

## **Power Tool Accessories Market - Global Outlook & Forecast 2024-2029**

Market Report | 2024-12-10 | 506 pages | Arizton Advisory & Intelligence

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### **Report description:**

The global power tool accessories market is expected to grow at a CAGR of 6.87% from 2023 to 2029.

### **MARKET TRENDS & DRIVERS**

#### **Growing Prominence of Asian Manufacturing**

Since the first industrial revolution in the late 18th century, the U.S. and a few European countries have dominated the manufacturing sector. These countries have held immense control over key resources and were better poised to foster industrial development and drive innovation through advances in production technologies, materials, and end-user solutions. However, these countries have faced the challenge of high demand and competitiveness for some time. Also, the demographic dividend and market maturity have put them at a disadvantage over fledgling economies with cheaper resources and considerably large end-user markets. These countries require a technological leap in terms of manufacturing. Several trends have shown that countries adopting structural shifts from low-technology to high-technology manufacturing have significantly increased their per capita GDP over the past few decades. Japan and South Korea are a few prominent examples in this regard. In these economies, low-tech industries dominate low-income levels and offer large-scale employment. High-tech industries offer productivity gains advocated mainly by government and institutional reforms to escape the middle-income trap, which can substantially drive the demand for machine tools and power tools accessories in the coming years.

#### **Growing Adoption of Power Tools and Accessories**

The adoption of power tools and accessories has rapidly increased across various industries due to their ability to enhance productivity, precision, and efficiency and support the growth of the power tool accessories market. Power tools offer several advantages over traditional hand tools, including increased speed, precision, and efficiency. They can also help reduce operator fatigue, increase productivity, and improve work quality. The popularity of power tools has grown significantly in recent years as manufacturers have introduced new models with improved features and functionality. Consumers are also increasingly interested

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in DIY projects, home renovation, and woodworking, further boosting demand for power tools.

### Rise in Residential Improvement & DIY Projects

Most adults indulge in creative and purposeful leisure activities in some developed North American and European economies. Some consumers also invest in home improvement and maintenance activities based on their interests. This concept is gaining momentum in developing economies such as India, Brazil, and South Africa. Consumers in the residential sector often undertake repair and enhancement activities that improve their skills and prove cost-efficient. Furthermore, hypermarkets, supermarkets, and other specialty stores such as Home Depot offer more DIY products and drive the market for DIY tools, eventually increasing the power tool accessories market. Also, manufacturers are creating electric hammers with user-friendly features that attract DIY users, including lightweight designs, variable speed control, and easy-to-change drill bits. The growth of DIY activities is estimated to propel the growth of the cordless power tool accessories market. Cordless models provide greater convenience and portability, which makes them suitable for DIY users who may not have readily available power outlets in their work areas. The market provides DIY users with an extensive range of cordless electric hammers with varying feature sets and power outputs. This enables DIY users to select a model that fits their project requirements and budget.

## SEGMENTATION INSIGHTS

### INSIGHTS BY ACCESSORY TYPE

The global power tool accessories market by accessory type is segmented into drill bits, circular saw blades, batteries, screwdriver bits, reciprocating saw blades, jig saw blades, band saw blades, abrasive wheels, router bits, and others. Based on accessory type, the drill bits segment accounted for the largest revenue share in the market. The volume of work carried out by corded and battery-operated drills has made them highly preferred tools among DIY enthusiasts, requiring frequent replacements due to the high workload intensity. Circular saw blades were the second-dominant segment as these tools are mostly used for wooden and metalwork that require precision cutting. Also, these tools are used in DIY activities, and therefore, most vendors offer user-friendly cutting tools for home improvement and wood-crafting activities.

Furthermore, the rising market share of drill bits is attributed to the increasing demand across construction, manufacturing, and maintenance sectors, fueled by infrastructure development, technological advancements, home improvement trends, and the expansion of renewable energy projects. As these trends continue, drill bit manufacturers are poised to capitalize on the growing opportunities in the market. Also, the type of power tool accessories highly depends on the power tool and the nature of the work. For instance, light tools such as drills, drivers, and wrenches are used for personal and professional purposes, which require frequent replacements of bits and batteries. Similarly, blades are crucial for wood and metalworking and require frequent changes in power tools such as circular saws, reciprocating saws, band saws, and jigsaws.

#### Segmentation by Accessory Type

- Drill Bits
- Circular Saw Blades
- Batteries
- Screwdriver Bits
- Reciprocating Saw Blades
- Jig Saw Blades
- Band Saw Blades
- Abrasive Wheels
- Router Bits
- Others

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## INSIGHTS BY DISTRIBUTION CHANNEL

The offline segment is expected to be the largest revenue segment of the global power tool accessories market. The offline distribution segment holds the major power tool accessories market share due to the high customer preference for comprehending the functionalities and usage of products before making the final purchase. Moreover, since power tool accessories involve high costs, the preference for offline channels remains high to minimize the risk of receiving damaged products. Although the trend of selling these devices online is increasing, a significant share of power tool accessories distribution occurs through specialty stores. The power tool accessories producers harness specialty stores and supermarkets due to their personalized customer services.

### Segmentation by Distribution Channel

- Offline
- Online

## INSIGHTS BY OPERATION TYPE

The global power tool accessories market by operation type is segmented into cutting, drilling, fastening, routing and planning, and others. The cutting segment holds the most significant global market share in 2023. Various industries have unique cutting needs, from construction and manufacturing to automotive and aerospace. Each industry requires specific cutting tools and accessories tailored to its applications. For example, construction may require masonry drill bits and abrasive wheels, while manufacturing may need carbide-tipped saw blades and precision cutting discs. The diverse demands from these industries propel the development and availability of various cutting operation types in the market.

### Segmentation by Operation Type

- Cutting
- Drilling
- Fastening
- Routing And Planning
- Others

## INSIGHTS BY END USER

The global power tool accessories market by end-user is segmented into industrial, commercial, and residential. The industrial segment held the largest share of the global power tool accessories market, and the scenario is expected to remain consistent throughout the forecast period due to the rise in demand for sophisticated tools and precision manufacturing. However, renovations, retrofits, and DIY activities are expected to drive the demand for power tool accessories in the residential and commercial segments. The residential end-user segment is expected to grow significantly due to the rise in new construction projects for homes and buildings. These power tools are used in renovation and retrofitting activities, as well as drills, demolition tools, and cutting equipment. A major trend that has led to significant demand for power tools is the growth in DIY activities. Equipment, suitable tools, and semi-finished materials are often used in DIY projects without the assistance of professionals.

### Segmentation by End User

- Industrial
- Commercial
- Residential

## INSIGHTS BY INDUSTRIAL

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The global power tool accessories market by industrial is segmented into energy, construction, aerospace, automotive, electronics, shipbuilding, and others. The energy segment holds the most significant share of the industrial market. Renewable energy sources rely on fastening solutions for productivity every day. Most wind energy technicians prefer power tools, especially cordless tools, to maximize mobility while working at heights. The requirement of a mandatory power source for corded tools also adds to the growth and demand for cordless segments. Furthermore, the solar energy industry is experiencing high growth, requiring drilling tools for solar panel assembly operations. Stanley Black & Decker is a significant vendor specializing in product offerings for the segment. Also, factors such as the extensive use of drillers and fastening tools with bits and batteries for assembly activities will contribute to the growth of the automotive segment. Also, automotive market players rely extensively on heat guns, glue guns, and cutting tools during their manufacturing operations, accelerating the demand for power tool accessories even further in the coming years.

#### Segmentation by Industrial

- Energy
- Construction
- Aerospace
- Automotive
- Electronics
- Shipbuilding
- Others

#### Segmentation by Commercial

#### Segmentation by Residential

### GEOGRAPHICAL ANALYSIS

APAC held the largest global power tool accessories market share, valued at over USD 5 billion in 2023. The market is rapidly driven by urbanization, increasing disposable income, and a growing middle class. The region is highly diverse, with countries exhibiting varying technological advances and consumer preferences. Robust economic growth in APAC economies like China, India, Japan, South Korea, and Southeast Asia drives investments in infrastructure development, commercial real estate, and urbanization endeavors. This surge fuels demand for Power Tool Accessories solutions across various sectors, such as offices, retail spaces, hospitality, and healthcare.

North America holds a significant position in the global power tool accessories market and is expected to maintain its position during the forecast period, with the U.S. contributing to the highest revenue share as it is the largest economy in the region. The region is home to many recognized players and has a high level of technological improvement. The market is driven by consumer demand for advanced products and services, and there is a substantial investment in R&D to support this demand. Furthermore, the European market for power tool accessories is similar to North America's maturity and high-tech innovation. The region has a highly competitive market, with many established players competing for market share. The market is also highly regulated, with rigorous product safety and quality standards.

#### Segmentation by Geography

- APAC
  - o□China
  - o□Japan
  - o□India
  - o□Australia
  - o□South Korea
  - o□Indonesia
  - o□Malaysia

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- o Rest of APAC
- Europe
  - o Germany
  - o France
  - o Russia
  - o UK
  - o Norway
  - o Denmark
  - o Italy
  - o Poland
  - o Spain
- o Rest of Europe
- North America
  - o US
  - o Canada
- Latin America
  - o Brazil
  - o Mexico
  - o Argentina
  - o Rest of Latin America
- Middle East & Africa
  - o Saudi Arabia
  - o UAE
  - o Saudi Africa
  - o Rest of MEA

## COMPETITIVE LANDSCAPE

The global power tool accessories market is moderately fragmented and is dominated by vendors such as Stanley Black & Decker, Bosch, and TTI. These major vendors have a global presence in the three major regions of North America, APAC, and Europe. The market competition is expected to intensify further with increased product extensions, technological innovation growth, and mergers and acquisitions. Furthermore, the key players in the global power tool accessories market include Stanley Black & Decker, Bosch, Techtronic Industries (TTI), Makita, Hilti, Apex Tool Group, Snap-on Incorporated, Koki Holdings, Fortive, and Positec. Also, vendors manufacture power tool accessories with innovative product specifications to capture consumer interest and improve user convenience. Users expect power tool accessories to be more lightweight and compact yet powerful, with a wide range of customizations. Global brands are introducing features, such as longer operation duration. Thus, global and domestic leaders' constant incorporation of technological innovations in products is expected to intensify the competition among manufacturers. Also, with the growth in DIY culture and the demand for more user-friendly tools, vendors are customizing their tools for home improvement activities. Consequently, electric hammers from TTI and Stanley are being designed for DIY enthusiasts. They are more compact, lightweight, and affordable that support multiple activities. Hence, vendors can afford more power tools with rechargeable batteries under the DIY product ranges, which are expected to be in the limelight throughout the forecast period.

### Key Company Profiles

- Stanley Black & Decker
- Bosch
- Techtronic Industries (TTI)

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- Makita
- Hilti
- Apex Tool Group
- Snap-on Incorporated
- Koki Holdings
- Fortive
- Positec

#### Other Prominent Vendors

- Chervon
- Fein
- FERM
- AIMCO
- Festool
- CS Unitec
- Dynabrade
- Husqvarna
- Stihl
- Blount
- KYOCERA
- INTERSKOL
- Panasonic
- URYU SEISAKU
- Atlas Copco
- Ingersoll Rand
- Emerson
- Ridgid
- Skil
- Metabo
- Craftsman
- Porter-Cable
- IRWIN TOOLS
- Diablo Tools
- Kobalt
- Dremel
- Proxxon
- Parkside
- Chicago Pneumatic
- Matco Tools
- Cornwell Quality Tools
- Senco
- Paslode
- Worx

#### KEY QUESTIONS ANSWERED:

1. How big is the global power tool accessories market?

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2. Which region dominates the global power tool accessories market share?
3. What is the growth rate of the global power tool accessories market?
4. What are the significant trends in the power tool accessories industry?
5. Who are the key players in the global power tool accessories market?

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