

Rethinking Fastener Sourcing Beyond China

PROCUREMENT

U.S. and EU Trade in a New Era of Diversification



Data note: The data for this article is derived from the US Census trade statistics. US Census trade statistics analyze imports and exports on all modes of transportation. That value is calculated in USD by general FOB for imports and FOB for exports. Fasteners in this article are defined as any product under HS Code 7318 (screws, bolts, nuts, coach screws, screw hooks, rivets, cotter pins, washers and similar articles, or iron or steel). The volume in terms of mass is recorded in Gross Weight (KG).

For decades, China has been the epicenter of global fastener manufacturing, offering competitive pricing, massive scale, and a deeply entrenched industrial base. However, the landscape in 2025 is far more volatile. U.S. companies are navigating a complex mix of rising tariffs, shifting trade policies, and unpredictable geopolitical tensions. The first five months of 2025 alone has seen abrupt changes in U.S.-China tariff enforcement, with new duties proposed, postponed, and reimposed—leaving importers in a state of strategic limbo.

This uncertainty, combined with the lingering effects of global supply chain disruptions and a growing emphasis on national security, has pushed many businesses to reconsider their sourcing models. It's no longer just about finding the lowest-cost supplier. Resilience, flexibility, and long-term risk mitigation are now at the forefront of decision-making. As a result, American fastener importers and manufacturers are exploring reshoring initiatives, leveraging EU trade partnerships, and embracing multi-country sourcing strategies to safeguard their operations in an increasingly unpredictable world.





Tariffs and Trade Barriers

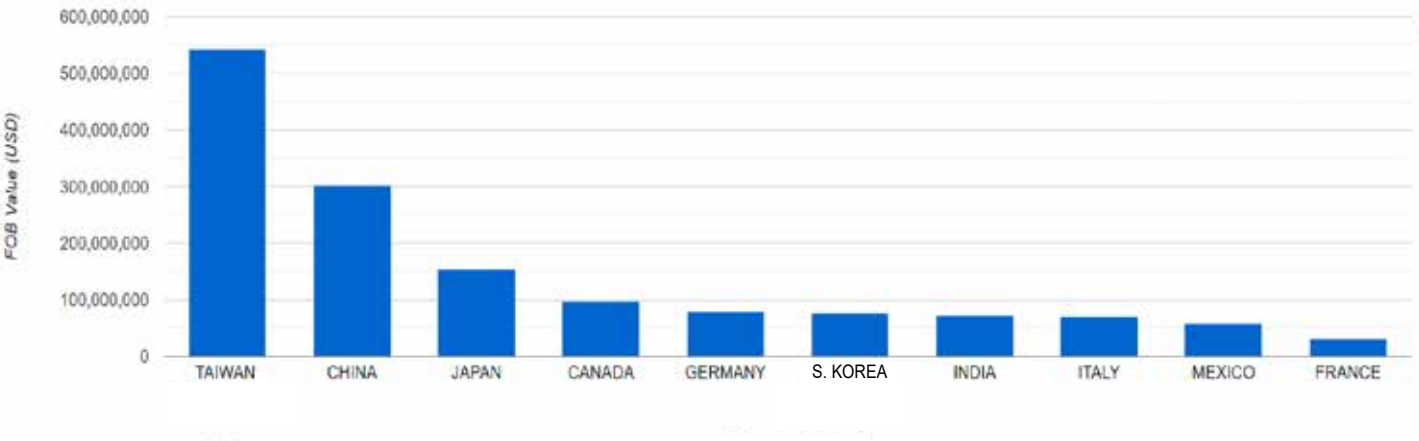
Trade tensions reached a peak in the first quarter of 2025 following the imposition of new U.S. duties, prompting significant shifts in fastener sourcing patterns. Notably, U.S. imports of fasteners from top suppliers—Taiwan and China—increased compared to the same period in 2024, likely reflecting a surge in shipments as importers rushed to bring in goods ahead of the tariff hikes. At the same time, there were clear signs of supply chain diversification. **U.S. buyers expanded sourcing from alternative markets, with fastener imports from India rising by 42% in USD value, followed by a 29% increase from Mexico and a 7% uptick from South Korea. Conversely, imports from key EU partners declined,** with shipments from Germany dropping by 21% and those from France decreasing by nearly 7%. These shifts suggest that while importers were front-loading from traditional sources, they were also actively repositioning their strategies to reduce overreliance on any single region amid growing trade and geopolitical uncertainty.

U.S. Fastener Imports in Q1 2025 (By Country)

HS Code : 7318 - SCREWS, BOLTS, NUTS, COACH SCREWS, SCREW HOOKS, RIVETS, COTTERS, COTTER PINS, WASHERS AND SIMILAR ARTICLES OF IRON OR STEEL

Country of Origin	2024 - Q1				2025 - Q1				Volume Change			
	FOB Value (USD)	%	Gross Weight (Kg.)	%	FOB Value (USD)	%	Gross Weight (Kg.)	%	FOB Value (USD)	%	Gross Weight (Kg.)	%
TAIWAN	543,693,776	32.88	150,484,605	36.20	544,456,902	32.51	160,143,239	35.69	763,126	0.14	9,658,634	6.42
CHINA	296,355,314	17.93	142,922,885	34.38	302,269,976	18.05	155,032,976	34.55	5,914,662	2.00	12,110,091	6.47
JAPAN	157,713,400	9.54	31,742,754	7.64	153,409,667	9.16	35,236,237	7.86	(4,303,733)	-2.73	3,493,483	11.01
CANADA	105,523,311	6.39	70,796	0.02	96,998,230	5.80	75,854	0.02	(8,525,081)	-8.08	5,058	7.14
GERMANY	101,573,712	6.15	10,071,740	2.43	79,897,690	4.78	8,289,874	1.85	(21,676,022)	-21.34	(1,781,866)	-17.69
S. KOREA	70,180,312	4.25	14,829,145	3.57	75,090,819	4.49	14,000,676	3.12	4,910,507	7.00	(828,469)	-5.59
INDIA	50,205,653	3.04	22,442,089	5.40	71,421,785	4.27	29,365,389	6.55	21,216,132	42.26	6,923,300	30.85
ITALY	66,308,530	4.01	4,510,985	1.09	69,586,143	4.16	4,367,413	0.98	3,277,613	4.94	(143,572)	-3.18
MEXICO	45,572,393	2.76	38,475	0.01	58,911,056	3.52	19,221	0.01	13,338,663	29.37	(19,254)	-50.04
FRANCE	33,414,363	2.03	1,644,469	0.40	31,130,376	1.86	1,380,537	0.31	(2,283,987)	-6.84	(263,932)	-16.05
Total	1,653,718,099	100	415,719,625	100	1,674,905,817	100	448,756,374	100	21,187,718	1.29	33,036,749	7.95

Top Countries of Origin



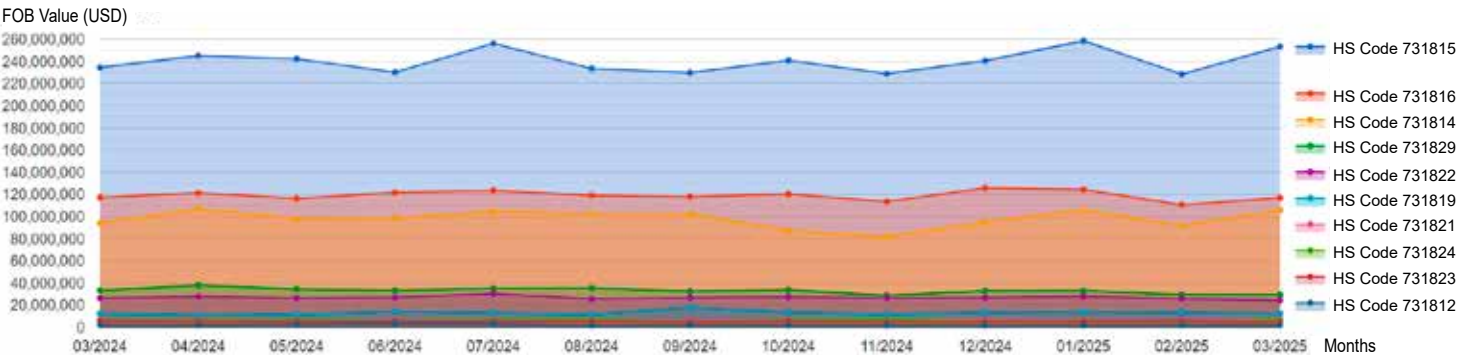


Geopolitical Risk and Supply Chain Vulnerability

Geopolitical tensions have become a critical vulnerability in global supply chains, especially for industries like fasteners that depend heavily on high-volume, low-margin production. Escalating frictions in the Taiwan Strait and the South China Sea—two of the world’s most vital maritime corridors—pose serious risks to logistics stability. Any military conflict or blockade in these regions could cripple shipping routes and delay critical components for weeks or months. The COVID-19 pandemic exposed the fragility of just-in-time inventory systems, as factory shutdowns and container shortages led to massive backlogs and skyrocketing freight rates. For many U.S. and EU companies, those disruptions were a wake-up call: the efficiency gained from centralized sourcing in China came at the expense of resilience. Now, the growing awareness of single-source dependency—especially in politically volatile regions—has prompted a strategic shift. Firms are no longer asking if they should diversify, but how quickly they can do it. Supply chain managers are reassessing their vendor footprints and building in redundancy through regional alternatives, nearshoring, and dual sourcing models to ensure continuity under uncertain global conditions.

U.S. Fastener Imports in Q1 2025 (By Category)

HS Code	2024 - Q1				2025 - Q1				Volume Change			
	FOB Value (USD)	%	Gross Weight (Kg.)	%	FOB Value (USD)	%	Gross Weight (Kg.)	%	FOB Value (USD)	%	Gross Weight (Kg.)	%
731815 - Threaded Screws and Bolts Others, With or Without Their Nuts or Washers, of Iron or Steel	705,183,545	42.65	188,212,294	45.28	740,241,789	44.20	212,706,181	47.40	35,058,244	4.98	24,493,887	13.02
731816 - Nuts, Threaded, of Iron or Steel	358,485,869	21.68	75,891,271	18.26	351,585,618	21.00	79,210,734	17.66	(6,900,251)	-1.93	3,319,463	4.38
731814 - Self-Tapping Screws, Threaded, of Iron or Steel	306,293,030	18.53	106,277,157	25.57	303,437,093	18.12	106,869,642	23.82	(2,855,937)	-0.94	592,485	0.56
731829 - Nonthreaded Articles (Fasteners) Others, of Iron or Steel	101,150,375	6.12	9,158,351	2.21	91,799,988	5.49	8,820,803	1.97	(9,350,387)	-9.25	(337,548)	-3.69
731822 - Washers, Other than Lock Washers, of Iron or Steel	76,445,251	4.63	19,366,313	4.66	77,716,631	4.65	22,459,083	5.01	1,271,380	1.67	3,092,770	15.97
731819 - Threaded Articles of Iron or Steel Others	34,143,228	2.07	3,397,536	0.82	39,405,052	2.36	4,558,192	1.02	5,261,824	15.42	1,160,656	34.17
731821 - Spring Washers and Other Lock Washers, of Iron or Steel	19,466,594	1.18	2,191,081	0.53	20,749,957	1.24	2,259,400	0.51	1,283,363	6.60	68,319	3.12
731824 - Cotter Pins, of Iron or Steel	19,344,769	1.17	2,763,204	0.67	17,620,182	1.06	3,090,067	0.69	(1,724,587)	-8.92	326,863	11.83
731823 - Rivets of Iron or Steel	17,441,695	1.06	2,041,147	0.50	16,485,732	0.99	2,032,011	0.46	(955,963)	-5.49	(9,136)	-0.45
731812 - Wood Screws Other Than Coach Screws, Threaded, of Iron or Steel	7,747,305	0.47	2,057,600	0.50	6,445,174	0.39	1,995,771	0.45	(1,302,131)	-16.81	(61,829)	-3.01
Total	1,653,718,099	100	415,719,625	100	1,674,905,817	100	448,756,374	100	21,187,718	1.29	33,036,749	7.95



Trade compliance and regulatory alignment are becoming critical factors in sourcing decisions, especially as the U.S. and EU adopt stricter controls on imports from regions with questionable labor practices, environmental violations, or national security concerns. U.S. companies must now navigate a complex web of regulations, including Section 301 tariffs, the Uyghur Forced Labor Prevention Act (UFLPA), and customs enforcement protocols that target components with origins in restricted Chinese regions. On the EU side, new supply chain due diligence laws and the Carbon Border Adjustment Mechanism (CBAM) are increasing scrutiny on environmental and ethical standards in manufacturing. Sourcing from EU-based suppliers or countries with existing trade agreements—such as Mexico, Canada, or Eastern European states—not only helps mitigate tariff risks but also simplifies compliance and reduces the likelihood of shipment delays or penalties. For U.S. firms trying to de-risk their supply chains, the alignment of regulatory frameworks between the U.S. and EU offers a more stable and transparent sourcing environment compared to China, where regulatory opacity and sudden policy shifts can create compliance headaches.



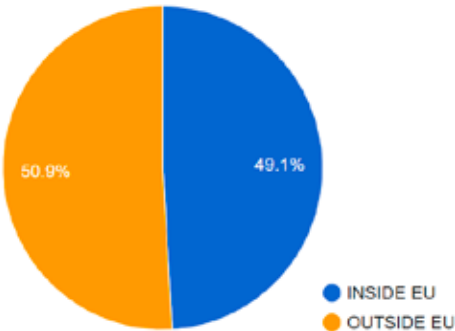
EU Opportunities and Partnerships

The European Union sources approximately half of its fasteners from within the union, with intra-EU trade largely concentrated among major manufacturing nations such as Germany, Italy, and France. However, during the first two months of 2025, internal EU fastener trade experienced a significant downturn—declining by 47% in USD value and 41% in volume compared to the same period in 2024. This drop may be attributed to a combination of softer industrial demand, lingering inflationary pressures, and supply chain recalibrations among EU manufacturers. In contrast, the EU ramped up fastener imports from external suppliers, particularly China, Taiwan, and the United States, during the first quarter of 2025. These increases suggest a shift in procurement strategy, likely driven by competitive pricing, the need to backfill local supply shortages, and efforts to hedge against potential regional disruptions. Additionally, imports from emerging Asian producers such as Vietnam, Thailand, and India also rose notably in both value and volume, signaling the EU’s growing interest in diversifying its sourcing base and reducing dependency on traditional European hubs amid changing global trade dynamics.

EU Fastener Imports from Non-EU Countries in Jan-Feb 2025

Country of Origin	01/01/2024 - 02/29/2024				01/01/2025 - 02/28/2025				Volume Change			
	CIF Value (USD)	%	Net Weight (Kg.)	%	CIF Value (USD)	%	Net Weight (Kg.)	%	CIF Value (USD)	%	Net Weight (Kg.)	%
CHINA	237,325,164	23.92	97,486,849	41.59	327,644,752	28.97	154,686,731	48.76	90,319,588	38.06	57,199,882	58.68
TAIWAN	196,035,540	19.76	49,746,200	21.23	223,178,332	19.73	62,507,502	19.71	27,142,792	13.85	12,761,302	25.66
USA	130,321,830	13.14	2,709,413	1.16	149,347,340	13.21	1,969,174	0.63	19,025,510	14.60	(740,239)	-27.33
TÜRKIYE	100,613,215	10.15	21,987,270	9.39	88,792,251	7.85	19,422,568	6.13	(11,820,965)	-11.75	(2,564,702)	-11.67
SWITZERLAND	82,011,675	8.27	4,406,329	1.88	69,891,060	6.18	3,945,953	1.25	(12,120,615)	-14.78	(460,376)	-10.45
VIETNAM	35,116,073	3.54	14,026,950	5.99	52,949,621	4.69	22,711,789	7.16	17,833,549	50.79	8,684,839	61.92
INDIA	43,662,482	4.41	12,555,901	5.36	49,695,363	4.40	14,179,728	4.47	6,032,880	13.82	1,623,827	12.94
S. KOREA	35,766,560	3.61	6,179,457	2.64	34,875,603	3.09	6,596,816	2.08	(890,957)	-2.50	417,359	6.76
JAPAN	33,157,745	3.35	3,788,174	1.62	29,243,706	2.59	3,275,825	1.04	(3,914,039)	-11.81	(512,349)	-13.53
THAILAND	15,762,926	1.59	8,005,836	3.42	23,609,729	2.09	13,567,729	4.28	7,846,803	49.79	5,561,893	69.48
Total	992,164,895	100	234,405,491	100	1,131,255,998	100	317,296,062	100	139,091,103	14.02	82,890,571	35.37

Top Regions of Origin



As trade barriers, geopolitical risks, and regulatory pressures continue to reshape the global sourcing landscape, U.S. companies are being forced to reassess long-standing dependencies on Chinese fastener suppliers. The volatility of tariffs, the strategic uncertainty in the Asia-Pacific region, and increasingly stringent trade compliance requirements have made China a less reliable hub for critical components. In contrast, the European Union offers not only a more stable geopolitical climate but also regulatory alignment with U.S. standards on labor, sustainability, and transparency. EU-based partnerships—particularly in advanced manufacturing centers like Germany, Italy, and the Czech Republic—present viable alternatives that combine quality, traceability, and logistical resilience. In this new environment, strategic diversification isn’t just prudent—it’s essential. By blending reshoring, nearshoring, and trusted international partnerships, companies can build supply chains that are not only cost-effective but also durable and future-proof in a rapidly shifting global order.

EU Fastener Imports from EU Countries in Jan-Feb 2025

Country of Origin	01/01/2024 - 02/29/2024				01/01/2025 - 02/28/2025				Volume Change			
	CIF Value (USD)	%	Net Weight (Kg.)	%	CIF Value (USD)	%	Net Weight (Kg.)	%	CIF Value (USD)	%	Net Weight (Kg.)	%
GERMANY	760,439,456.84	36.93	134,630,464.00	36.28	408,415,508.92	37.47	87,767,887.00	40.75	-352,023,947.92	-46.30	-46,862,577.00	-34.81
ITALY	291,179,513.25	14.14	60,053,237.00	16.19	150,433,531.04	13.80	32,017,153.00	14.87	-140,745,982.21	-48.34	-28,036,084.00	-46.69
FRANCE	170,065,653.39	8.26	21,970,116.00	5.92	88,759,508.22	8.15	11,673,026.00	5.42	-81,306,145.17	-47.81	-10,297,090.00	-46.87
UNITED KINGDOM	66,562,489.23	3.24	5,562,935.00	1.50	63,094,541.61	5.79	5,161,296.00	2.40	-3,467,947.63	-5.22	-401,639.00	-7.22
NETHERLANDS	126,797,456.40	6.16	34,165,856.00	9.21	62,619,900.59	5.75	16,272,761.00	7.56	-64,177,555.81	-50.62	-17,893,095.00	-52.38
POLAND	101,650,605.16	4.94	18,323,108.00	4.94	52,474,408.66	4.82	11,290,266.00	5.25	-49,176,196.51	-48.38	-7,032,842.00	-38.39
SPAIN	93,181,789.06	4.53	17,193,033.00	4.64	48,470,370.65	4.45	9,537,132.00	4.43	-44,711,418.42	-47.99	-7,655,901.00	-44.53
CZECH REPUBLIC	97,846,592.70	4.76	18,889,059.00	5.09	43,279,220.75	3.97	8,639,988.00	4.02	-54,567,371.95	-55.77	-10,249,071.00	-54.26
AUSTRIA	83,487,905.93	4.06	11,257,936.00	3.04	42,901,918.99	3.94	7,279,861.00	3.38	-40,585,986.94	-48.62	-3,978,075.00	-35.34
BELGIUM	54,365,886.82	2.65	11,603,343.00	3.13	30,556,778.11	2.81	6,906,598.00	3.21	-23,809,108.72	-43.80	-4,696,745.00	-40.48
Total	2,059,296,683.83	100	371,155,920.00	100	1,090,242,939.09	100	215,392,233.00	100	-969,053,744.75	-47.06	-155,763,687.00	-41.97

Copyright owned by Fastener World / Article by Sabrina Rodriguez



**TO BUILD
WHAT YOU WANT**

**FASTENER
WORLD
IS YOUR
BEST PARTNER**

foreign@fastener-world.com.tw

Service
B2B Advertisement
Online Matchmaking
Sourcing Platform
Global Exhibition



www.fastener-world.com

2,000+
suppliers joined us

500+
int'l trade shows attended

70,000+
buyers will see your AD

50,000+
monthly e-newsletters sent to readers



**ISO 9001:2015 Certified
CE EN14592 Certified**

Standard Parts: IFI, DIN, ISO, JIS standard,
Drywall screw, Decking screw,
Self-drilling screw, Self-tapping screw,
Machine screw, Taptite screw.
Non-Standard Parts: Customized Drawings.



Bear Fastening Solutions, Inc.
Office: No. 140-1, Zhuanzijing, Madou Dist.,
Tainan City 721008, Taiwan.
Tel: +886 6 571 5928 Fax: +886 6 571 2845
Email: lionel@bearfs.com.tw

www.bearfs.com.tw







**INTERNATIONAL
FASTENER EXPO**
Visit us at No.841

