

United States Industrial Fasteners Market By Raw Material (Metal, Plastic), By Product (Externally Threaded Fasteners, Internally Threaded Fasteners, Non-threaded Fasteners, Aerospace Grade Fasteners), By Application (Automotive, Aerospace, Building and construction, Industrial Machinery, Home appliances, Lawns and Gardens, Motors and Pumps, Furniture, Plumbing Products, Others), By Region, Competition, Forecast, and Opportunities, 2019-2029F

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Report description:

United States Industrial Fasteners Market was valued at USD 16.70 billion in 2023 and is anticipated to project steady growth in the forecast period with a CAGR of 3.01% through 2029.

The United States Industrial Fasteners market is a dynamic and essential component of the country's manufacturing and construction sectors. Industrial fasteners, such as screws, bolts, nuts, and rivets, play a crucial role in holding together various components in machinery, equipment, structures, and products. The United States Industrial Fasteners market is substantial, reflecting the country's diverse manufacturing and construction industries. The market has experienced steady growth over the years, with a strong emphasis on innovation, quality, and safety standards.

Key Market Drivers

Economic Expansion and Infrastructure Development

Economic expansion, marked by rising GDP, increased consumer spending, and business investment, contributes significantly to the demand for industrial fasteners. During periods of economic growth, the construction industry experiences a surge in activity. This includes new residential, commercial, and industrial construction projects. All of these projects require an extensive range of fasteners for securing structural components, plumbing, electrical systems, and more. Government and private sector

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investments in infrastructure development, such as roads, bridges, and public facilities, require vast quantities of industrial fasteners for construction and maintenance. Large-scale projects, such as building new airports, updating public transportation systems, and expanding utility networks, have a substantial impact on the demand for fasteners. Growing industries, including manufacturing and energy production, also benefit from economic growth. These sectors utilize fasteners for machinery assembly and maintenance, including in sectors like energy generation, which have specific needs for fasteners in the construction of wind turbines, solar panels, and other infrastructure.

Economic expansion often correlates with increased housing market activity. The real estate sector relies heavily on industrial fasteners for residential and commercial building projects. As more homes are built, the demand for fasteners for framing, plumbing, electrical work, and interior finishes increases. Expanding businesses and the need for additional office space lead to more commercial construction projects, all of which require fasteners for structural and interior applications.

Economic growth is linked to higher demand for transportation services. The automotive industry experiences a surge in demand during economic expansions, driving the need for fasteners for vehicle assembly. Furthermore, the growth of electric and autonomous vehicles introduces new fastener requirements. Growth in trade and e-commerce during economic expansions has implications for the transportation and logistics industry. Infrastructure like warehouses, distribution centers, and ports all require fasteners for construction and maintenance. Government plays a pivotal role in stimulating infrastructure development.

Legislative initiatives and funding allocation can have a profound impact on the industrial fasteners market. Government infrastructure bills, such as the American Jobs Plan, allocate substantial funds to revamp aging infrastructure. Such government-backed projects involve the construction of roads, bridges, airports, and public utilities, leading to a substantial demand for industrial fasteners. Government entities are responsible for maintaining and repairing public infrastructure. Aging infrastructure necessitates ongoing replacement of fasteners, further driving demand.

Automotive Industry Growth

The growth of the automotive industry is a significant driver for the United States Industrial Fasteners market. The automotive sector's expansion creates a substantial demand for industrial fasteners. A core driver of the fasteners market is the production of vehicles. As the automotive industry expands, more cars, trucks, and commercial vehicles are manufactured. Each vehicle relies on a multitude of fasteners for assembly, including bolts, nuts, screws, and rivets. The automotive industry is experiencing a technological revolution. Electric vehicles (EVs), autonomous vehicles, and vehicles with advanced safety features are becoming increasingly common. These innovations often require unique or specialized fasteners. For instance, EVs need fasteners designed for lightweight materials, while autonomous vehicles may have specific fastening needs related to sensors and cameras. In 2023, total full-year sales reached 15,608,386 units, reflecting a notable increase of 12.3% compared to the previous year's totals. Truck and SUV sales experienced robust growth, surging by 13.4% to reach 12,380,961 units, indicating strong demand in this segment. Similarly, passenger car sales also saw a significant uptick, rising by 8.1% to reach 3,227,425 units for the year. The increase in overall sales can be attributed to several factors, including economic recovery, consumer confidence, and new product launches driving consumer interest. Additionally, favorable financing options and incentives may have contributed to the rise in sales across both the truck/SUV and passenger car segments. Overall, the automotive industry witnessed positive momentum in 2023, with sales figures reflecting sustained growth and resilience in the market.

Automotive manufacturers constantly seek ways to enhance efficiency and reduce production costs. This drive for efficiency has led to advancements in automotive assembly processes, such as robotic automation and lean manufacturing. Fasteners play a crucial role in these processes, as they need to be precisely engineered and easily integrated into automated systems. The automotive aftermarket is another key driver for the industrial fasteners market. As vehicles age or are involved in accidents, replacement parts and fasteners become essential for repairs and maintenance. This includes everything from engine repairs to bodywork. Fuel efficiency and environmental concerns have prompted automakers to focus on light weighting, which involves reducing the weight of vehicles. Lighter vehicles consume less fuel and produce fewer emissions. To achieve this, automotive manufacturers are turning to materials like aluminum and composites, which often require specialized fasteners. Additionally, light weighting can lead to innovative fastener solutions to secure these materials effectively.

Manufacturing Sector Advancements

The advancements in the manufacturing sector play a pivotal role in driving the growth of the United States Industrial Fasteners market. The manufacturing industry's evolution is intrinsically linked to the demand for industrial fasteners. The adoption of

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advanced manufacturing technologies, such as 3D printing, CNC machining, and automation, has transformed the production processes in the manufacturing sector. These innovations have led to a growing need for specialized fasteners to work seamlessly with these modern techniques. For example, 3D printing may require custom fasteners to secure printed components, while automated assembly lines require precision-engineered fasteners to maintain efficiency.

The concept of lean manufacturing emphasizes waste reduction and efficiency. As manufacturers strive for leaner and more cost-effective operations, they require fasteners that can be easily integrated into their production lines. Fasteners need to be reliable, quick to install, and capable of withstanding high levels of stress. Consequently, manufacturers seek innovative fastener solutions to streamline their processes. The manufacturing sector continually explores new materials, such as composites, lightweight alloys, and high-performance plastics, to enhance product performance and reduce weight. These materials often demand customized fasteners capable of securing them effectively. The development of specialized fasteners to accommodate these materials represents a growth opportunity for the fastener market.

The demand for precision engineering in manufacturing is rising, particularly in sectors like aerospace and medical devices. Manufacturers require fasteners that provide high levels of accuracy and repeatability. Customized fasteners designed for specific applications in these industries are essential to ensure product quality and safety. The aerospace and defense sectors are known for their stringent requirements when it comes to fasteners. These industries demand fasteners that can withstand extreme conditions, including temperature fluctuations and high stress. With advancements in aerospace technology and defense equipment, the need for specialized fasteners continues to grow.

Maintenance, Repair, and Operations (MRO)

Maintenance, Repair, and Operations (MRO) activities are a crucial driver for the United States Industrial Fasteners market. MRO refers to the processes and tasks that are essential for maintaining, repairing, and ensuring the smooth operation of machinery, equipment, and infrastructure. As existing infrastructure and industrial equipment age, they require regular maintenance and repairs. Fasteners are essential components for securing and connecting various parts of machinery and infrastructure. Whether it's a bridge, a manufacturing plant, or a power generation facility, these structures and equipment rely on fasteners to remain operational.

The need for replacement parts in MRO is substantial. Over time, fasteners may corrode, degrade, or fail due to wear and tear. When these fasteners need replacement, the MRO segment turns to fastener suppliers to source compatible and reliable components to ensure the continued operation of machinery and infrastructure. The MRO sector encompasses a wide range of industries, including manufacturing, construction, energy, and transportation. Each of these sectors relies on fasteners for maintenance and repair, and each may have unique requirements based on the specific equipment or infrastructure being serviced.

Unplanned breakdowns and emergency repairs can occur in various industries. In such situations, quick access to a variety of fasteners is essential to resolve issues promptly and minimize downtime. Suppliers that can provide fast delivery of the necessary fasteners play a crucial role in these scenarios. In many cases, legacy equipment may still be in operation, and sourcing fasteners for these older systems can be challenging. Fastener manufacturers and suppliers often produce custom fasteners to fit the unique specifications of legacy equipment, ensuring that they remain serviceable. Regulatory bodies often set standards and regulations for equipment safety and performance. Manufacturers and operators need to ensure that their machinery and infrastructure meet these standards. Fasteners that are compliant with regulations are essential for MRO work.

Key Market Challenges

Global Economic Uncertainties

The global economic landscape can significantly impact the industrial fasteners market in the United States. Challenges such as trade disputes, tariffs, and economic downturns in key trading partners can disrupt the import and export of fasteners. Fluctuations in currency exchange rates also affect the cost of imported fasteners. These uncertainties can lead to increased production costs and reduced profit margins for manufacturers and suppliers in the United States.

The COVID-19 pandemic serves as a recent example of how economic uncertainties can impact the market. Supply chain disruptions, labor shortages, and shifts in consumer demand due to the pandemic affected production and demand for industrial fasteners. Geopolitical factors, such as international trade agreements and sanctions, can also pose challenges. Changes in trade policies may impact the sourcing of raw materials and components, leading to price volatility and supply chain disruptions.

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Environmental Regulations and Sustainability

Increasing awareness of environmental concerns and the drive towards sustainability has prompted the manufacturing industry to seek more eco-friendly materials and processes. This can pose challenges for the industrial fasteners market in the United States. Regulations limiting the use of certain materials, such as lead and certain coatings, in fasteners can require costly changes to manufacturing processes and materials sourcing. End-of-life considerations are becoming increasingly important. Fasteners used in applications that require easy disassembly and recycling must be designed with this in mind. Developing and implementing sustainable fastener solutions can be challenging for manufacturers. Fasteners play a role in creating energy-efficient products and structures. Meeting stringent energy efficiency standards can demand innovative and often more expensive fastener solutions.

Competition and Pricing Pressure

The industrial fasteners market is highly competitive, with numerous manufacturers and suppliers in the United States and globally. In an attempt to gain market share, some manufacturers may engage in price wars, leading to lower prices for fasteners. This can affect profit margins for companies. The United States faces competition from international suppliers that can provide lower-cost alternatives. These competitors can benefit from lower labor and production costs in their respective regions. The market has witnessed consolidation as larger companies acquire smaller ones. Smaller manufacturers may struggle to compete with larger, more diversified competitors in terms of pricing and resources.

Rising raw material costs, such as steel, aluminum, and specialty coatings, can also put pressure on fastener prices, making it challenging for companies to maintain competitive pricing while ensuring profitability. Manufacturers that focus on delivering value through innovation and quality may be better positioned to compete in a price-sensitive environment.

Key Market Trends

Technological Advancements and Innovation

With the rise of Industry 4.0 and the Internet of Things (IoT), there's a growing trend toward "smart" fastener. These fasteners are embedded with sensors and data collection capabilities. They can monitor factors like tension, temperature, and torque, providing real-time data for predictive maintenance. Industries such as aerospace, automotive, and manufacturing are increasingly adopting smart fasteners to enhance equipment reliability and safety.

The development of advanced materials, such as high-strength alloys, composites, and lightweight materials, has a profound impact on the industrial fasteners market. These materials require specialized fasteners that can withstand extreme conditions, offer high strength-to-weight ratios, and resist corrosion. Fastener manufacturers are continually innovating to create products that meet these requirements, enabling industries like aerospace and automotive to reduce weight while maintaining structural integrity. The adoption of 3D printing and additive manufacturing technologies is revolutionizing the production of customized and complex fasteners. Manufacturers can create intricate and specialized fasteners on demand, reducing lead times and costs. This trend is particularly important in industries that require unique or low-volume fasteners, such as aerospace and medical devices.

Sustainability and Environmental Responsibility

Increasing emphasis on sustainability and environmental responsibility is leading to the development of eco-friendly fasteners. This includes fasteners designed for easy disassembly and recycling, as well as those made from recycled or recyclable materials. These products align with the growing demand for environmentally conscious practices in construction, manufacturing, and infrastructure projects.

The push for energy efficiency has made energy-saving fasteners a significant trend. These fasteners are designed to reduce heat transfer, improve insulation, and enhance overall energy performance. Industries that focus on energy efficiency, such as construction and HVAC, are increasingly incorporating these fasteners into their projects. Fastener manufacturers are working to meet evolving regulatory requirements related to material composition and environmental impact. Compliance with regulations, such as REACH (Registration, Evaluation, Authorization, and Restriction of Chemicals) and RoHS (Restriction of Hazardous Substances), is crucial. Adhering to these standards ensures that fasteners can be safely used in a range of applications.

Customization and Specialization

Specialized Fasteners for Critical Applications: Industries like aerospace, defense, and medical devices require fasteners with specific characteristics, such as precision, strength, and corrosion resistance. As a result, manufacturers are producing highly specialized fasteners to meet the exacting requirements of these sectors. As older equipment remains in operation, the need for

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custom fasteners designed to fit the unique specifications of legacy machinery becomes essential. Fastener manufacturers are offering tailored solutions for these specific applications, helping industries maintain and extend the life of their equipment. Supply Chain Integration: Increasingly, fastener suppliers are collaborating with their customers to create customized fastener solutions, enhancing supply chain integration. This partnership approach allows for better alignment with customer needs and ensures that fasteners are designed to meet precise specifications.

Segmental Insights

Product Insight

Based on Product, the Externally Threaded segment emerged as the dominant segment in the United States market for Industrial Fasteners in 2023. Externally threaded fasteners encompass a broad range of products, including screws, bolts, and studs. These fasteners are versatile and can be employed in a wide array of applications across various industries. Their external threading allows them to be easily inserted into pre-drilled or pre-tapped holes, making them suitable for different materials and structures. The externally threaded segment offers a diverse portfolio of fasteners, each with specific features and applications. This includes machine screws, wood screws, self-tapping screws, and a wide variety of bolts with different head types and materials. This range allows fastener manufacturers to address the specific needs of different industries and applications. Externally threaded fasteners are relatively easy to install, which reduces labor costs and the need for specialized equipment. The simplicity of their design, with threads on the outside, makes them accessible for a wide range of users, from construction workers to DIY enthusiasts. Externally threaded fasteners are often cost-effective solutions due to their mass production capabilities. They can be produced in large quantities, making them affordable for bulk purchasing, which benefits industries that require a high volume of fasteners. Externally threaded fasteners are subject to industry standards and regulations, ensuring their quality and safety. Compliance with these standards is essential for industries such as construction, automotive, and manufacturing, which rely on fasteners to meet stringent safety and performance requirements. These factors are expected to drive the growth of this segment.

Regional Insights

Midwest emerged as the dominant region in the United States Industrial Fasteners market in 2023, holding the largest market share in terms of both value and volume. The Midwest, often referred to as the "Rust Belt," is a traditional manufacturing hub in the United States. The region hosts a dense concentration of automotive, aerospace, machinery, and construction industries. These sectors are major consumers of industrial fasteners, leading to substantial demand in the Midwest. The Midwest's central location and extensive transportation infrastructure, including railways, highways, and ports, facilitate the distribution of fasteners to manufacturers across the United States. This transportation advantage bolsters the region's dominance. The Midwest has witnessed consistent economic activity, with many companies headquartered in the region or operating manufacturing facilities there. This economic stability contributes to the sustained demand for industrial fasteners. A well-established supply chain, with numerous fastener manufacturers and suppliers in the Midwest, ensures the availability of a wide variety of fasteners to cater to diverse industries.

The Southeast market is poised to be the fastest-growing market, offering lucrative growth opportunities for Industrial Fasteners players during the forecast period. Factors such as The Southeastern United States has emerged as a hotspot for the automotive industry. Several major automotive manufacturers and suppliers have established operations in states like Alabama, Georgia, South Carolina, and Tennessee. This boom in automotive manufacturing fuels the demand for industrial fasteners. The Southeast is also witnessing significant growth in the aerospace and defense sectors. With the presence of key companies and military installations, there is an increased requirement for high-performance fasteners in these industries.

The region experiences ongoing construction and infrastructure development, driven by population growth and urbanization. Major cities like Atlanta, Miami, and Charlotte are experiencing substantial construction projects, leading to a heightened demand for fasteners in the building and construction sector. The Southeast is geographically close to major ports along the Atlantic coast, enhancing the region's connectivity for importing and exporting fasteners. This proximity to ports enables efficient global trade and distribution. Investments by state governments and private enterprises have been made to attract and retain manufacturing and industrial companies. These investments boost the overall economic activity in the region, further contributing to the growth of the industrial fasteners market.

Key Market Players

□ Arconic Fastening Systems and Rings Inc

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- ☐ Hilti Corporation
- ☐ Illinois Tool Works, Inc.
- ☐ Acument Global Technologies, Inc.
- ☐ ATF, Inc.
- ☐ MW Industries, Inc.
- ☐ Birmingham Fastener and Supply, Inc.
- ☐ SESCO Industries, Inc.
- ☐ Elgin Fastener Group LLC
- ☐ Slidematic Inc

Report Scope:

In this report, the United States Industrial Fasteners Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

☐ United States Industrial Fasteners Market, By Raw Material:

- o Metal
- o Plastic

☐ United States Industrial Fasteners Market, By Product:

- o Externally Threaded Fasteners
- o Internally Threaded Fasteners
- o Non-threaded Fasteners
- o Aerospace Grade Fasteners

☐ United States Industrial Fasteners Market, By Application:

- o Automotive
- o Aerospace
- o Building and construction
- o Industrial Machinery
- o Home appliances
- o Lawns and Gardens
- o Motors and Pumps
- o Furniture
- o Plumbing Products
- o Others

☐ United States Industrial Fasteners Market, By Region:

- o Northeast
- o South
- o West
- o Midwest

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the United States Industrial Fasteners Market.

Available Customizations:

United States Industrial Fasteners market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

- ☐ Detailed analysis and profiling of additional market players (up to five).

Table of Contents:

1. Product Overview
 - 1.1. Market Definition

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- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations
2. Research Methodology
 - 2.1. Objective of the Study
 - 2.2. Baseline Methodology
 - 2.3. Key Industry Partners
 - 2.4. Major Association and Secondary Sources
 - 2.5. Forecasting Methodology
 - 2.6. Data Triangulation & Validation
 - 2.7. Assumptions and Limitations
3. Executive Summary
 - 3.1. Overview of the Market
 - 3.2. Overview of Key Market Segmentations
 - 3.3. Overview of Key Market Players
 - 3.4. Overview of Key Regions/Countries
 - 3.5. Overview of Market Drivers, Challenges, Trends
4. Voice of Customer
5. United States Industrial Fasteners Market Outlook
 - 5.1. Market Size & Forecast
 - 5.1.1. By Value
 - 5.2. Market Share & Forecast
 - 5.2.1. By Raw Material (Metal, Plastic)
 - 5.2.2. By Product (Externally Threaded Fasteners, Internally Threaded Fasteners, Non-threaded Fasteners, Aerospace Grade Fasteners)
 - 5.2.3. By Application (Automotive, Aerospace, Building and construction, Industrial Machinery, Home appliances, Lawns and Gardens, Motors and Pumps, Furniture, Plumbing Products, Others)
 - 5.2.4. By Region
 - 5.2.5. By Company (2023)
 - 5.3. Market Map
 - 5.3.1. By Raw Material
 - 5.3.2. By Product
 - 5.3.3. By Application
 - 5.3.4. By Region
6. Northeast Industrial Fasteners Market Outlook
 - 6.1. Market Size & Forecast
 - 6.1.1. By Value
 - 6.2. Market Share & Forecast
 - 6.2.1. By Raw Material
 - 6.2.2. By Product
 - 6.2.3. By Application
7. South Industrial Fasteners Market Outlook
 - 7.1. Market Size & Forecast
 - 7.1.1. By Value
 - 7.2. Market Share & Forecast
 - 7.2.1. By Raw Material

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- 7.2.2. By Product
- 7.2.3. By Application
- 8. West Industrial Fasteners Market Outlook
 - 8.1. Market Size & Forecast
 - 8.1.1. By Value
 - 8.2. Market Share & Forecast
 - 8.2.1. By Raw Material
 - 8.2.2. By Product
 - 8.2.3. By Application
- 9. Mid-West Industrial Fasteners Market Outlook
 - 9.1. Market Size & Forecast
 - 9.1.1. By Value
 - 9.2. Market Share & Forecast
 - 9.2.1. By Raw Material
 - 9.2.2. By Product
 - 9.2.3. By Application
- 10. Market Dynamics
 - 10.1. Drivers
 - 10.2. Challenges
- 11. Market Trends & Developments
 - 11.1. Recent Developments
 - 11.2. Product Launches
 - 11.3. Mergers & Acquisitions
- 12. United States Industrial Fasteners Market: SWOT Analysis
- 13. Porter's Five Forces Analysis
 - 13.1. Competition in the Industry
 - 13.2. Potential of New Entrants
 - 13.3. Power of Suppliers
 - 13.4. Power of Customers
 - 13.5. Threat of Substitute Product
- 14. Competitive Landscape
 - 14.1. Arconic Fastening Systems and Rings Inc
 - 14.1.1. Business Overview
 - 14.1.2. Company Snapshot
 - 14.1.3. Products & Services
 - 14.1.4. Financials (In case of listed)
 - 14.1.5. Recent Developments
 - 14.1.6. SWOT Analysis
 - 14.2. Hilti Corporation
 - 14.3. Illinois Tool Works, Inc.
 - 14.4. Acument Global Technologies, Inc.
 - 14.5. ATF, Inc.
 - 14.6. MW Industries, Inc.
 - 14.7. Birmingham Fastener and Supply, Inc.
 - 14.8. SESCO Industries, Inc.
 - 14.9. Elgin Fastener Group LLC
 - 14.10. Slidematic Inc

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- 15. Strategic Recommendations
- 16. About Us & Disclaimer

United States Industrial Fasteners Market By Raw Material (Metal, Plastic), By Product (Externally Threaded Fasteners, Internally Threaded Fasteners, Non-threaded Fasteners, Aerospace Grade Fasteners), By Application (Automotive, Aerospace, Building and construction, Industrial Machinery, Home appliances, Lawns and Gardens, Motors and Pumps, Furniture, Plumbing Products, Others), By Region, Competition, Forecast, and Opportunities, 2019-2029F

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