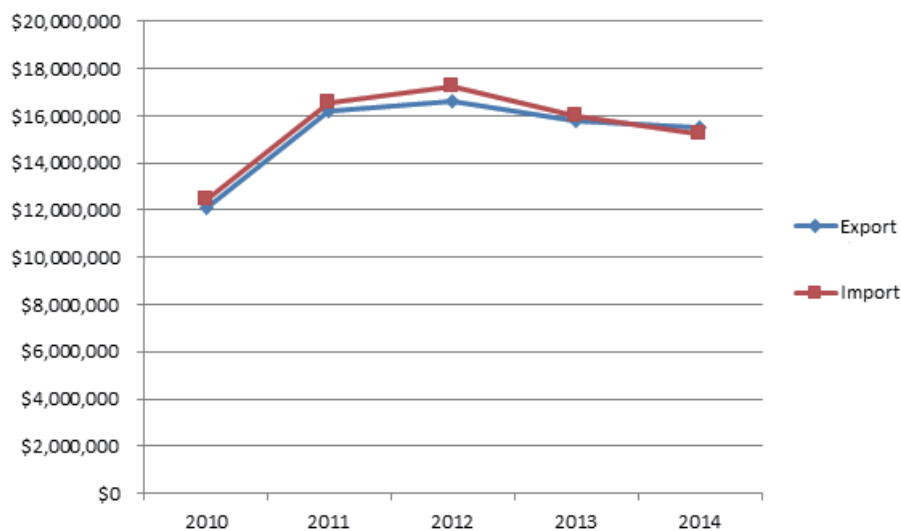
China's export in this field showed positive growth during 2011-2014, but on the other hand, China's import had a negative rate in the same period. The internal growth of this industry in China could be concluded by these statistics (in simple words, the growth of the industry has led to increased exports and decreased imports). Chinese machine producers could increase their market share around 3.3% in the world during 2011-2014 and they could reduce their dependence on global production more than 5% in the same period.

### Germany

Germany was not one of the top 5 importers, but it was the largest exporter in the world in this field. Its export value was around 3 billion USD.

Although Germany's growth rate of export dropped during 2011-2015, it still supplied around 20% of the world's need for fastener making machines through 2010-2014!

Fig 1. Market Scale of Fastener Machinery



World	2010	2011	2012	2013	2014
Export Value	\$ 12,084,688	\$ 16,204,568	\$ 16,621,988	\$ 15,808,229	\$ 15,505,902
Growth Rate	-	34.1%	2.6%	-4.9%	-1.9%
Import Value	\$ 12,425,328	\$ 16,560,198	\$ 17,225,684	\$ 15,967,649	\$ 15,200,734
Growth Rate	-	33.3%	4.0%	-7.3%	-4.8%

※ Values are in 1,000 USD

## USA

The USA with 1.07 billion USD was ranked the 5th top exporter and its import was around 1.48 billion USD, making it the 2nd largest importer in the world.

U.S. fastener making machine producers lost 0.8% of their global market from 2011 through 2014; on the other hand, the market got 3% bigger for overseas producers. The negative trend in their export value and the positive trend in their import value also prove this claim.

## Italy/Japan

Italy with 1.99 billion USD was ranked the 2nd largest exporter in the world. Although in 2012 it lost 1% of global market but it compensated 0.6% of it in 2014.

Japan was ranked the 3rd largest exporter in the world in the field of fastener making machines and its export value was around 1.96 billion USD.

The competition between Italy and Japan for getting the 2nd place among the top exporters is very interesting. Japanese machine producers outran Italian producers in 2011, and in 2012 Japan's share in the global market became 3% bigger than Italy's

through better machines with higher prices, making Italy withdraw from the 2nd place.

## Mexico/ Thailand /Russia

Mexico as the 3rd largest importer with a 850 million USD market value, Thailand as the 4th largest importer with a 830 million USD market value, and Russia as the 5th largest importer with a 700 million USD market values are competitors to each other.

Statistics show that Thailand could be a good market and it could be ranked the 3rd largest market in the world if they did not suffer the internal political problems during 2012-2013.

The following tables clear up the exporter and importer countries in this field. ※ Values are in 1,000 USD

Exporters	2010	2011	2012	2013	2014
Germany	\$2,400,000	\$3,321,864	\$3,436,056	\$3,162,945	\$2,991,248
Italy	\$1,604,932	\$2,141,755	\$2,032,721	\$1,937,418	\$1,985,152
Japan	\$1,394,863	\$2,390,994	\$2,501,300	\$2,071,801	\$1,959,872
China	\$747,557	\$978,033	\$1,108,583	\$1,205,145	\$1,446,798
USA	\$972,209	\$1,240,523	\$1,188,166	\$1,128,682	\$1,065,438



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Importers	2010	2011	2012	2013	2014
China	\$2,418,388	\$3,523,013	\$3,113,546	\$2,717,636	\$2,437,265
USA	\$718,780	\$1,111,666	\$1,430,077	\$1,434,382	\$1,478,134
Mexico	\$447,067	\$605,845	\$633,933	\$858,168	\$849,214
Thailand	\$535,816	\$781,771	\$1,224,112	\$972,724	\$830,425
Russia	\$465,087	\$601,417	\$734,165	\$721,682	\$701,621

China	2010	2011	2012	2013	2014
Export Value	\$747,557	\$978,033	\$1,108,583	\$1,205,145	\$1,446,798
Growth Rate	-	30.8%	13.3%	8.7%	20.1%
% of the Market Share	6.2%	6.0%	6.7%	7.6%	9.3%
Import Value	\$2,418,388	\$3,523,013	\$3,113,546	\$2,717,636	\$2,437,265
Growth Rate	-	45.7%	-11.6%	-12.7%	-10.3%
% of the Market Share	19.5%	21.3%	18.1%	17.0%	16.0%

Germany	2010	2011	2012	2013	2014
Export Value	\$2,400,000	\$3,321,864	\$3,436,056	\$3,162,945	\$2,991,248
Growth Rate	-	38.4%	3.4%	-7.9%	-5.4%
% of the Market Share	19.9%	20.5%	20.7%	20.0%	19.3%

USA	2010	2011	2012	2013	2014
Export Value	\$972,209	\$1,240,523	\$1,188,166	\$1,128,682	\$1,065,438
Growth Rate	-	27.6%	-4.2%	-5.0%	-5.6%
% of the Market Share	8.0%	7.7%	7.1%	7.1%	6.9%
Import Value	\$718,780	\$1,111,666	\$1,430,077	\$1,434,382	\$1,478,134
Growth Rate	-	54.7%	28.6%	0.3%	3.1%
% of the Market Share	5.8%	6.7%	8.3%	9.0%	9.7%

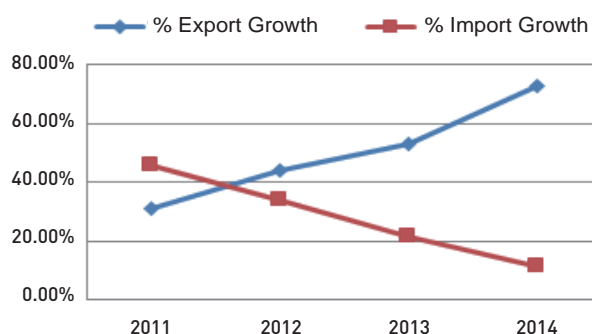
Italy	2010	2011	2012	2013	2014
Export Value	\$1,604,932	\$2,141,755	\$2,032,721	\$1,937,418	\$1,985,152
Growth Rate	-	33.4%	-5.1%	-4.7%	2.5%
% of the Market Share	13.3%	13.2%	12.2%	12.3%	12.8%

Japan	2010	2011	2012	2013	2014
Export Value	\$1,394,863	\$2,390,994	\$2,501,300	\$2,071,801	\$1,959,872
Growth Rate	-	71.4%	4.6%	-17.2%	-5.4%
% of the Market Share	11.5%	14.8%	15.0%	13.1%	12.6%

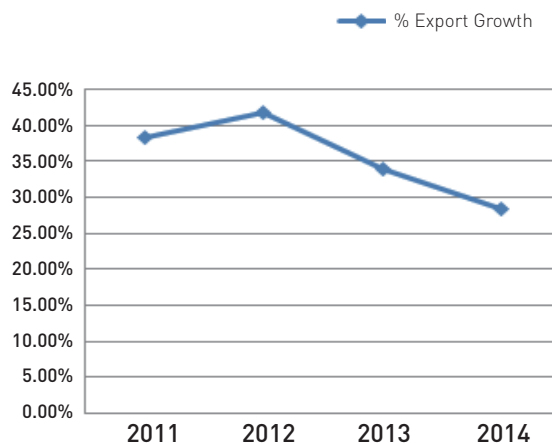
Importers	2010	2011	2012	2013	2014
Mexico	\$447,067	\$605,845	\$633,933	\$858,168	\$849,214
Growth Rate	-	35.5%	4.6%	35.4%	-1.0%
% of the Market Share	3.6%	3.7%	3.7%	5.4%	5.6%
Thailand	\$535,816	\$781,771	\$1,224,112	\$972,724	\$830,425
Growth Rate	-	45.9%	56.6%	-20.5%	-14.6%
% of the Market Share	4.3%	4.7%	7.1%	6.1%	5.5%
Russia	\$465,087	\$601,417	\$734,165	\$721,682	\$701,621
Growth Rate	-	29.3%	22.1%	-1.7%	-2.8%
% of the Market Share	3.7%	3.6%	4.3%	4.5%	4.6%

Taiwan	2010	2011	2012	2013	2014
Export Value	\$786,665	\$916,432	\$894,308	\$870,364	\$842,488
Growth Rate	-	16.5%	-2.4%	-2.7%	-3.2%
% of the Market Share	6.5%	5.7%	5.4%	5.5%	5.4%
Import Value	63,278	78,378	64,803	51,918	63,067
Growth Rate	-	23.9%	-17.3%	-19.9%	21.5%
% of the Market Share	0.51%	0.47%	0.38%	0.33%	0.41%

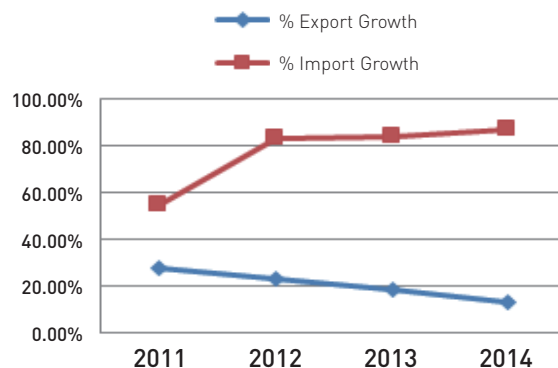
China Base Year of 2010



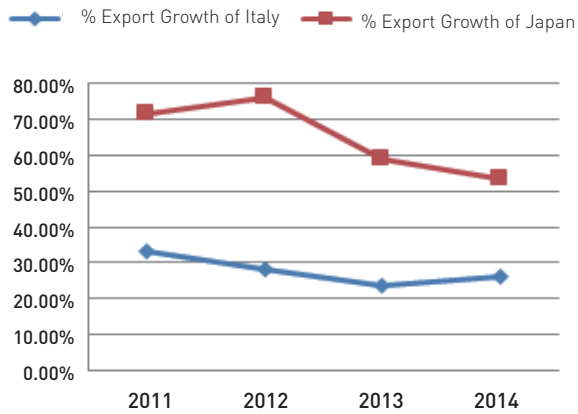
Germany Base Year of 2010



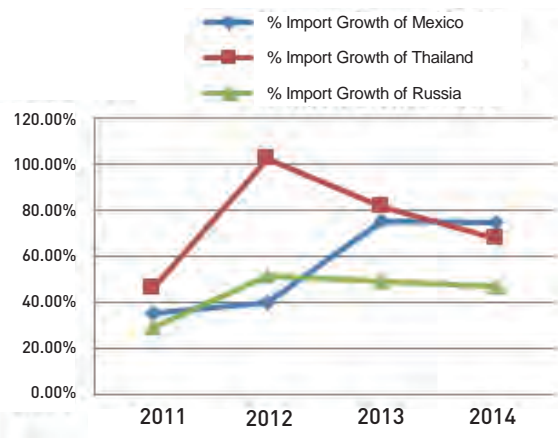
USA Base Year of 2010



### Italy/Japan Base Year of 2010



### Mexico/Thailand/Russia Base Year of 2010



Based on the market shares of Mexico and Russia, they were able to continuously (though slowly) expand their market.

## Last Word and Taiwan's Situation

Statistics show that Taiwan was in the top exporters list and it was the 6th largest exporter of fastener machines in the world with an 842.5 million USD export value. However, Taiwan might not be a good market for fastener machine producers, as only 0.4% of this type of machines were purchased by Taiwanese fastener producers.

Statistics show that although Taiwan kept the percentage of its market share, its market value dropped from 2011 to 2014.

If Taiwan wants to grow in this section, choosing a “focus strategy” is highly recommended. What does it mean?

Taiwanese fastener making machine producers manufacture a wide range of products. Some of them produce cheap and simple machines and some others are producers of high-tech and precision machines. So when buyers want to buy high-tech and precision machines, normally they will choose companies from Western countries such as Germany or Italy. On the other hand, if buyers want to buy cheap machines, they normally will choose companies from China! Or, if buyers want to buy machines that are neither too precise nor too expensive, they will choose Japanese manufacturers.

So, if Taiwanese producers choose the focus strategy, they also will label themselves with an adjective and this label will help buyers choose Taiwanese companies easier.