



# China's Fastener Trade in Early 2026: Market Reshaped by Volume Growth & Stable Prices

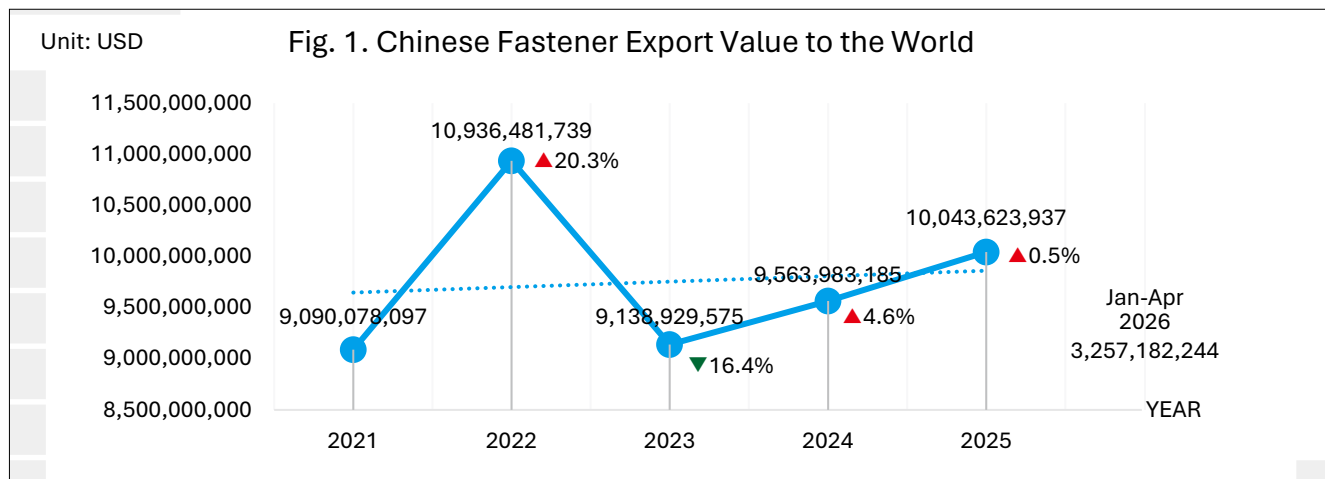
## 2026年1至4月中国紧固件进出口结构转型： 量增价稳下的市场重塑

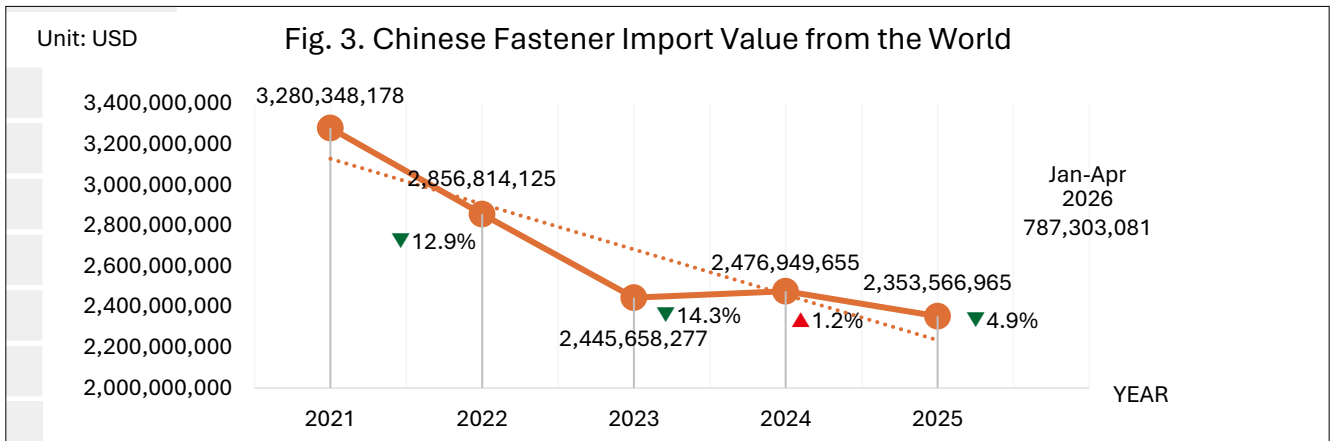
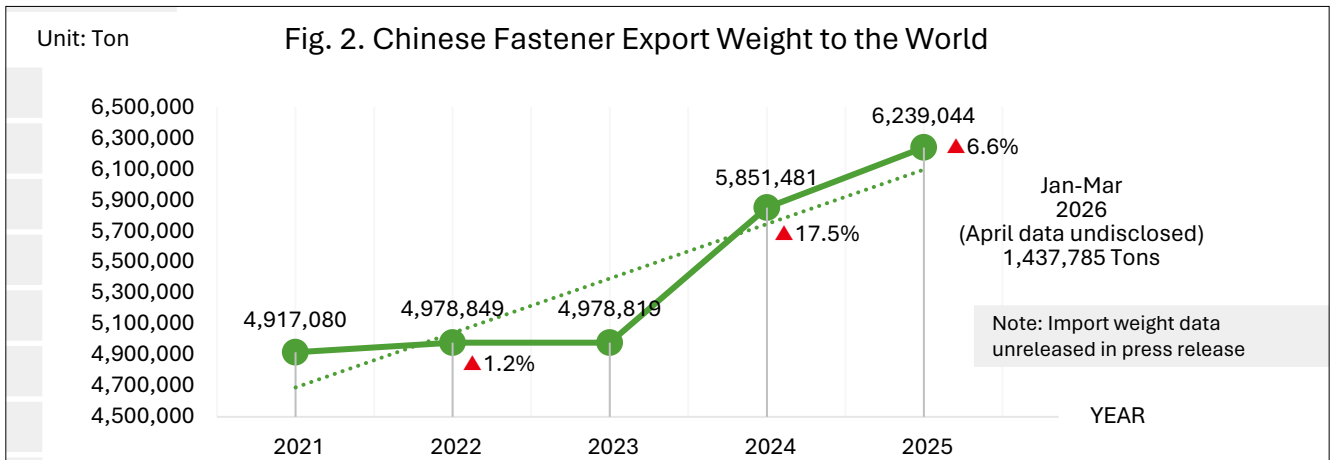
### Export Scale Rebounds with Fluctuations: Industrial Resilience Emerges

In value terms, China's fastener exports grew strongly in 2021 and 2022, then eased in 2023 before stabilizing gradually in 2024 and 2025 (Fig. 1). In 2025, China's fastener exports reached about US\$10.04 billion, narrowing the gap with the 2022 peak of US\$10.93 billion to just 8.1%. Meanwhile, China's fastener imports were about US\$2.35 billion (Fig. 3), leaving a trade surplus of roughly US\$7.6 billion versus exports, underscoring China's continued dominance as a global fastener supplier. Export value for the first 4 months of 2026 reached US\$3.25 billion, a solid performance. Annualized proportionally, the full year may still face challenges, but there remains a chance to sustain growth momentum. At the same time, export weight has shown a clearer upward trend (Fig. 2). Over the past 5 years, it has risen by 26.8%, indicating that while export volume hit a record high in 2025, value growth over the same period was relatively limited at 10.4%, reflecting pressure on unit prices and intensifying market competition.

### Imports Continue to Decline: A Clear Trend of Domestic Substitution

China's fastener imports have been on a long-term downward trend (Fig. 3). They fell to US\$2.35 billion in 2025, down 28.2% over the past 5 years. The overall decline is significant. Import value in the first 4 months of 2026 was US\$787 million, a steady performance. Annualized proportionally, it could be about 0.3% higher than 2025, but it would still remain within a declining range, indicating that China's domestic supply capability continues to strengthen. Even so, some high-end products still rely on imports, showing that there is still room for technological upgrade.





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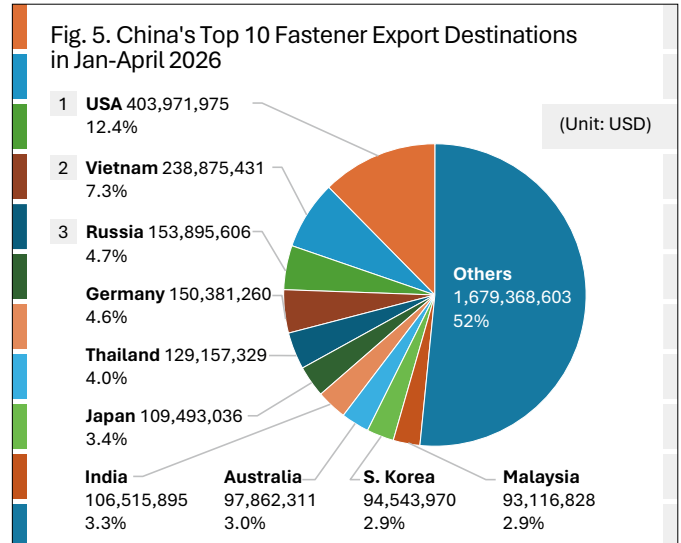
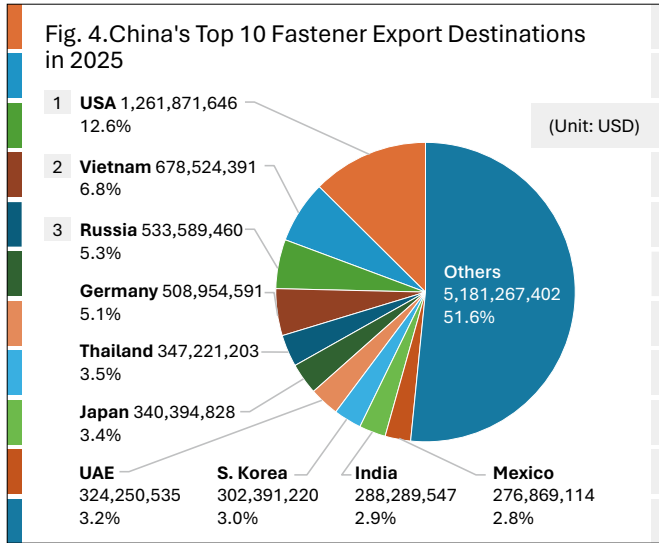
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## Export Market Structure: Diversified, Yet the U.S. Remains Central

Among China's top 10 fastener export destinations in 2025 (Fig. 4), the U.S. remained firmly in the first place, with export value reaching US\$1.26 billion, or 12.6% of total exports, well above the single-digit shares of other destinations. This suggests that even amid ongoing China-U.S. trade frictions, U.S. manufacturers still rely heavily on Chinese fastener supply. The reasons include insufficient domestic U.S. capacity, high production costs, and China's difficult-to-replace supply chain cost competitiveness. More importantly, Southeast Asian and other emerging markets are rising. For example, China exported US\$678 million to Vietnam and US\$347 million to Thailand, while India and Mexico also appeared among the top 10 destinations. This indicates that **China's exports are shifting from dependence on the U.S. market toward a more diversified, multi-region structure.**



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Fig. 6. Export Value of China's Fastener Categories in 2025

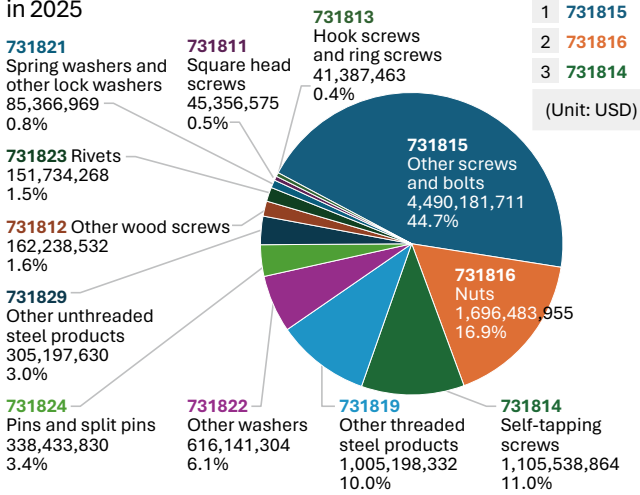


Fig. 7. Export Value of China's Fastener Categories in Jan-April 2026

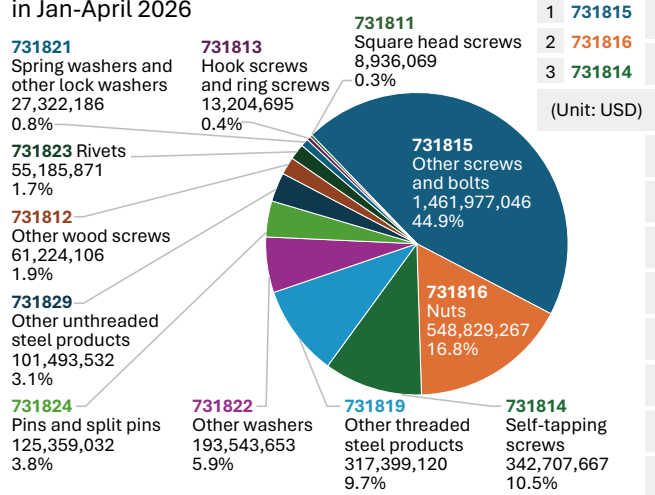


Fig. 8. Import Value of China's Fastener Categories in 2025

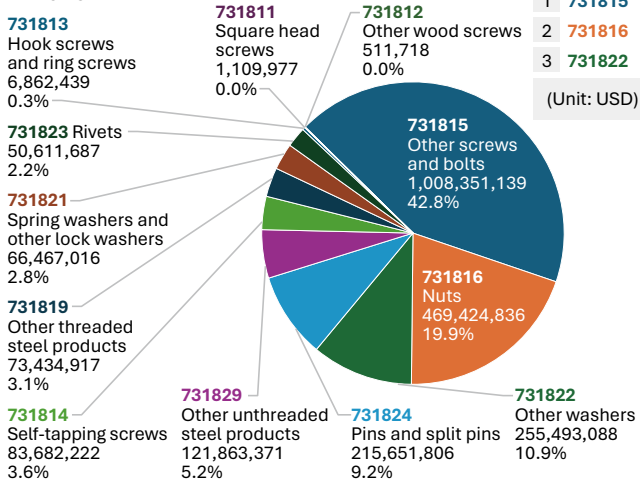
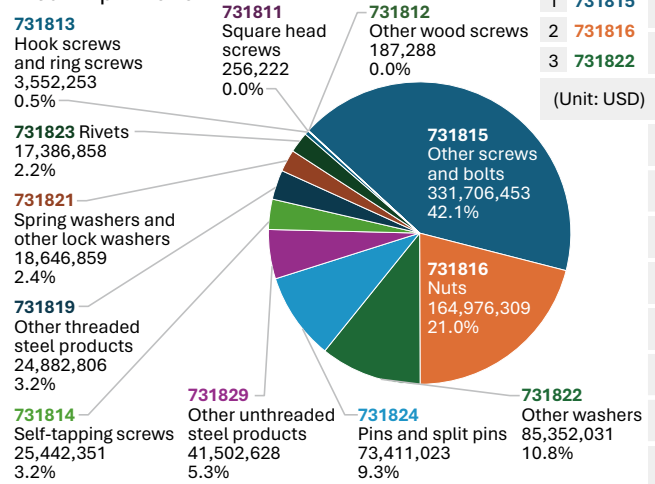


Fig. 9. Import Value of China's Fastener Categories in Jan-April 2026



## Product Structure Shows Standard Parts Still Dominate

China's fastener industry still competes mainly through mass-standard parts, industrial general-purpose parts, and construction and machinery fasteners. Export product category analysis (Fig. 6) shows that "731815 Other screws and bolts" alone accounted for nearly half of total exports, with 2025 export value at US\$4.49 billion, or 44.7% of total exports. It was followed by nuts (US\$1.69 billion, 16.9%), self-tapping screws (US\$1.10 billion, 11.0%), and other threaded articles (US\$1.00 billion, 10.0%). The January–April 2026 data (Fig. 7) show a similar distribution.

## China Still Has a High-End Gap

China's fastener imports are concentrated on high-quality or specialized products that fill domestic technology gaps. High-end specialty fasteners remain an important direction for China's industrial upgrade in the future. Although total import value has declined, the main import categories (Fig. 8) are also concentrated on 731815 Other screws and bolts (US\$1.01 billion, 42.8%), high-end nuts (US\$469 million, 19.9%), precision washers (US\$255 million, 10.9%), and pin products (US\$215 million, 9.2%). The January–April 2026 data (Fig. 9) show a similar distribution.

## From Scale Advantage to Value Competition

China's fastener industry is in a transitional phase. Exports are still driven by volume, but price pressure is increasing. The market structure is shifting from concentration to diversification, and falling imports reflect deepening domestic substitution. Future competition will move from "scale advantage" toward "technology and value-added capability," especially in high-end applications and precision manufacturing.

For Chinese fastener producers, the key strategic priorities going forward are to pursue high value-added products, diversified markets, and digitalization at the same time. Standard products should still be expanded, but the business cannot



rely only on standard products. Low-price markets can be defended, but they cannot be the basis for survival. China's export volume has continued to rise while imports have steadily fallen, showing that scale advantages remain in place. However, the next stage of competition should focus on products, clients, and improved operational efficiency. For the large number of small and medium-sized local enterprises, production lines can be upgraded step by step; there is no need to build a fully smart factory all at once, but digitalizing data should begin now.

Under the pressures of geopolitics, tariffs, logistics, and raw material fluctuations, clients are placing greater emphasis on supply stability and delivery certainty. Chinese companies can use product segmentation and customer stratification strategies to manage bulk products and high-margin customized products separately, avoiding the competition of internal resources. At the same time, they can strengthen supply-chain resilience by building multi-location backup supply, safety stock of key raw materials, backup tooling for critical molds, and regional delivery centers.

Overall, Chinese fastener producers still hold a strong global supply advantage. But **in the future, the companies that truly stand out will not simply be the largest in output. They will be the ones that integrate manufacturing, certification, regional service, and digital management capabilities into one competitive system.** ■

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