



Supply and Demand for Fasteners in Brazil by 2025

2025 巴西紧固件供需分析

According to the latest comprehensive market data report, Brazil's economic performance in each quarter of 2025 and across the year exhibited significant fluctuations. First-quarter GDP growth benefited from robust export momentum (a 1.4% quarterly increase compared to Q4 2024), placing Brazil at the forefront among all G20 nations- even outperforming China and Turkey.

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However, the good times did not last. The second quarter saw a turning point, with economic momentum slowing and facing multiple challenges, which was primarily due to persistently rising inflationary pressures in the market (with some Brazilian economists projecting the annual inflation rate for 2025 to reach 4.45%), forcing the Central Bank of Brazil to maintain its benchmark interest rate at a high of 10.75%. This has damped investment sentiment and consumer demand in the domestic market to a certain extent. Additionally, the

Brazilian government's recent implementation of stricter fiscal measures to achieve budgetary targets indirectly contributed to the deceleration in economic growth.

Market analyses generally suggested that Brazil's GDP performance for the full year of 2025 might not see a significant growth surge, with forecasts potentially declining to around 2% (Moody's projected 2.1%, the Central Bank of Brazil projected 2.0%, and Deloitte projected 2.8%). Growth projections for the subsequent years of 2026 and 2027 may also be revised downward to below 2%. Furthermore, following U.S. President Trump's imposition of 50% tariffs on global steel and aluminum imports, declining U.S. orders have slowed market demand. This has also imposed substantial operational cost pressures on related industries within South America's largest economy. Under these combined market and regulatory impacts, various Brazilian industries are beginning to sense signs of fluctuating supply and demand within the local market.

The following statistics show the changes in Brazil's fastener imports and exports in 2023, 2024, and 2025. Imports and exports of fasteners reveal different fluctuating trends.

Imports ////

Brazil's imports of fasteners showed growth in both volume and value between 2023 and 2024, with only imports from the United States and India experiencing a reversal and decline. In 2025, Brazil imported approximately 241,525,298 metric tons of fastener products globally; in monetary terms, imports totaled about US\$1.11 billion. China, Italy, and Japan were Brazil's top three import partners, with over 60% of imported fasteners originating from China, clearly demonstrating China's dominant position in Brazil's fastener imports. Additionally, approximately 5% came from Italy and 4% from Japanese suppliers, though their supply volumes fell far short of those from Chinese manufacturers. Taiwan, alongside the United States and Germany, each held about a 3% market share in Brazil's fastener market. South Korea, India, and France also ranked among Brazil's top ten fastener import partners.

Forecast of Brazil's GDP Performance for the Full Year of 2025



INDUSTRY FOCUS

HS 7318 Iron and steel screws, bolts, nuts, screw hooks, rivets, washers (incl. spring washers), cotter pins and similar articles

Ranking	Import Source	2023(KG)	2024(KG)	2025(KG)	2023(USD)	2024(USD)	2025 (USD)
0	Global	173,081,126	230,540,186	241,525,298	921,454,730	1,059,363,375	1,114,922,739
1	China	93,848,116	145,015,045	156,613,646	221,048,188	290,193,849	309,484,733
2	Italy	10,950,656	12,592,622	13,752,931	71,281,714	82,230,744	96,858,760
3	Japan	9,947,884	11,009,975	11,885,614	74,918,089	82,093,242	90,089,275
4	USA	9,771,977	9,110,397	7,612,193	180,088,252	179,607,660	180,927,922
5	Germany	7,256,242	7,752,200	7,498,616	82,760,609	91,535,615	92,800,999
6	Taiwan	6,009,282	6,525,401	7,396,227	29,119,514	34,653,980	39,320,541
7	S. Korea	5,192,836	5,531,747	6,089,117	27,204,933	29,422,351	29,800,994
8	India	5,842,567	4,933,610	4,656,008	25,078,653	23,264,495	25,142,189
9	France	3,270,221	3,883,839	4,257,667	47,882,221	56,769,299	63,450,291
10	Hong Kong	2,996,403	4,662,633	3,298,771	6,127,269	9,297,488	6,973,478

(Note: Table data sorted by weight for 2025; source: <http://comexstat.mdic.gov.br/en/geral>)

Export ////

Although Brazil is primarily an import-oriented country for fasteners, **its domestic fastener industry still exports a portion of its products to foreign markets. However, these exports are largely confined to the United States and South American nations.** Among Brazil's top ten export partners, only Germany and France are European countries. Brazil's fastener exports began showing signs of decline as early as 2023. In 2025, Brazil exported approximately 23,000 metric tons of fasteners globally, valued at around US\$162 million. A significant portion was exported to Argentina, Paraguay, the United States, and Uruguay. **Argentina accounted for about 35% of Brazil's total fastener exports**, Paraguay for approximately 21%, the United States for roughly 13%, and Uruguay for about 6%.

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Ranking	Export Destination	2023(KG)	2024(KG)	2025(KG)	2023(USD)	2024(USD)	2025 (USD)
0	Global	26,378,411	22,699,145	23,674,358	170,326,934	152,499,731	162,771,726
1	Argentina	11,145,338	7,585,393	8,302,034	51,873,309	37,208,188	37,235,886
2	Paraguay	4,455,281	4,996,817	4,975,369	14,938,941	15,836,152	15,167,977
3	USA	3,534,560	3,462,082	3,225,434	35,576,868	33,232,822	36,455,948
4	Uruguay	1,214,185	1,187,989	1,631,567	4,317,538	4,597,772	5,138,466
5	Germany	928,335	883,972	779,947	7,886,561	7,799,125	7,704,825
6	Chile	377,352	367,695	592,207	6,119,261	5,572,831	5,962,278
7	Bolivia	797,393	659,843	515,913	3,607,042	2,716,276	2,178,891
8	France	686,820	684,762	480,437	7,639,124	8,245,585	13,490,145
9	Mexico	525,527	527,840	479,162	5,698,335	5,644,026	5,177,837
10	Colombia	339,566	287,940	335,759	4,855,570	4,634,349	4,754,865

(Note: Table data sorted by weight for 2025; source: <http://comexstat.mdic.gov.br/en/geral>)

Conclusions ////

As one of the founding members of BRICS and a founding signatory of the Southern Common Market (Mercosur), Brazil stands as Latin America's largest country by land area, most populous nation (with approximately 200 million people), and one of the region's most robust economies. Its industrial strength has long rivaled Mexico's for supremacy in Latin America, making it a crucial barometer for the region's market economy. Its slightest shifts can ripple through neighboring economies in Central and South America, including Argentina, Chile, Peru, Colombia, Panama, Paraguay, etc. Brazil remains a crucial pillar supporting strategic industrial development in South America. This is due to its abundant iron ore reserves and mature manufacturing sectors, including automotive, aerospace, steel, and shipbuilding. Looking at Brazil's top fastener import partners in 2025, besides China, which holds a competitive edge in average pricing, many are nations specializing in supplying mid-to-high-end fastener products—such as Italy, Japan, the United States, Germany, and Taiwan. For manufacturers primarily focused on high-precision, specialized components, or mid-to-high-end industrial fasteners, these countries may also warrant inclusion in future product marketing expansion and market development strategies. ■



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