

Automotive Fastener Market Share Reach USD 98.74 Billion at a CAGR of 4.58%, Driving Global Demands and Trends Till 2035

Battery-electric vehicle platforms are forecast to grow fastener demand at a 4.66% CAGR to 2035, despite lower unit counts per vehicle.

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/EINPresswire.com/ -- Automotive

fasteners are mechanical joining components that permanently or temporarily secure two or more parts together within a vehicle assembly.

These essential components encompass a diverse range of products including threaded fasteners such as

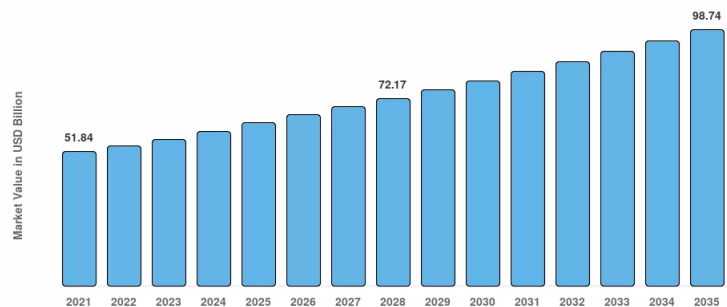
bolts, nuts, studs, and screws; non-threaded fasteners including rivets, clips, pins, and retaining rings; as well as specialty and safety-critical fasteners engineered for specific joining requirements. Fasteners serve as the fundamental building blocks of vehicle construction, ensuring structural integrity, safety, and reliability across every vehicle system, from powertrains

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Threaded fasteners captured approximately 57% of the Automotive Fasteners Market revenue in 2025, reflecting their dominance in powertrain, chassis, and interior assemblies.”

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Automotive Fasteners Market Size and Forecast



CAGR | 4.58%

Automotive Fastener Market Summary

and chassis to bodies, interiors, and electrical systems. The fastener represents the most frequently used component in automotive manufacturing, with a typical passenger car containing approximately 3,500 to 4,000 individual fasteners.

Automotive Fasteners Market Overview

The [automotive fasteners market trends](#) is positioned for steady growth through 2035, driven by global vehicle production, the increasing complexity of vehicle designs, and the continuing evolution of fastener technology to

meet lightweighting and electrification requirements. The projected valuation of USD 98.74 billion reflects sustained demand across both OEM and aftermarket channels, with advanced

fastener materials and designs capturing an increasing share of market value.

The market is experiencing steady growth driven by several fundamental factors. Global vehicle production volumes, while stabilizing in mature markets, are expanding in emerging economies, driving demand for fasteners across all vehicle segments. The increasing complexity of vehicle designs, driven by electrification, lightweighting, and advanced safety systems, creates demand for specialized fasteners capable of meeting unique joining challenges. The shift toward lightweight materials, including aluminum, composites, and advanced high-strength steels, requires fastener solutions optimized for specific material combinations and joining requirements. The aging vehicle parc in developed markets sustains aftermarket demand for replacement fasteners used in maintenance and collision repair.

Industry trends indicate a decisive shift toward lightweight fastener solutions to support vehicle weight reduction initiatives. The adoption of aluminum, high-strength steels, and plastic fasteners is accelerating as automakers pursue improved fuel efficiency and extended electric vehicle range. The growing use of mixed-material vehicle architectures creates demand for specialized fasteners capable of joining dissimilar materials, including bi-metallic connections and composite-to-metal joints. Modular vehicle assembly approaches are driving standardization and integration, with fasteners increasingly designed for simplified, error-proof assembly processes. The expansion of electric vehicle production creates demand for specialized fasteners for battery enclosures, electric motor assemblies, and charging system components.

Technological developments continue to advance fastener capabilities. The development of advanced coatings and surface treatments improves corrosion resistance, wear resistance, and durability across diverse operating conditions. Intelligent fasteners equipped with sensors for torque monitoring, loosening detection, and assembly verification are emerging in safety-critical applications. The application of advanced manufacturing technologies, including cold heading, thread rolling, and additive manufacturing, improves fastener quality, consistency, and production efficiency. Computer-aided engineering and finite element analysis enable optimized fastener design for specific load requirements and material combinations.

Policy and regulatory influence on the automotive fasteners market is significant. Safety regulations require fasteners to meet stringent mechanical performance standards, including tensile strength, fatigue resistance, and torque retention requirements. Vehicle safety standards, including crashworthiness and occupant protection requirements, necessitate robust fastening solutions for structural and safety-critical applications. Environmental regulations influence fastener materials and finishes, with restrictions on hexavalent chromium and other hazardous substances driving the adoption of alternative coating technologies. Regulatory frameworks governing vehicle emissions and fuel economy incentivize lightweighting, indirectly driving innovation in fastener materials and designs.

The demand outlook for automotive fasteners remains positive, supported by global vehicle production, the growing emphasis on vehicle lightweighting and safety, and aftermarket

replacement demand. The Asia-Pacific region dominates the market, driven by massive vehicle production in China, India, and Southeast Asian countries. While the long-term transition toward electric vehicles presents both challenges and opportunities, the fundamental requirement for joining components ensures sustained fastener demand across all vehicle propulsion types.

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Automotive Fasteners Market Segmentation

By Fastener Type

The automotive fasteners market is segmented by fastener type into Threaded Fasteners, Non-Threaded Fasteners, and Specialty & Safety-Critical Fasteners. Threaded fasteners represent the largest segment, encompassing bolts, nuts, studs, screws, and threaded inserts used extensively across all vehicle systems. These components provide reliable, serviceable, and torque-controlled joining solutions for powertrain, chassis, and body applications. Non-threaded fasteners include rivets, clips, pins, retaining rings, and grommets used in applications where detachable fastening is not required. Specialty and safety-critical fasteners include high-strength structural fasteners, wheel nuts and studs, and engineered components designed for specific joining challenges in safety-critical applications.

By Vehicle Type

Vehicle type segmentation includes Passenger Cars, Commercial Vehicles, and Two-Wheelers. Passenger cars account for the largest market share, driven by global production volumes and the wide variety of fastener applications across vehicle systems. Commercial vehicles, including light and heavy trucks, represent a significant segment with robust fastener requirements for high-load applications. Two-wheelers present a substantial market, particularly in Asian countries with high motorcycle production, requiring specialized fasteners for frame, engine, and suspension applications.

By Propulsion

Propulsion segmentation covers ICE Vehicles, Battery-Electric Vehicles, and Hybrid Vehicles. ICE vehicles continue to represent the largest segment, though their share is declining relative to electrified vehicles. Battery-electric vehicles present specialized fastener requirements for battery pack enclosures, electric motors, and power electronics, including specifications for electrical isolation and thermal management. Hybrid vehicles combine the fastener requirements of both ICE and electric vehicle systems, presenting unique joining challenges.

By Function

Function segmentation includes Detachable Fasteners and Non-Detachable Fasteners. Detachable fasteners are designed for applications requiring periodic disassembly for maintenance, repair, or service access, including engine components, chassis connections, and access panels. Non-detachable fasteners are used in permanent assemblies where disassembly is not required, including structural connections and body panels, utilizing rivets and adhesives.

By Material

Material segmentation covers Steel, Aluminum, Stainless Steel, and Plastics & Composites. Steel remains the dominant fastener material, valued for its strength, durability, and cost-effectiveness, with advanced high-strength steels increasingly used in lightweighting applications. Aluminum fasteners are gaining traction in lightweighting applications, providing significant weight reduction for non-structural applications. Stainless steel fasteners are preferred for corrosion-critical applications including exterior and underbody components. Plastics and composites are increasingly used in interior, trim, and electrical applications where weight reduction and corrosion resistance are paramount.

By Coating/Finish

Coating and finish segmentation includes Zinc Coatings, Phosphate Coatings, Organic & Dry-Film Technologies, and Chrome & Other Finishes. Zinc coatings, including electroplated and hot-dip galvanized, represent the most common fastener finish, providing excellent corrosion protection at moderate cost. Phosphate coatings provide base corrosion protection and serve as paint adhesion primers. Organic and dry-film technologies, including PTFE coatings and other proprietary lubricants, provide friction control and enhanced corrosion resistance. Chrome and other decorative finishes are primarily used for visible exterior applications.

By Application

Application segmentation includes Body & Exterior, Powertrain, Chassis & Suspension, Electronics & Electrical, and Interior. Body and exterior applications represent the largest segment, requiring fasteners for panels, closures, and trim. Powertrain applications demand high-strength fasteners capable of withstanding elevated temperatures and vibration. Chassis and suspension applications require structural fasteners with high tensile and fatigue strength. Electronics and electrical applications require specialized fasteners for control modules and electrical connections. Interior applications use fasteners for seating, instrument panels, and trim components.

By Distribution Channel

Distribution channel segmentation includes OEM (Direct Supply) and Aftermarket. The OEM segment dominates the market, driven by global vehicle production and the integration of

fasteners into new vehicle platforms through direct supplier relationships. The aftermarket segment is growing steadily, supported by the aging vehicle parc, collision repair demand, and maintenance requirements.

By Region

Regional segmentation includes North America, Europe, Asia Pacific, South America, and the Middle East and Africa. Asia-Pacific is the largest and fastest-growing regional market, driven by massive vehicle production in China, India, and Japan. Europe maintains a substantial share driven by advanced vehicle manufacturing and regulatory compliance. North America presents significant opportunities driven by vehicle production and aftermarket demand.

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Competitive Landscape / Key Players

The automotive fasteners market is characterized by a fragmented competitive landscape with global players, regional suppliers, and specialized manufacturers. Key companies include Würth Group (Germany), Illinois Tool Works (ITW) (US), Böllhoff Group (Germany), KAMAX (Germany), LISI Group (France), Acument Global Technologies (US), Stanley Black & Decker (US), Precision Castparts Corp. (US), Apex Fasteners (US), Sundram Fasteners (India), Nifco Inc. (Japan), Norma Group SE (Germany), Bulten AB (Sweden), and Fontana Gruppo (Italy).

Würth Group is a global leader in fastener distribution, offering comprehensive product portfolios for automotive applications across both OEM and aftermarket channels. Illinois Tool Works is a diversified industrial manufacturer with a significant presence in automotive fasteners, offering engineered fastening solutions for critical applications. Böllhoff Group specializes in engineered fasteners and assembly solutions, with particular expertise in joining technologies for mixed-material applications. KAMAX is a leading manufacturer of high-strength fasteners for automotive applications, with a strong focus on structural connections.

Strategic developments in the market include investments in lightweight fastener technologies, the development of specialized fasteners for electric vehicle applications, and the expansion of manufacturing capacity in emerging markets. Companies are focusing on innovation in materials, coatings, and manufacturing processes to meet evolving vehicle requirements. Manufacturers are also investing in automation and smart manufacturing technologies to improve quality consistency and production efficiency.

Latest Industry News & Developments

Recent industry developments highlight the ongoing evolution of the automotive fasteners market. Fastener manufacturers are investing in the development of lightweight fastening solutions to support vehicle lightweighting initiatives. The adoption of aluminum and high-strength steel fasteners is accelerating, while plastic and composite fasteners are finding increased application in interior and trim applications where weight reduction is a priority.

The electric vehicle transition is creating new opportunities for specialized fasteners. Battery pack enclosures require fasteners designed for thermal management, electrical isolation, and crash safety requirements. Electric motor assemblies require specialized fasteners capable of withstanding high RPM operation and magnetic field interference. Manufacturers are developing fasteners specifically engineered for these unique EV applications, including non-conductive fasteners and EMI shielding solutions.

In the sustainability domain, fastener manufacturers are investing in eco-friendly coating technologies to replace hexavalent chromium and other hazardous substances. Zinc-nickel coatings, trivalent passivation, and organic coatings are gaining adoption as regulatory pressure mounts. Manufacturers are also developing fastener solutions for lightweight structural applications, supporting the automotive industry's goal of reducing vehicle weight and improving fuel efficiency across all propulsion types.

Automotive Fasteners Market Challenges & Opportunities

Key restraints facing the automotive fasteners market include intense price competition and margin pressure from automotive OEMs seeking cost reductions. The shift toward electric vehicles reduces the total number of fasteners per vehicle compared to ICE vehicles, though the value per fastener increases due to specialized requirements. Material cost volatility, particularly for steel and aluminum, affects production costs and profitability. Supply chain disruptions, including shortages of raw materials and logistics capacity, can impact production schedules and component availability. The need for continuous innovation in materials and coatings adds to research and development costs.

Emerging opportunities in the market are diverse. The transition to electric vehicles creates opportunities for specialized fasteners for battery systems, electric motors, and power electronics. The growing emphasis on vehicle lightweighting drives demand for aluminum, high-strength steel, and composite fasteners. The expansion of the automotive aftermarket in emerging economies presents growth opportunities for replacement fastener sales. The adoption of smart fasteners equipped with sensors for assembly verification and condition monitoring creates opportunities for value-added products.

Future potential lies in the development of intelligent fastening systems for automated assembly processes, the adoption of additive manufacturing for customized fastener production, and the expansion of sustainable fastener solutions using recycled materials and eco-friendly coatings. The integration of fasteners with broader vehicle assembly systems, enabling error-proof

assembly and quality verification, presents the next frontier for innovation.

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The medium-term growth outlook remains positive, supported by global vehicle production volumes, the shift toward lightweight materials requiring specialized fastener solutions, and aftermarket replacement demand. Asia-Pacific will continue to lead market expansion, while Europe and North America maintain significant positions through technology leadership and regulatory-driven adoption.

Long-term industry potential is influenced by the trajectory of vehicle electrification and the evolution of vehicle assembly technologies. While electric vehicles typically contain fewer fasteners per vehicle than ICE vehicles, the value per fastener increases due to specialized requirements for thermal management, electrical isolation, and battery enclosure applications. Companies that successfully innovate in lightweighting technologies, EV-specific fastener solutions, and sustainable materials and coatings will capture disproportionate value in this evolving market. As vehicle architectures continue to evolve toward mixed-material, modular designs, fasteners will remain essential to ensuring structural integrity, safety, and reliable vehicle performance.

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