

2026 Update of Large Heavy Machinery Fastener Demand in China

2026年中国大型重型机械紧固件需求

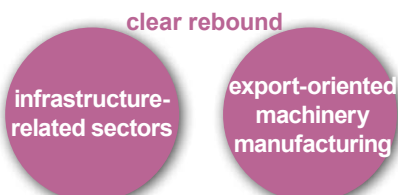
Introduction

China remains the world's largest manufacturing nation and one of the biggest consumers of industrial fasteners. In 2026, demand for large heavy machinery fasteners in China is being reshaped by four major forces: infrastructure expansion, recovery in construction machinery sales, industrial automation, and the global expansion of Chinese heavy equipment manufacturers.

Fasteners are among the most critical components in heavy machinery systems. Excavators, cranes, mining trucks, bulldozers, wind turbine installation equipment, tunnel boring machines, and large agricultural machinery all depend on high-strength bolts, nuts, studs, washers, and locking systems to ensure structural integrity and operational safety. In heavy machinery, fastener failure can result in catastrophic downtime, safety incidents, or complete equipment failure.

China's heavy machinery industry entered a cyclical slowdown between 2022 and 2024 due to weakness in the property market and slower domestic construction activity. However, **2025 and early 2026 show a clear rebound, especially in infrastructure-related sectors and export-oriented machinery manufacturing. This recovery is directly increasing demand for industrial fasteners, especially large-diameter, high-tensile products** used in heavy equipment assembly.

China's heavy machinery industry in 2025-2026



According to recent industry estimates, the China construction equipment market is expected to grow from approximately USD 56.18 billion in 2025 to USD 59.62 billion in 2026, with further long-term growth projected through 2031. Meanwhile, China's industrial fasteners market generated around USD 22.18 billion in 2025 and is forecast to continue growing strongly through 2033.

Overview of China's Heavy Machinery Industry in 2026

China's heavy machinery industry is recovering after several difficult years caused by property sector weakness and uneven infrastructure spending. The recovery is not driven by residential construction, but by state-backed infrastructure projects, energy investments, industrial upgrade, and export growth.

The China Machinery Industry Federation reported that major machinery companies generated approximately 33.2 trillion yuan (4.9 trillion USD) in operating revenue in 2025, representing 6% year-on-year growth. Total industry profits increased by 5.9%.

Construction machinery demand has also improved significantly. Excavator sales, which are widely viewed as a key indicator of heavy construction activity in China, surged strongly during 2025 and early 2026.

According to industry data released by the China Construction Machinery Association:

- China's excavator sales increased 17% in 2025.
- March 2026 excavator sales reached nearly a four-year high.
- April 2026 excavator sales increased nearly 30% year-on-year.
- Domestic excavator sales in April 2026 rose 34.9% year-on-year.

This recovery matters directly to the fastener industry because excavators, cranes, and earthmoving equipment consume large quantities of high-strength fasteners. Large crawler excavators may contain tens of thousands of fasteners in their different parts.

Size of the Chinese Industrial Fastener Market

China is already the largest producer and exporter of industrial fasteners globally. The market includes standard fasteners, automotive fasteners, aerospace-grade fasteners, and heavy industrial fasteners. Large heavy machinery fasteners represent a specialized subset of the broader industrial fastener market.

According to Grand View Research, **the China industrial fasteners market generated approximately USD 22.18 billion in revenue in 2025 and is expected to reach USD 38.56 billion by 2033, representing a CAGR of 7.3% from 2026 to 2033.**

Other industry estimates suggest similar growth trajectories:

- China industrial fasteners market projected to grow from USD 12.24 billion in 2024 to USD 22.79 billion by 2032.
- Global industrial fasteners market estimated at USD 92.13 billion in 2026.
- Global industrial fasteners market forecast to reach USD 136.95 billion by 2034.

Key Demand Drivers in 2026

Infrastructure remains the single biggest driver of heavy machinery fastener demand in China.

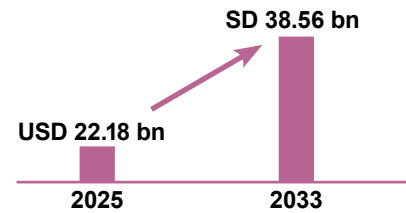
Between 2024 and 2026, China significantly increased investment across nearly all major infrastructure sectors as part of its strategy to stabilize economic growth and accelerate industrial modernization. Railway and high-speed rail investment continued expanding, with China's high-speed rail network surpassing 50,000 km by the end of 2025, compared with approximately 45,000 km in 2024 — representing growth of roughly 11% in network length within two years. China State Railway planned annual railway investment of approximately RMB 520 billion (USD 75 billion) for 2025–2026 projects, while fixed-asset railway investment in the first months of 2026 increased about 3.2% year-on-year.

Investment in water systems and underground utility renewal also accelerated sharply. According to Reuters, China approved approximately RMB 295 billion (USD 42.2 billion) in major infrastructure spending entering 2026, including RMB 220 billion dedicated to 281 national infrastructure and underground pipeline projects. In addition, China allocated more than RMB 75 billion for ecological protection and carbon-reduction infrastructure, including water management systems and environmental engineering projects.

Renewable energy infrastructure experienced some of the fastest growth among all infrastructure sectors. China's green energy and hydropower engagement increased from approximately USD 12.3 billion in 2024 to USD 21.4 billion in 2025, representing growth of nearly 74% year-on-year. Chinese investment specifically in green energy projects increased from USD 1.5 billion in 2024 to USD 5.9 billion in 2025 — an increase of almost 293%. During the same period, China's total installed renewable energy capacity exceeded 1,600 GW for the first time, surpassing fossil fuel generation capacity.

Urban redevelopment and logistics infrastructure also remained key priorities. China's overall infrastructure investment market is forecast to grow at approximately 4.5% year-on-year between 2025 and 2026, supported by investment in transportation corridors, smart logistics facilities, utility modernization, and urban renewal programs. Transportation infrastructure remained the largest segment of China's infrastructure market in 2025, while ports and logistics facilities continued expanding as China strengthened export capacity and Belt and Road connectivity. Reuters reported that Belt

Revenue Generated in China's Industrial Fasteners Market



and Road-linked infrastructure deals reached approximately USD 213 billion in 2025, up about 75% from the previous year, supporting continued expansion in ports, railways, and logistics corridors.

Last Word

China's large heavy machinery fastener market is entering 2026 with strong momentum, supported by accelerating infrastructure investment, recovery in construction equipment demand, expansion of renewable energy projects, and rising exports of Chinese heavy machinery. Government-backed spending in railways, underground utilities, water systems, logistics corridors, and green energy infrastructure is directly increasing the production and utilization of excavators, cranes, mining equipment, tunnel boring machines, and other heavy industrial systems that rely extensively on high-strength fastening components. As machinery becomes larger, more automated, and more export-oriented, demand is shifting toward premium fastening solutions with higher tensile strength, corrosion resistance, fatigue performance, and international certification standards.

At the same time, the Chinese fastener industry is undergoing structural transformation. Competition is gradually moving away from low-cost commodity products toward higher-value engineered fastening systems designed for critical load-bearing applications. **Manufacturers capable of supplying large-diameter structural bolts, precision-machined fasteners, and advanced coating technologies are expected to benefit most from the next phase of industrial growth.** Although challenges such as trade tensions, raw material volatility, and weakness in the property sector remain important risks, the long-term outlook for heavy machinery fastener demand in China remains positive as infrastructure modernization and industrial upgrade continue to reshape the country's manufacturing landscape. □

¹ <https://www.mordorintelligence.com/industry-reports/china-construction-equipment-market>

² <https://www.grandviewresearch.com/horizon/outlook/industrial-fasteners-market/china>

³ <https://www.chinadaily.com.cn/a/202602/06/WS69854bc2a310d6866eb37d7d.html>

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⁶ <https://www.grandviewresearch.com/horizon/outlook/industrial-fasteners-market/china>

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⁸ <https://www.mordorintelligence.com/industry-reports/global-industrial-fasteners-market>

⁹ <https://www.fortunebusinessinsights.com/industrial-fasteners-market-102732>

¹⁰ <https://www.facebook.com/PDChinaBusiness/posts/chinas-railway-construction-made-steady-progress-in-the-first-four-months-of-202/1314229670822703/>

¹¹ <https://www.reuters.com/world/asia-pacific/china-issues-early-2026-investment-plan-two-major-projects-worth-42-billion-2025-12-31/>

¹² <https://greenfdc.org/china-belt-and-road-initiative-bri-investment-report-2025/>

¹³ <https://www.technavio.com/report/infrastructure-market-industry-analysis>

