

Fastener Trade in H1 2026:

U.S.–EU Growth, Product Shifts and Policy Change

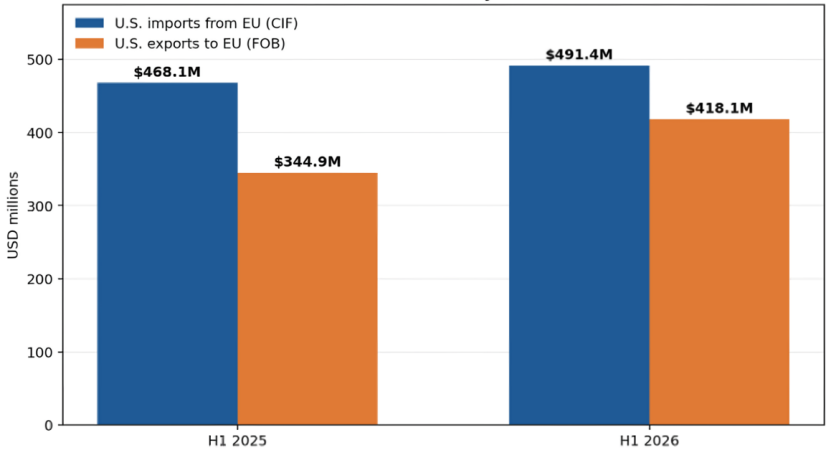
Trade in iron and steel fasteners between the United States and the European Union strengthened in the first half of 2026, but the result was not a uniform increase across every product or market. U.S. imports of fasteners under HS 7318 from the EU rose 5.0% year over year to US$491.4 million. U.S. exports to the EU increased much more quickly, rising 21.2% to US$418.1 million.

The result was a narrower U.S. trade deficit in the HS 7318 category. On an approximate basis, the deficit fell from US$123.2 million in H1 2025 to US$73.4 million in H1 2026. The comparison should be read directionally because U.S. imports are reported on a CIF basis while exports are reported on an FOB basis. Still, the data shows that **U.S. fastener exports to Europe grew substantially faster than European fastener shipments into the United States** ***(Figure 1)***.

This development occurred as the U.S. and EU continued to implement their 2025 framework on reciprocal, fair and balanced trade. The framework is not a conventional free-trade agreement, but it is important to bilateral industrial trade. The EU committed to eliminate tariffs on U.S. industrial goods, while the United States committed to a 15% tariff ceiling for most EU-origin goods. Steel, aluminum and derivative products remain a distinct area of discussion, with both sides considering measures to address global overcapacity and strengthen supply chains, including possible tariff-rate quota solutions.

For fastener producers, distributors and buyers, the H1 figures therefore provide an early view of trade patterns in a market facing new tariff, sourcing, carbon-compliance and industrial-policy considerations.

Fig. 1. **U.S.-EU Fastener Trade Expanded in H1 2026**



Data note: The data for this article is derived from the US Census trade statistics. US Census trade statistics analyze imports across all modes of transportation. The value is calculated in CIF USD or FOB USD. The HS Codes represented in this article are 7318 and its subcategories.

European Fastener Imports into the United States Remain Concentrated

U.S. imports of HS 7318 fasteners from the EU increased from US$468.1 million in H1 2025 to US$491.4 million in H1 2026. Germany remained the largest European source, supplying US$172.6 million, followed by Italy at US$154.6 million and France at US$64.9 million. Germany's shipments grew 4.4%, while Italy rose 4.3% and France increased 8.4%. Together, these three countries accounted for 79.8% of U.S. fastener imports from the EU in H1 2026 and generated approximately four-fifths of the overall dollar increase.

The data reinforces the importance of Germany, Italy and France in transatlantic industrial fastening supply. Their leading positions likely reflect a combination of established manufacturing capacity, specialized product capability, proximity to major European machinery and automotive industries, and long-standing commercial relationships with U.S. customers.

Several smaller EU suppliers also posted notable increases. Imports from Spain rose 12.0% to US$19.0 million, Czech Republic shipments grew 10.5% to US$11.9 million, and Poland increased 14.8% to US$7.4 million. These movements suggest that **the U.S. market is drawing more supply from Central and Southern Europe as well as from the EU's largest traditional manufacturing centers.**

Not every supplier expanded. Imports from the Netherlands declined 9.6%, Austria fell 5.6%, Hungary dropped 23.2%, and Bulgaria decreased 25.3%. These declines should not necessarily be interpreted as lost competitiveness without product-level detail, but they show that the 5.0% headline increase was not evenly distributed across Europe.

Screws, Bolts and Nuts Drove Import Growth

The product data shows that **growth in EU fastener exports to the United States was concentrated in the two largest HS 7318 categories: other threaded screws and bolts under HS 731815, and threaded nuts under HS 731816** ***(Figure 2)***.

Fig. 2. **EU Fastener Imports into the U.S. were Led by Screws, Bolts and Nuts**

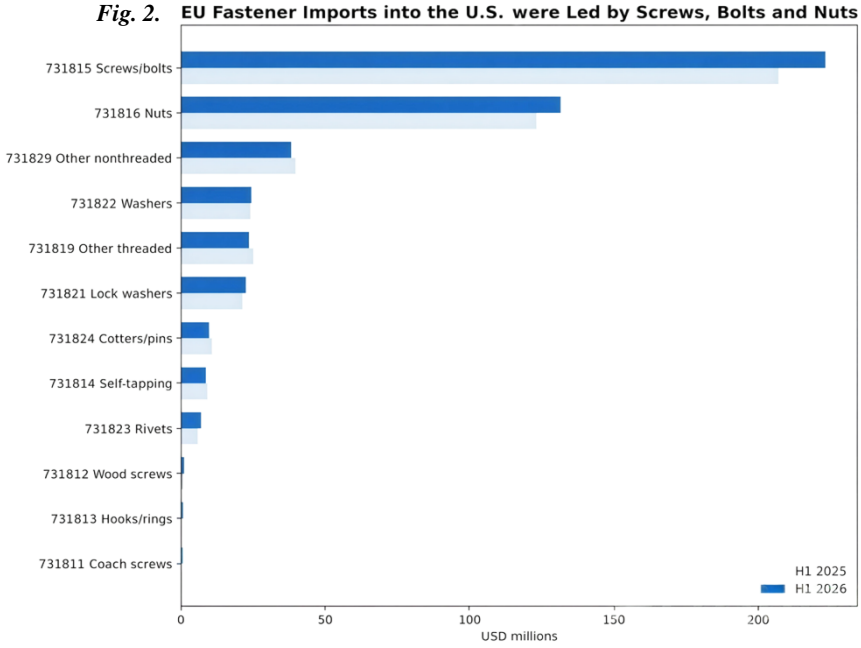
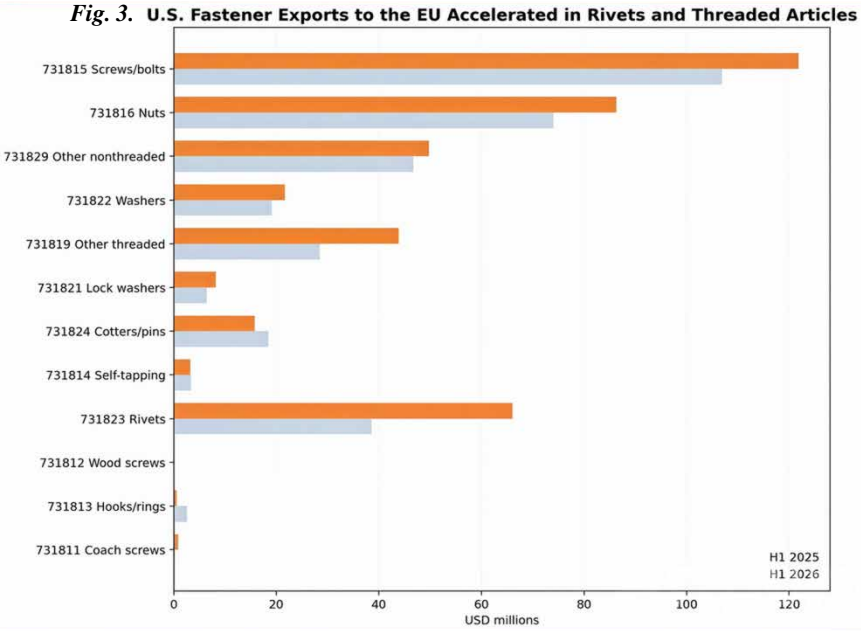


Fig. 3. **U.S. Fastener Exports to the EU Accelerated in Rivets and Threaded Articles**



Imports of HS 731815 rose 7.9% to US$223.3 million, representing 45.4% of all U.S. imports from the EU in the broader HS 7318 category. Threaded nuts under HS 731816 increased 6.8% to US$131.6 million and represented another 26.8% of the total.

Combined, these two categories accounted for 72.2% of U.S. fastener imports from the EU in H1 2026, up from 70.6% one year earlier. Their combined increase of US$24.6 million was greater than the total net increase in EU fastener imports, because declines in several other categories partly offset their growth.

The remaining categories presented a mixed picture. Imports of spring and lock washers increased 5.3% to US$22.4 million, and rivets rose 18.3% to US$7.0 million. However, imports of other non-threaded fasteners declined 3.9%, other threaded articles fell 5.8%, cotters and cotter pins decreased 10.1%, and self-tapping screws dropped 6.7%.

The result is a more focused picture of the market. **The increase in European supply was not a general rise across all fasteners. Instead, it was driven primarily by core screws, bolts and nuts used across industrial assembly, machinery, transport equipment, maintenance and other manufacturing applications.**

U.S. Exports to Europe Accelerated

The U.S. export profile was more dynamic. Total U.S. HS 7318 exports to the EU increased by US$73.2 million, reaching US$418.1 million in H1 2026. While other threaded screws and bolts remained the largest export category, the fastest and most consequential gains came from rivets and other specialized threaded products.

U.S. exports of HS 731815 increased 14.0% to US$121.9 million ***(Figure 3)***, while threaded nuts under HS 731816 rose 16.7% to US$86.4 million. Rivet exports under HS 731823 jumped 71.2%, from US$38.6 million to US$66.1 million. **This US$27.5 million increase made rivets the largest single contributor to total U.S. export growth.**

Exports of other threaded articles under HS 731819 also rose sharply, increasing 54.2% to US$43.8 million. Other non-threaded fasteners, washers, and spring or lock washers posted more moderate gains. By contrast, exports of cotters and cotter pins declined 14.3%, self-tapping screws fell

5.1%, and screw hooks and rings dropped from US$2.6 million to US$0.5 million.

The contrast with the import data is notable. **European shipments to the United States were dominated by screws, bolts and nuts. U.S. exports to Europe were also led by those core products, but much of the incremental growth came from rivets and other threaded articles. This may indicate stronger U.S. participation in specialized or higher-value industrial fastening applications,** although trade data alone cannot identify the final end use.

Germany and Central Europe Drove U.S. Export Growth

The country-level export data points to a changing U.S. market position within Europe. **Germany became the largest destination for U.S. HS 7318 exports,** with shipments rising 46.0% to US$122.9 million. Poland recorded the largest percentage gain among the major destinations, increasing 85.2% to US$46.2 million *(Figure 4)*.

Italy and Spain also posted strong increases. U.S. exports to Italy rose 50.8% to US$34.5 million, while shipments to Spain increased 54.6% to US$29.6 million. Together, Germany, Poland, Italy and Spain added approximately US$81.0 million in U.S. fastener exports compared with H1 2025—more than the total EU-wide increase.

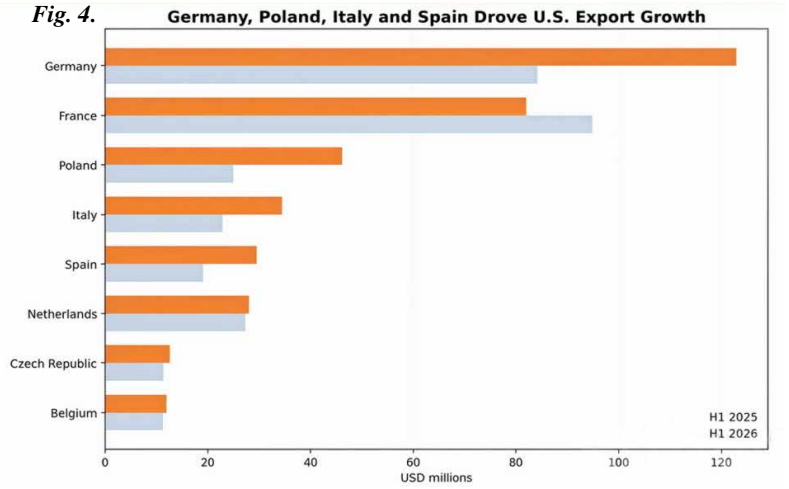
That apparent contradiction reflects declines elsewhere. France remained the second-largest EU destination for U.S. fastener exports at US$82.1 million, but shipments declined 13.6%. Slovakia also fell sharply, decreasing from US$7.2 million to US$1.1 million. These changes illustrate why the EU should not be viewed as a single, uniform fastener market. Country-level manufacturing demand, local distribution networks, sourcing strategies and product specialization can produce sharply different results within the same trade bloc.

The export pattern also suggests greater importance for Central and Southern European markets. Poland's strong growth is particularly relevant because of its manufacturing role within European supply chains, while gains in Germany, Italy and Spain reinforce the continued importance of established industrial economies.

Trade Policy, Carbon Costs and Competition

The U.S.–EU trade framework provides a more predictable basis for transatlantic trade than the tariff uncertainty that preceded it, but it does not eliminate complexity for fasteners. The U.S. and EU have committed to continued work on tariffs, non-tariff barriers, standards, rules of origin and economic-security issues. In May 2026, EU institutions reached political agreement on regulations intended to eliminate

Fig. 4.



tariffs on U.S. industrial goods, with formal adoption and entry into force still required at that point.

For fastener trade, the steel and derivative-product dimension remains especially important. Companies should evaluate the specific tariff treatment of the applicable 8- or 10-digit classification rather than assuming that every product within HS 7318 is treated identically.

The EU's Carbon Border Adjustment Mechanism is also now part of the commercial environment. CBAM entered its definitive regime on January 1, 2026 and applies to selected carbon-intensive imports, including iron and steel goods. It creates authorization, reporting and certificate obligations for importers and places greater emphasis on embedded-emissions information in the supply chain. **For U.S. suppliers selling into Europe, product quality, pricing and delivery performance may increasingly need to be accompanied by credible emissions data and compliance support.**

Competition within Europe also remains shaped by the EU's trade-defense measures on certain Chinese iron and steel fasteners. Those measures were designed to address price undercutting and preserve a level playing field for European producers, particularly in a market that includes both commodity products and high-specification applications.

Outlook

H1 2026 shows a transatlantic fastener market that is growing in both directions, but with different sources of momentum. European imports into the United States increased steadily and remained concentrated in screws, bolts and nuts supplied primarily by Germany, Italy and France. U.S. exports to Europe grew much faster, supported by stronger sales of rivets, specialized threaded articles, screws and nuts.

The figures do not prove that the new U.S.–EU framework caused these shifts. However, the framework, the evolving treatment of steel-related products, and the start of CBAM's definitive phase are all likely to influence sourcing and investment decisions through the remainder of 2026.

For the fastener industry, the central takeaway is that bilateral trade is becoming more specialized rather than simply more volume-driven. Companies that can demonstrate technical capability, reliable supply, transparent origin and material documentation, and readiness for changing tariff and carbon requirements will be better positioned to compete in both the U.S. and European markets. ■

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