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mdm premium *EXTRA*

2015 Market Analysis Fasteners

ESTIMATED END-USER DEMAND BY REGION & END-MARKET

RESEARCHED
& PRODUCED BY:

mdm analytics



Market Analysis: Fasteners

This analysis of the U.S. for OEM /MRO Fastener consumption is being made available exclusively to MDM Premium subscribers as a bonus in partnership with MDM's data division, MDM Analytics. Read more about MDM Analytics and its capabilities at the end of this report.

Products included in this report:

- Fasteners Non-Threaded MRO
- Fasteners Non-Threaded OEM
- Fasteners Specialty OEM
- Fasteners Threaded MRO
- Fasteners Threaded OEM

About This Report

Due to slight variations in product groups included, as well as updates to the U.S. government database, data previously published by MDM on the size of the OEM/MRO market are not directly comparable to the data in this report.

The data in this Market Analysis for Fasteners OEM/MRO uses MDM Analytics' proprietary predictive modeling, which starts with a public aggregate market size estimate by product category for a given geography. MDM Analytics then uses a combination of public and private databases to allocate estimated demand to deeper geographic levels and to specific customer segments, as defined by the six-digit North American Industry Classification System (NAICS). This approach provides a total market size estimate without regard to market channels.

All estimates in this report are in U.S. dollars and represent the end-user market demand that includes an estimated average distributor margin by product category in the calculations.

MDM Analytics is the data division of Modern Distribution Management. Both are owned by Gale Media, Inc.

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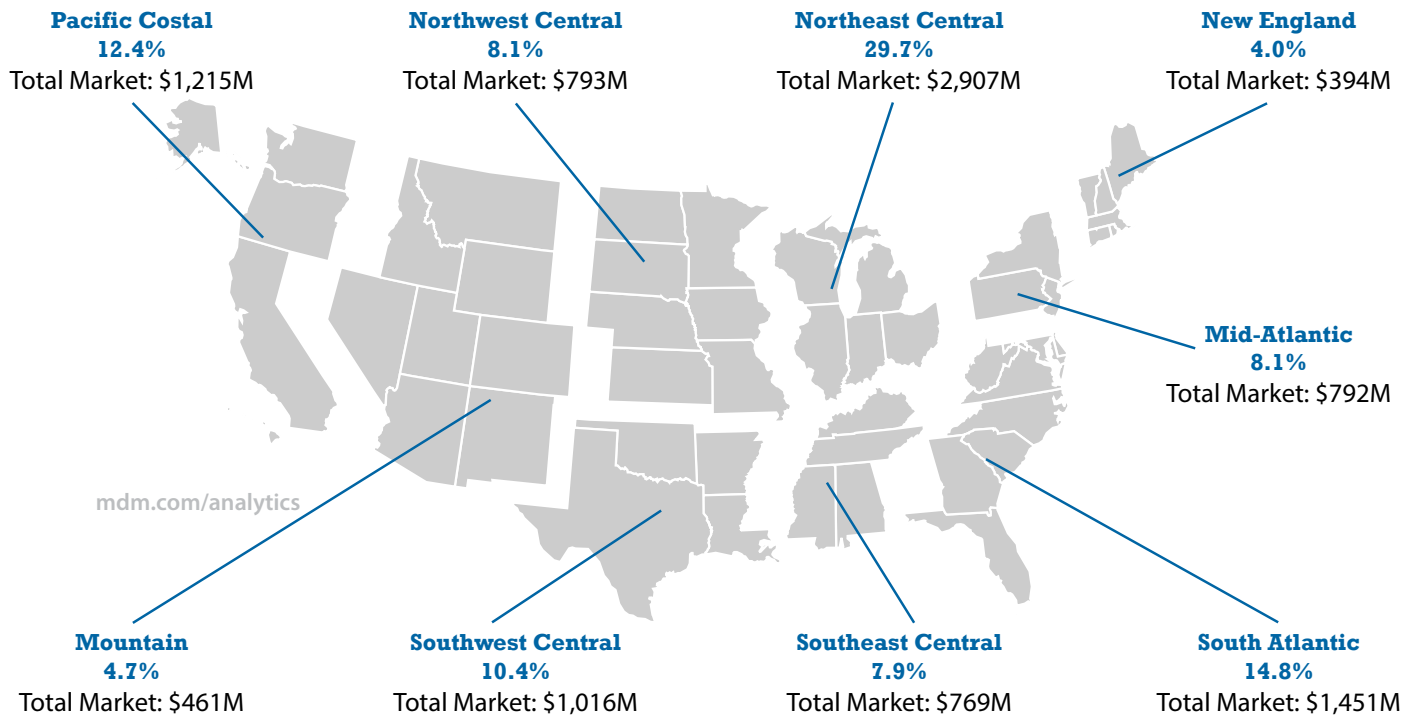
DATA METHODOLOGY NOTE:

The following data represent estimated consumption at the end-user level of fasteners OEM/MRO products in the U.S. based on the total market size of \$9,798 million, according to MDM Analytics. These estimates represent purchases at the end-user level in U.S. dollars and include the distributor margin. MDM Analytics estimates market demand at the end-user level using its proprietary predictive market model and a combination of government, private and industry databases.

Estimated Consumption of Fasteners OEM/MRO Products by Region

U.S. Total

Total Market: \$9,798 Million



Top 10 End-Markets Consuming Fasteners Products by 2 Digit NAICS

2 Digit NAICS	Definition	Estimated Consumption (Millions)
31-33	Manufacturing	\$8,426
23	Construction	\$1,139
21	Mining, Quarrying, and Oil and Gas Extraction	\$60
92	Public Administration	\$57
44-45	Retail Trade	\$22
42	Wholesale Trade	\$17
81	Other Services (except Public Administration)	\$16
22	Utilities	\$15
48-49	Transportation and Warehousing	\$8
11	Agriculture, Forestry, Fishing and Hunting	\$7

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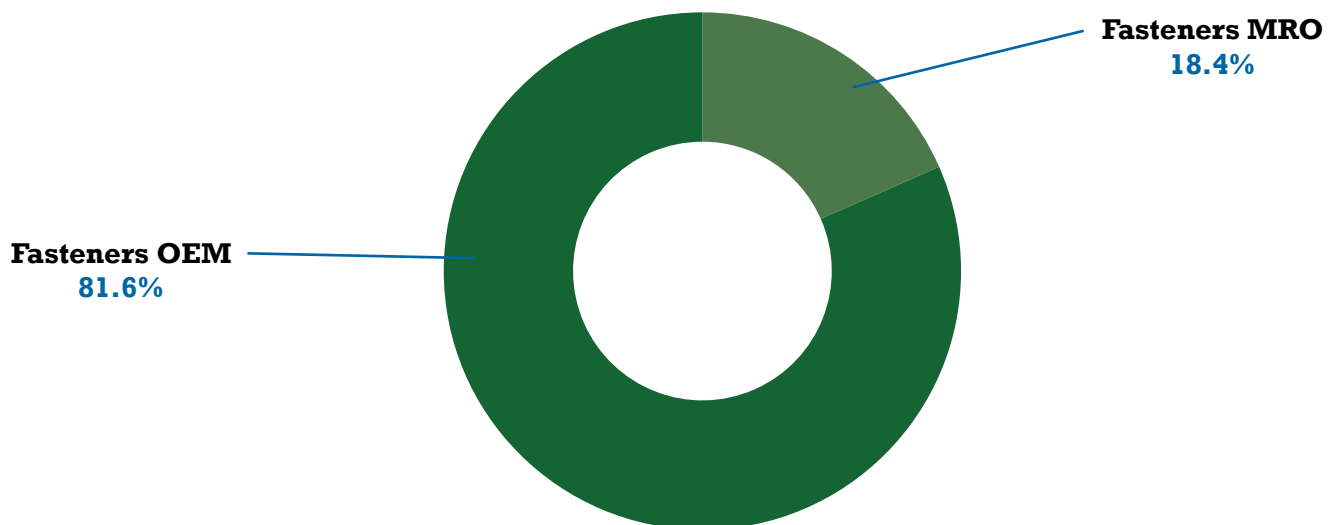
Top 10 End-Markets Consuming Fasteners Products by 6 Digit NAICS

6 Digit NAICS	Definition	Estimated Consumption (Millions)
336111	Automobile Manufacturing	\$1,173
336390	Other Motor Vehicle Parts Manufacturing	\$766
238220	Plumbing, Heating, and Air-Conditioning Contractors	\$307
336411	Aircraft Manufacturing	\$287
336120	Heavy Duty Truck Manufacturing	\$277
236220	Commercial and Institutional Building Construction	\$206
332312	Fabricated Structural Metal Manufacturing	\$201
333111	Farm Machinery and Equipment Manufacturing	\$185
332322	Sheet Metal Work Manufacturing	\$168
334310	Audio and Video Equipment Manufacturing	\$153

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Estimated Consumption of Fasteners: MRO vs. OEM

Consumption of Fasteners OEM was \$7,995 million and consumption of Fasteners MRO was \$1,803 million in 2014, according to data from MDM Analytics. Fasteners OEM includes: Fasteners Non-Threaded OEM, Fasteners Specialty OEM and Fasteners Threaded OEM. Fasteners MRO includes: Fasteners Non-Threaded MRO and Fasteners Threaded MRO.



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MDM Analytics, formerly Industrial Market Information, is the leading market analytics firm for industrial and construction products in North America. Since 1987, MDM Analytics has helped clients reach their full market potential with data services, dashboards and sales force management tools to target high-potential customers and markets.

MDM Analytics is an essential resource for clients seeking to:

- identify market penetration & untapped potential;
- target the highest potential geographic regions, customer segments & product categories;
- assess individual customer & prospect potential;
- more effectively deploy resources; and
- improve sales growth, margins and return on capital.

MDM Analytics' capabilities are built on a team of seasoned professionals and a unique database delivering reliable market size and segmentation services for more than 200 MRO/OEM products.



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