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■ ■ ■ ASSOCIATION NEWS

Japan Fasteners Cooperative Association of Kansai Visits Manila, Philippines

The Overseas Information Committee of Fasteners Cooperative Association of Kansai (Western Japan) led a delegation of 7 members on a tour to Manila, Philippines, from October 22 to 24, 2025. The purpose was to gain insights into local market dynamics and business environment while exploring potential future collaboration opportunities.



関西ねじ協同組合

The following day, the delegation visited Yamaguchi Nut Philippines Corporation (affiliated with Japan's Yamaguchi Nut Company), where they received a company overview and details on future development plans. Discussions focused on Philippine market trends and business challenges, followed by a tour of the nut factory to examine production processes. The group then proceeded to Philippines Ogami Corporation (affiliated with Japan's Ogami Co.), listened to a company briefing, and conducted a tour of the mold factory to gain a deeper understanding of local operations.

After concluding the tour, the delegation returned home from Manila. This activity not only gathered valuable overseas information but also strengthened ties between Japanese and Philippine companies, contributing to the association's future internationalization efforts.

The group departed from Kansai International Airport and, upon arriving in Manila, they toured the historic Intramuros district first to experience remnants of the Philippine colonial

■ ■ ■ MARKET WATCH: TRUMP TARIFF 2.0



Japan External Trade Organization

Japanese Companies' Operations in the U.S. Reach a Turning Point: Tariff Pressures Reshape Supply Chains & Profit Structures

According to the 2025 *Overseas Activities of Japanese Companies in North America* survey, released by the Japan External Trade Organization, the study indicates that under Trump's tariff policies, the profitability structure and supply chain configurations of Japanese companies in North America are at a major turning point. The survey highlights the high volatility of the North American business environment, with firms reconfiguring supply chains and business strategies to cope with new tariffs and market risk.

The survey notes that while about 66.5% of Japanese companies in the U.S. still expect to achieve operating profits in 2025, the proportion of improved profit prospects has declined compared with 2024. This reflects how tariff-driven cost

increases and market demand uncertainty are eroding profitability. **Firms are more inclined to source materials and components locally in the U.S. to alleviate cost pressures, a shift that has doubled compared with 2024.** In terms of the supply chain, an increasing number of companies are considering relocating production bases to the U.S. By 2025, 34 firms stated they are reviewing such adjustments—the highest figure since 2019. This move is driven not only by tariff pressures but also by strategic aims to bolster North American competitiveness and shorten supply chains.

Furthermore, facing labor shortages and rising personnel costs, firms must balance cost control with market expansion. **The majority of Japanese companies in the U.S. still plan to expand their business over the next 1-2 years, indicating that the North American market remains strongly attractive in the long term despite policy pressures.**

■■■ MARKET WATCH: CBAM

European High-Energy-Intensive Industries Criticize: Carbon Border Tax Too Lenient on China's "Dirty Imports"

Starting in 2026, the EU imposes carbon fees on cement, iron, steel, aluminum, and fertilizers imported from countries with weaker emissions standards, ensuring "dirty" imports do not gain unfair advantages. EU

domestic products must pay around €80 per ton of CO₂. **European high-energy-intensive industries are deeply concerned that the CBAM is too soft on heavily polluting imports from China, Brazil, and the US, undermining the mechanism's original purpose.**

The main challenge lies in foreign producers not providing precise emissions data, so the EU plans to use default formulas for calculations.

Drafts show that default emissions values for Chinese steel products are even lower than EU equivalents, sparking industry criticism. **Green steelmaker Stegma is surprised that some EU production routes have "higher emissions than China" and suggests adjusting the values.**

Industry warns that low default values will weaken incentives for clean production, allowing high-emission imports to enter the market at low carbon costs, potentially backfiring. CBAM Alliance Acting Chair Leon de Graaf stresses that default values should be set high to "punish" those not reporting real data, or importers will lack motivation to comply. Incorrect values could harm EU producers for two years.

In response, Chinese media reports that these European industry figures overlook China steel sector's green transformation achievements, claiming that by 2024, China's steel industry had 660 million tons of capacity engaged in energy efficiency benchmarking, saving 105,000 tons of standard coal annually per 10 million tons of capacity—totaling 10.5 million tons saved and 27.5 million tons of carbon reduced yearly, equivalent to the annual carbon sink of 570 million trees. China's Ministry of Commerce has urged the EU to uphold fairness, transparency, WTO rules, minimize trade disruptions, and avoid protectionism and green trade barriers.

EU Rejects UK CBAM Exemption: £800M Annual Hit to British Industry

The EU will not grant the UK a CBAM exemption unless the two sides formally link their emissions trading systems. UK government estimates indicate that from 2026, **this will burden British industry with around £800 million in annual carbon fees**, plus heavy administrative requirements like emissions reporting, verification, and certification—similar to post-Brexit paperwork surges.

Limited relief may apply to UK electricity exports.

The EU recognizes higher UK electricity generators' carbon costs, exempting them in principle from CBAM fees, welcomed by the UK government. However, steel, cement, fertilizers, and aluminum exports remain affected. Frank Aaskov, Policy Director for UK Steel, warned that CBAM would heighten competitive disadvantage amid global trade uncertainty. Although the carbon cost for hot-rolled wire is only €13 per ton, market prices are highly sensitive (around €650 per ton), and a €5 difference can determine a purchase decision. The impact is particularly large on small and medium-sized enterprises, making it hard to compete with low-cost imports from China. A UK government spokesperson reiterated prioritizing carbon market linkage to spare £7 billion in exports from CBAM fees. Industry fears eroded competitiveness, urging swift agreement.

■■■ INDUSTRY DEVELOPMENT

Canada Imposes 25% Additional Tariff on Steel Derivative Products

The Canadian government has issued an official announcement imposing a 25% surtax on specified steel derivative products effective December 26, 2025. This measure applies to steel derivatives imported from all countries worldwide, aimed at protecting the domestic steel industry. Importers must declare and pay through the Canada Border Services Agency (CBSA). Goods in transit on the effective date are exempt. **Affected fastener HS codes include: 731811, 731812, 731813, 731814, 731815, 731816, 731819, 731821, 731822, 731823, 731824, 731829.**

Exemptions: Goods covered by existing surtax orders (e.g., China/U.S. steel surtax orders), casual goods, Chapter 98 goods, and in-transit goods.

Temporary Exemptions: Until July 1, 2026, goods for manufacturing motor vehicles or vehicle chassis, or parts/accessories thereof; goods for aircraft, ground flight simulators, or spacecraft, or parts thereof.

Remissions: Case-by-case relief available for goods unavailable domestically or causing severe economic impact. Existing U.S. import remissions temporarily extended through January-June 2026 (depending on use).

Taiwan Requests Consultations on Canada's Steel Import Restrictions to Protect Fastener Industry



The Executive Yuan's Office of Trade Negotiations (OTN) states that Taiwan formally requested consultations under the WTO framework on December 15, 2025, targeting Canada's unfair import restrictions on fasteners and other steel products. The WTO announced this to member states on December 18. OTN acted on appeals by request of Taiwan Steel & Iron Industries Association (TSIIA), aiming to secure a fair competitive environment for Taiwanese businesses.

OTN notes Canada imposed a 25% tariff on global steel derivatives, severely impacting Taiwan's steel interests. **TSIIA estimates total annual losses exceeding NTD1.7 billion, with the fastener industry facing an extra NTD1.3 billion tariff.** OTN emphasizes steel's critical role in national defense and exports, but Canada's restrictions have heavily disrupted Taiwanese shipments. Taiwan has repeatedly raised concerns through bilateral and multilateral channels; while Canada respects Taiwan's rights, it has not proactively resolved the issues.

To prompt mutual benefit discussions, Taiwan activated the WTO dispute settlement mechanism. OTN highlights Taiwan and Canada as like-minded partners with signed agreements on double taxation avoidance, investment protection, and science/technology cooperation. Both should enhance collaboration to combat low-priced steel and illegal transshipment, upholding free and fair trade order.

China's Fastener Exports Exceed 5.1 Million Tons in First 11 Months Despite Price Decline

Despite persistently falling export prices, China's fastener industry demonstrates strong resilience. According to the latest data, **China's fastener exports reached 5.107 million tons in the first 11 months of 2025, up 7.5% year-over-year.** Full-year exports are projected to grow substantially for the second consecutive year, though the average price stood at just USD 1.921 per kg, down 2.7% from the previous year.

January's exports soared to 587,339 tons, setting a historical single-month record. Volumes contracted sharply to 249,243 tons in February and fell further to 411,424 tons in October—the second-lowest monthly figure of the year. November saw a rebound to 493,438 tons, up 19.93% month-over-month and 4.31% year-over-year, approaching the 500,000-ton mark and signaling demand recovery.

On pricing, August 2024 plunged to USD 1.85 per kg—the lowest in 6 and half years. This year, January dipped to USD 1.857 per kg, while March briefly rose to USD 2.008 per kg, ending nine straight months below the USD 2 threshold. October and November slid again to USD 1.893 and USD 1.874 per kg, respectively, both annual lows. By contrast, December 2022 peaked at a record USD 3.278 per kg, with March 2023 at the second-high USD 3.205 per kg.

In 2024, full-year exports totaled 5.289 million tons, up 16.66%, but prices crashed 14.3% to USD 1.97 per kg. Analysts note that **low pricing remains a key competitive edge, driving volume growth amid price-volume divergence.** Historical lows, like February 2023's 190,000 tons, underscore volatility, yet **the overall upward trend bolsters China's global market share.**



COMPANIES DEVELOPMENT



Chun Yu Conference Highlights Vertical Integration and Global Deployment for Fastener Dominance

Taiwanese wire rod leader Chun Yu emphasized at its December 24, 2025 conference that vertical integration and global operations sustain its unbeatable edge in construction and industrial fasteners, with long-term low-carbon process strategies to meet international sustainability and supply chain demands.

Despite global economic cycles pressuring the fastener industry, Chun Yu maintains solid profitability. **Gross margins held 14%-16% from 2022-2024, reaching 13.8% in the first three quarters of 2025, with operating profit margins above 4%, demonstrating strong cost absorption and pricing power amid raw material fluctuations and demand shifts.** Taiwan remains the core market at 35%, followed by Hong Kong/China and Southeast Asia at 23% each, with Europe and the U.S. totaling 16%—high diversification reduces single-region risks.

Looking ahead, Chun Yu anticipates short-to-medium-term rate cuts spurring infrastructure investments and steel fastener demand; long-term focus shifts to low-carbon electric arc furnace processes and products, raising entry barriers. Upon economic recovery, the company stands ready to seize opportunities and generate peak profits.





Walsin Lihwa Launches Stainless Steel Brand "Steeval" Targeting AI Precision Machining

Walsin Lihwa unveils its new stainless steel cold-finished bar brand "Steeval." The AI era ushers in a new chapter for metal processing, with Taiwan entering global supply chains for automation, new energy, robotics, and aerospace. "Steeval" signals the company's transformation from material supplier to comprehensive technical service solutions provider.

Taiwan's steel industry fueled the rise of its fastener kingdom. Facing precision manufacturing upgrades, Walsin Lihwa offers full-spectrum solutions—from products and processes to services. Its cold-finished bars hold top market share globally, featuring high machinability, cleanliness, wear/corrosion resistance, heat resistance, and soft magnetic properties. They support fasteners, automotive, aerospace, semiconductors, AI servers, and automation precision needs. The new brand initially integrates Taiwan and China production lines, with plans to incorporate premium European products for higher value.

By the end of 2026, China, Taiwan, and Europe cold-finished bar output will reach 180,000 tons annually: China monthly from 3,500 to 5,000 tons, Taiwan from 4,000 to 5,000-6,000 tons. Walsin Lihwa's annual stainless steel capacity is 1.3 million tons, with cold-finished bars at 10%—primarily targeting at automotive, rising to 13.8% targeting at new energy vehicles.



Packer Fastener Launches New Distribution Center to Boost Service for Construction and Industrial Sector

Packer Fastener, a premier distributor of threaded fasteners and industrial supplies, has unveiled its latest distribution hub in Pearl, strategically positioned to support the Jackson region. This state-of-the-art facility enhances service for commercial contractors, manufacturers, and fabricators throughout Mississippi and the Southeast U.S., with a particular focus on fast-growing industries such as data centers, electric vehicle battery and automotive manufacturing, power generation, and heavy industrial construction.

Industries We Serve

- ✓ Automotive
- ✓ Construction
- ✓ Electronics
- ✓ Machinery
- ✓ Customized/Special Product
- ✓ OEM/ODM

Material

✓ High carbon steel	✓ Aluminum
✓ Low-carbon Steel	✓ Alloy steel
✓ Medium-carbon steel	✓ Brass
✓ Stainless Steel	

Products

- ✓ Stainless Steel/Brass Screws
- ✓ Construction/Furniture Screws
- ✓ CNC Machining / Multi Station Screws
- ✓ Standard Screws
- ✓ Custom Fasteners
- ✓ Special Fasteners
- ✓ SEMS Screws
- ✓ Washers, Nuts

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The opening represents a key step in Packer Fastener's expansion plans, driven by surging customer needs and the company's dedication to superior inventory access and responsive support. Linked directly to the Atlanta distribution center, the Jackson hub ensures procurement teams, project leads, and site managers maintain seamless workflows free from delays. "Expanding our footprint brings us closer to the communities we serve," stated Terry Albrecht, CEO of Packer Fastener. "With the backing of our robust Atlanta operations, this new Pearl location reinforces our role as a dependable partner for regional construction and industrial projects—delivering the rapid, reliable service our customers expect."

Portland Bolt Expands South Carolina Manufacturing Facility

U.S. anchor bolt and nonstandard construction fastener manufacturer Portland Bolt has expanded its production plant in North Augusta, South Carolina. The facility has grown from 25,000 to 62,500 square feet, significantly boosting production capacity, enhancing service levels, and shortening lead times for customers across the Eastern U.S.

The expansion features a new hot-dip galvanizing line, delivering consistent, high-quality corrosion protection for Portland Bolt's products. This system not only streamlines internal manufacturing but also offers galvanizing services to external partners in industries including construction, infrastructure, fabrication, utilities, and transportation. "This expansion underscores our commitment to supporting





customers with unmatched speed, quality, and technical expertise," said Blake Ray, CEO of Portland Bolt. "By strengthening our East Coast presence and adding new capabilities, we're improving national coverage with greater rush-order capacity, faster turnaround times, and smoother production flows—enhancing our ability to meet urgent project demands and deliver industry-leading service." Operations VP Todd McGurk added that the additional space and equipment ensure even greater efficiency in producing, galvanizing, and shipping high-quality products.

MinebeaMitsumi Joins Boeing's Certified Supplier List for Aircraft Fasteners

MinebeaMitsumi will manufacture two types of fasteners to support Boeing's 737 MAX and 787 Dreamliner aircraft programs. Moving forward, the company will continue strengthening quality management and supply systems, maintaining high quality standards to contribute to the aerospace industry. The MinebeaMitsumi Fujisawa Plant originated as the factory of Tokyo Screw Manufacturing Co., Ltd., founded in Minato-ku, Tokyo, in 1898, and relocated to its current site in 1921. In 1981, it was absorbed and merged into Minebea Co., Ltd. Fujisawa Plant. Current main operations span aircraft fasteners and machined parts, measurement instruments with strain gauges as core technology, and products like railway/industrial motors and electromagnetic clutches.



BMW Discloses Patent "Logo Screw" Design

Carscoops reports **BMW has publicly disclosed a patent for a custom screw head mimicking its iconic round logo. Unlike standard Phillips, hex, or Torx designs, if it goes to mass production it could mandate specialized tools for removal.**



Patent illustrations show the screw head divided into four quadrants inspired by the brand emblem: two recessed, two flat or raised, creating a unique geometric profile operable only by matching bits. Documents stress conventional screws are easily manipulated by anyone; BMW aims to limit access to authorized personnel for operation, removal, or installation. The logo structure is non-replicable without permission, covering screws and tools. Primary applications target vehicle interiors: cockpit-to-body connections, center console mounting, seat fasteners. Variants include half-round, countersunk, and cylindrical heads for enhanced visibility.

Carscoops notes such non-standard fasteners boost brand recognition but challenge mechanics and DIY owners—standard toolkits won't grip, requiring BMW-specific sets for critical parts. However, carmakers file many patents annually with many unrealized. This design, filed June 7, 2024, and published December 11, 2025, remains conceptual.



Whitesell Group is now Altius Solutions, Inc.

Whitesell Group—including Whitesell Corporation, Thread Rite Screw Products, Whitesell Supply, and Whitesell Precision Components—announces its new name “Altius Solutions, Inc.” as a North American powerhouse in engineered fasteners, components, and supply-chain management.

Over five decades, Altius has mastered an uncommon blend of in-house production, value-added distribution, and a robust global sourcing network. This integration enables delivery of precision fasteners, assemblies, fabrications, and Class C components with exceptional scale, adaptability, and seamless coordination unmatched by competitors. Customers gain flexible sourcing choices: in-house cold heading, advanced machining, and sheet-metal fabrication for rapid control, or cost-effective global vendor partnerships cultivated for decades. Parts arrive as individual items, kits, assemblies, VMI, or 3PL services tailored to exact specifications.

Altius serves expanding sectors including aerospace, automotive, HVAC, energy, heavy equipment, and specialized industrials, partnering with leading OEMs and manufacturers. "Our name 'Altius' signifies 'higher,' embodying our daily commitment to excellence," stated Jason Albro, President of Altius. "This rebranding launches our next evolution phase. Customer trust remains our foundation—we stay dedicated to dependable solutions that empower confident scaling."

Tesla Non-Metal Fasteners Solution Boosts Cybertruck Corrosion Resistance & Efficiency

Tesla's latest breakthrough targets a seemingly ordinary yet critical component: the fastener. This innovation not only ensures structural integrity for vehicles like Cybertruck but also transforms manufacturing processes. Combining different metals, such as stainless steel body panels with traditional fasteners, often triggers galvanic corrosion, leading to premature rust, especially in harsh environments. The Cybertruck's stainless steel exoskeleton faced this issue, as standard steel fasteners couldn't endure it, while stainless steel alternatives proved too costly and mechanically inflexible for mass production.

Tesla conceived a non-metal fastener system featuring a central rotating lock and flexible housing, completely avoiding metal corrosion problems. Through a unique mechanical leverage mechanism, these fasteners secure vehicle panels with unprecedented strength. High-strength glass fiber-reinforced polyamide polymers ensure durability, challenging the conventional belief that only metals provide reliable structural robustness. This system allows pre-assembly on parts to reduce assembly line labor and time. Snap-fit designs ensure stability during transport, optimizing logistics and processes. Though made of "plastic," these fasteners match metal endurance against high wind resistance and vibrations. Their reusable design facilitates easy removal and reinstallation, minimizing waste and demonstrating sustainability commitment. This technology supports the "Unboxed" modular manufacturing for future models like Robotaxi. Replacing metals with polymers yields major cost savings while maintaining quality and margins.

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United States of America

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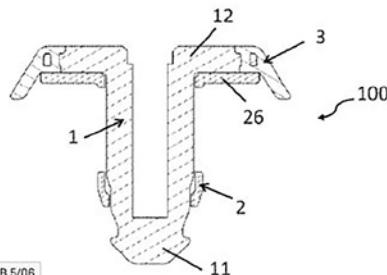
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■ ■ ■ ACQUISITIONS

Japanese Seika Corporation Acquires Coating Machine Maker Asahi Sunac



西華產業株式會社
SEIKA CORPORATION



Seika Corporation announced it acquired 100% of the shares in Asahi Sunac—a manufacturer and seller of coating machines, die-casting machines, and precision cleaning equipment—on December 1, 2025, making it a subsidiary. The market has expectations of performance contributions. The two companies previously established joint ventures in Germany and Thailand. This acquisition aims to leverage Seika Corporation's expertise as a comprehensive machinery trading firm, deepening collaboration not only in sales but also in business development. The acquisition price was not disclosed.

Howmet Aerospace Acquires Stanley Black & Decker's Aerospace Manufacturing Business for USD 1.8 Billion



Howmet Aerospace announced it has signed a definitive agreement with Stanley Black & Decker to acquire its subsidiary Consolidated Aerospace Manufacturing (CAM) for approximately USD1.8 billion in cash. CAM is a global leader in the design and manufacture of precision fasteners, fluid fittings, and other highly engineered products for aerospace and defense applications. The transaction qualifies for favorable federal tax treatment, delivering significant tax benefits to Howmet. Howmet expects CAM's fiscal 2026 revenue to range from USD485 million to USD495 million, with EBITDA margins exceeding 20% (excluding synergies). Including synergies and tax benefits, the transaction multiple is approximately 13x.

Howmet Executive Chairman and CEO John C. Plant stated: "The acquisition of CAM is an important step in expanding our differentiated fasteners portfolio. CAM's established brand, engineering expertise, and deep customer relationships perfectly complement this transaction, enabling us to serve aerospace and defense customers with a broader range of critical fastening solutions and create value for shareholders." The deal is expected to close in the first half of 2026. This move strengthens Howmet's leadership position in the high-demand aerospace market.

RCF Bolt & Nut Acquires Lyndenway Fixings



RCF BOLT & NUT

LYNDENWAY FIXINGS LTD

This move represents a key step in RCF's ongoing growth strategy, expanding its product range and enhancing its capacity to meet rising customer demand across multiple sectors. **By integrating Lyndenway's expertise and product portfolio, RCF can now offer a broader selection of fasteners with improved efficiency and availability.** Both companies share a longstanding commitment to quality, reliability, and exceptional customer service. The acquisition supports RCF's mission to invest in UK manufacturing, expand capabilities, and deliver the best possible solutions to customers.

RCF looks forward to the opportunities this deal brings, continuing to grow, strengthen its strengths, and uphold the high standards customers expect from RCF. As a key player in the UK fastener market, this transaction not only expands market share but also highlights the resurgence of domestic manufacturing, helping the company stand out in a competitive global supply chain.

Valley Fastener Group Acquires Chicago Fastener



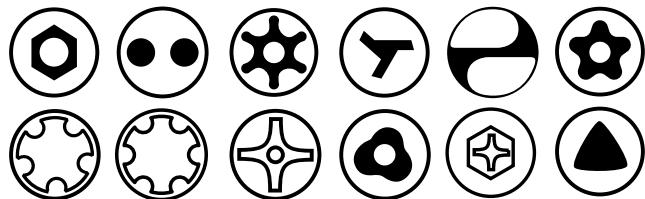
CHICAGO
FASTENER
AMERICAN MADE

Valley Fastener Group proudly announces the acquisition of Chicago Fastener, a strategic move that broadens its portfolio of companies and reinforces its dominant position in the fastener industry. For over five decades, Valley Fastener Group has earned its reputation as a reliable U.S.-based producer of semi-tubular and solid rivets, threaded components, and custom cold-formed specialties—all rooted in its renowned heritage of superior rivet solutions. **The addition of Chicago Fastener enhances its ability to provide customers throughout North America with expanded production capacity, cutting-edge innovation, and unmatched value.** This integration promises stronger service and growth opportunities as it continues to lead the market. ■

Security Fasteners

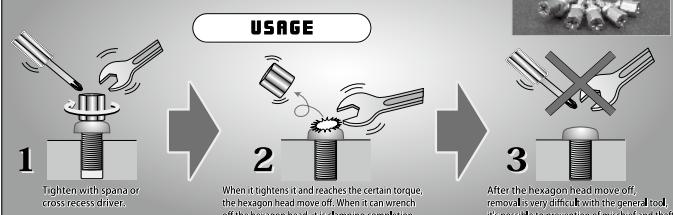
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