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EUROPEAN INDUSTRIAL FASTENERS INSTITUTE



Industrial Accelerator Act Makes "Made in EU" Work for the Entire European Automotive Value Chain

EIFI calls for a stronger Industrial Accelerator Act to safeguard Europe's entire automotive value chain. New White Paper warns that "Made in EU" requirements must extend beyond vehicle assembly to components and mid-stream industries if Europe is to preserve its manufacturing base.

The European Industrial Fasteners Institute (EIFI) calls on European policy makers to strengthen the Industrial Accelerator Act (IAA) by ensuring that "Made in EU" requirements protect not only vehicle production and assembly, but the entire European automotive value chain, including components, mid-stream industries and SMEs.

In a new White Paper on the Industrial Accelerator Act, EIFI provides evidence from the European fasteners industry showing the increasing pressure faced by European component manufacturers and proposes a concrete "Made in EU" safety net designed to preserve existing European industrial capabilities.

"A resilient European automotive industry requires resilient European supply chains. **Europe cannot strengthen its automotive industry by focusing only on the final vehicle while progressively losing the industrial capabilities, know-how, investment and employment embedded in the components that make that vehicle possible**," said Paolo Pozzi, President of EIFI.

› European Automotive Suppliers Under Increasing Pressure

Fasteners are essential components across automotive manufacturing and represent a particularly relevant example of the challenges faced by Europe's mid-stream industries, which are largely composed of SMEs.

EIFI's White Paper shows that competitive pressure from Chinese imports has intensified, particularly since 2021.

For products not covered by anti-dumping measures, **the EU market share of European fasteners fell by 7 percentage points between 2021 and 2025. Significant price pressure also remains: Automotive suppliers are particularly exposed.**

A sample of 102 European fastener companies, representing 41.9% of total EU fastener sold production value in 2025, recorded a 12.2% decline in production volumes between 2019 and 2025, while volumes in the rest of the industry remained broadly stable.

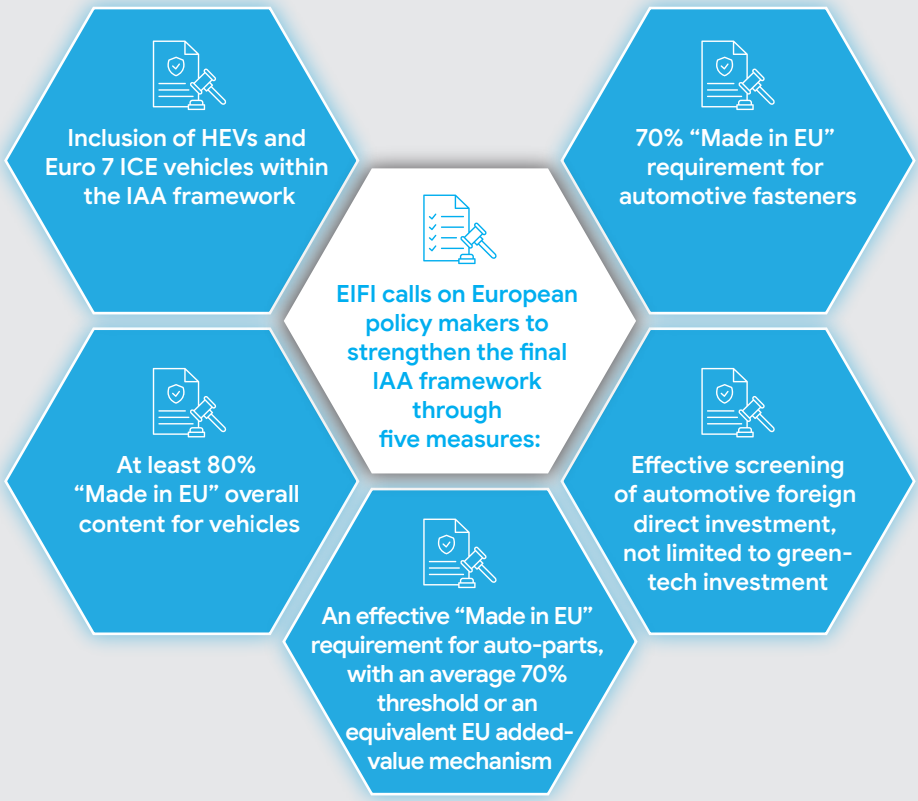
› A "Made in EU" Safety Net

EIFI estimates that "Made in EU" fasteners currently represent approximately 63% of fasteners purchased by the European automotive industry overall and 72% in the automotive sector.

The Institute therefore proposes a 70% "Made in EU" requirement for fasteners supplied to automotive OEMs and first-tier suppliers.

The proposed threshold is deliberately conceived as a safety net: rather than attempting to create an artificial new market structure, it aims to preserve the European industrial base that already exists and prevent its progressive displacement by extra-EU sourcing.

› EIFI: Five Priorities for the Industrial Accelerator Act



› Protecting Vehicles is not Enough

EIFI warns that local-content provisions limited mainly to vehicle production could produce unintended consequences further down the automotive supply chain.

If OEMs face stronger European-content requirements at vehicle level without corresponding safeguards for components, competitive pressure could increasingly be transferred to second- and third-tier European suppliers.

The White Paper therefore argues that auto-parts must also be brought effectively within the "Made in EU" framework.

"The objective should not simply be to assemble more vehicles in Europe. It must be to retain in Europe a meaningful share of the value, production and industrial know-how contained in those vehicles," Paolo Pozzi added. "If European industrial policy protects the end product but allows its supply chain to disappear, Europe will not have achieved genuine industrial resilience."

› The Cost of Inaction is Increasing

EIFI also challenges the argument that stronger local-content provisions would necessarily create an excessive new administrative burden.

European OEMs and first-tier suppliers already manage origin requirements for exports under EU trade agreements, while many automotive groups operating in Europe also comply with demanding local-content rules in North America.

According to the White Paper, extending comparable traceability requirements to the IAA could therefore build substantially on processes that already exist.

At the same time, EIFI points to rapidly widening EU trade deficits with China in vehicles, auto-parts, tyres and batteries, warning that the economic consequences of inaction are becoming progressively greater.

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› A Call to European and National Policy Makers

EIFI is calling on the European Parliament, European Commission, Member States and national governments to ensure that the final Industrial Accelerator Act recognises the strategic importance of the complete European automotive supply chain.

The Institute also calls for the voice of mid-stream industries and SMEs to be fully reflected in the ongoing debate on European industrial policy.

"Europe still has an extraordinary automotive industrial ecosystem. The objective of the Industrial Accelerator Act should be to ensure that we preserve it," concluded Paolo Pozzi. "Made in EU must mean more than where a vehicle is finally assembled. It must reflect the European industrial value that exists throughout the vehicle."

The EIFI White Paper on the Industrial Accelerator Act – "A 'Made in EU' Safety Net for the European Fasteners Industry" and its Executive Summary are available from EIFI.

› About EIFI

The European Industrial Fasteners Institute (EIFI) represents the interests of European manufacturers of industrial fasteners and brings together national fastener associations and their members together with its supply-chain across Europe.

Founded in 1977, EIFI gathers 6 national associations (ARTEMA-France, ASEFI-Spain, CBM-United Kingdom, DSV-Germany, PSPEZ-Poland, and UPIVEB-Italy), 179 manufacturing companies, counting for 75% of the European fasteners production, and 137 supply-chain companies. The majority of EIFI members are SMEs.

EIFI works with European and national institutions on industrial competitiveness, trade, sustainability and regulatory policies affecting the European fastener industry and its downstream markets.

> www.eifi.org ■

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