

The Americas Fastener Market in 2025-H1 2026

2025-2026 上半年 美洲紧固件市场观察

U.S. imports contracted sharply in 2025, Canada became more import-dependent, Mexico retained one of the deepest fastener trade deficits in the hemisphere, and Brazil remained the anchor of South American demand. By the first half of 2026, tariffs and sourcing shifts were changing where fasteners came from more rapidly than they were changing the underlying need for them.

The Americas entered 2025 as anything but a unified fastener market. The United States combined a large domestic manufacturing base with heavy imports and substantial exports. Canada was deeply integrated into the U.S. industrial system but structurally dependent on imported fasteners. Mexico had developed into a manufacturing powerhouse while remaining a surprisingly large net importer of fastening products. Farther south, Brazil supported a significant domestic industry but still bought far more fasteners from abroad than it sold overseas, while most of Central and South America remained overwhelmingly import-dependent.

That distinction became even more important through the first half of 2026. Trade policy changed quickly, especially in North America. The U.S. raised tariffs on steel and aluminium products and derivatives from 25% to 50% in June 2025 and subsequently modified the regime again in April and June 2026. Canada, meanwhile, imposed a 25% tariff on a broad group of steel derivative products from December 26, 2025, explicitly covering every major HS 7318 fastener subheading. The result has not been a straightforward contraction in fastener consumption. It has been a restructuring of procurement.

United States: Imports Fall, but the Market Does Not Disappear

The clearest change in the Americas occurred in the United States. U.S. HS 7318 imports fell from US\$6.617 billion in 2024 to US\$6.038 billion in 2025, a decline of approximately 8.8%. Exports moved far less, slipping from US\$5.682 billion to US\$5.628 billion, or just under 1%. The resulting 2025 fastener trade deficit was therefore only about US\$410 million.

This is an important structural difference between the United States and most other markets in the hemisphere. America is a major importer, but it is simultaneously a very large fastener producer and exporter.

Asia still dominated the supply side. Taiwan supplied US\$1.928 billion of U.S. HS 7318 imports in 2025 and China another US\$1.042 billion. Together they represented approximately 49% of U.S. import value. Japan followed with US\$574 million. Yet the direction of travel changed. Imports from Taiwan fell from US\$2.171 billion in 2024 to US\$1.928 billion in 2025, while China declined from US\$1.187 billion to US\$1.042 billion. Germany fell from US\$386 million to US\$322 million. In contrast, India increased from US\$237 million to US\$270 million, roughly 14%, and Italy from US\$258 million to US\$281 million, about 9%. **That looks less like simple demand destruction and more like procurement rebalancing.**

The export side reinforces the point. Mexico remained the leading destination for U.S. fasteners at US\$1.858 billion, followed by Canada at US\$1.275 billion. Together, the two USMCA partners absorbed almost 56% of all U.S. HS 7318 exports in 2025. Meanwhile, exports to Brazil rose from US\$131 million to US\$157 million, France from US\$135 million to US\$175 million, and the UK from US\$186 million to US\$216 million. Thus, even while U.S. imports were contracting, American fastener manufacturers were widening their exposure to markets beyond their two traditional North American customers.

H1 2026: A Changed Import Mix, Not an Empty Market

For HS 731815, the largest threaded screw-and-bolt grouping, U.S. imports reached approximately US\$1.2 billion during January-June 2026. June alone recorded US\$214.5 million of imports and US\$230.7 million of exports, producing a small monthly surplus in this particular subheading. Taiwan supplied US\$41.7 million in June, China US\$36.4 million and Japan US\$23.0 million. By contrast, U.S.

exports of these products to Mexico reached US\$88.2 million and to Canada US\$52.6 million in the month. In June, self-tapping screws under HS 731814 added another US\$73.6 million of imports, of which Taiwan alone supplied US\$57.6 million, while nuts under HS 731816 accounted for US\$102.4 million. Those three categories therefore generated at least US\$390.5 million of U.S. fastener imports in June 2026 alone, without counting the remaining HS 7318 subheadings.

The numbers do not support the idea that imported fasteners were being engineered out of the U.S. market. They show that the source mix and economics of importing were changing. The demand side remains substantial. MarketsandMarkets valued the U.S. industrial-fastener market at approximately US\$16.34 billion in 2025, while Grand View Research used a broader methodology and estimated US\$18.24 billion. Grand View expects the figure to reach approximately US\$18.77 billion in 2026. The difference between these estimates itself illustrates why market revenue should be treated as a consumption proxy rather than an official customs statistic. The central conclusion, however, is consistent: U.S. fastener demand remained many times larger than the net value of its fastener trade deficit.

Canada: Stable Imports, Weaker Exports and Rising Import Dependence

Canada followed a different path. Its HS 7318 imports increased modestly from approximately US\$1.936 billion in 2024 to US\$1.981 billion in 2025, a rise of about 2.3%. Exports, however, fell sharply from roughly US\$652 million to US\$566 million, a decline of more than 13%. Canada therefore ran an estimated HS 7318 trade deficit of approximately US\$1.415 billion in 2025, with imports running around 3.5 times exports.

The U.S. remained Canada's most important supplier, but its position weakened. Canadian purchases from the United States fell from about US\$910 million in 2024 to US\$883 million in 2025. China moved in the opposite direction, rising from US\$282 million to US\$322 million, while imports from Italy increased to US\$50 million and India to approximately US\$37 million.

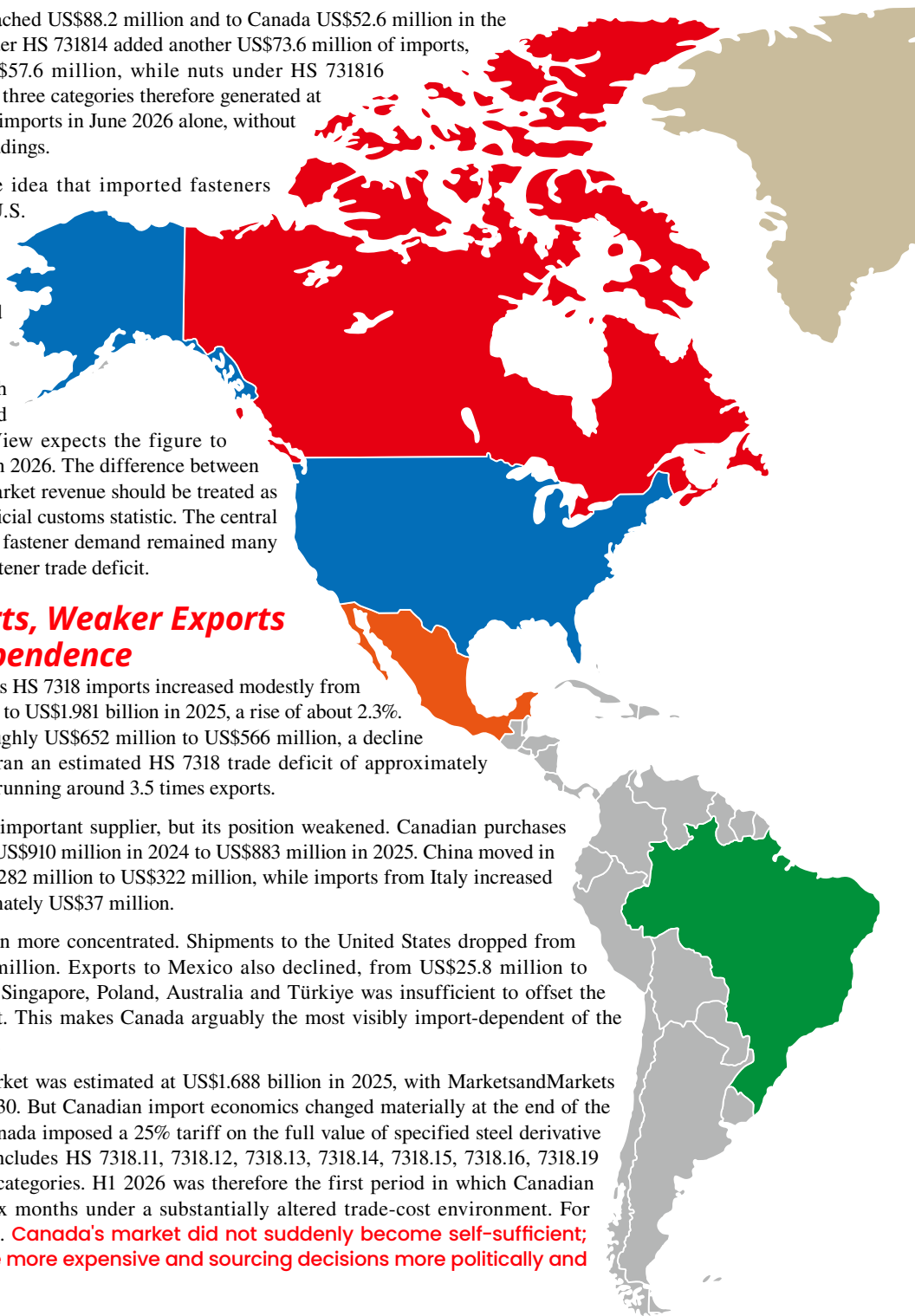
Canada's export weakness was even more concentrated. Shipments to the United States dropped from roughly US\$528 million to US\$438 million. Exports to Mexico also declined, from US\$25.8 million to US\$19.1 million. Growth in Germany, Singapore, Poland, Australia and Türkiye was insufficient to offset the loss in Canada's dominant U.S. market. This makes Canada arguably the most visibly import-dependent of the three large North American economies.

Its domestic industrial-fastener market was estimated at US\$1.688 billion in 2025, with MarketsandMarkets forecasting a 2.76% CAGR through 2030. But Canadian import economics changed materially at the end of the year. Effective December 26, 2025, Canada imposed a 25% tariff on the full value of specified steel derivative products. The official list explicitly includes HS 7318.11, 7318.12, 7318.13, 7318.14, 7318.15, 7318.16, 7318.19 and the major non-threaded HS 7318 categories. H1 2026 was therefore the first period in which Canadian fastener buyers operated for a full six months under a substantially altered trade-cost environment. For suppliers, the implication is significant. **Canada's market did not suddenly become self-sufficient; instead, imported supply became more expensive and sourcing decisions more politically and commercially complex.**

Mexico: A Manufacturing Powerhouse That Still Imports Fasteners on a Massive Scale

Mexico is perhaps the most interesting contradiction in the Americas. It is one of the world's most important manufacturing platforms for vehicles, appliances, electronics, aerospace components and industrial equipment. Yet it is also an enormous net importer of fasteners.

Data México recorded US\$2.88 billion of HS 7318 purchases and only US\$317 million of sales in 2024. A commercial customs-data compilation subsequently reports Mexican HS 7318 imports of approximately US\$3.186 billion in 2025. Because the latter comes from a different trade-data system, the apparent increase should be treated directionally rather than as a perfectly harmonized year-on-year comparison.



The Inter-American Development Bank-based dataset provides another useful checkpoint. In just January–March 2025, Mexico imported US\$687.5 million of HS 7318 products while exporting US\$72.9 million. Mexico alone represented the largest share of fastener trade among the 15 Latin American economies covered in the study.

By June 2026 the imbalance remained striking. Official Data México figures show US\$275 million of HS 7318 international purchases in June 2026 against only US\$28.8 million of international sales, creating a monthly trade deficit of approximately US\$246 million. Imports were therefore roughly 9.5 times exports. Second-quarter exports totaled US\$82.8 million, led by Tamaulipas, Coahuila and Nuevo León.

This is not evidence of a weak Mexican industrial economy. It demonstrates the opposite. Mexico's factories consume fasteners at a scale that domestic fastener manufacturing does not fully satisfy. Moreover, large amounts of imported fasteners are embedded into automobiles, machinery, electronics and other finished products that are subsequently exported. Looking only at direct HS 7318 exports therefore understates the importance of fasteners to Mexico's export economy.

The country's industrial-fastener market was estimated at approximately US\$3.14 billion in 2025, with projected CAGR of 3.34% through 2030. **For international fastener producers, Mexico consequently plays two roles at once: it is an end market and a manufacturing gateway into North American supply chains.** That dual role is likely to become even more important as U.S. tariffs increase incentives to reconsider how Asian and European products enter North American manufacturing networks.

Brazil: South America's Anchor Market Remains Structurally Import-Heavy

Brazil is the only South American economy with enough scale to alter the regional fastener picture materially. ComexStat-based data show that Brazil imported 207,693 tonnes of HS 7318 products worth US\$966.8 million during January–October 2025. Over the same ten months, exports were only 19,681 tonnes worth US\$133.9 million. Imports therefore exceeded exports by roughly 7.2 to 1 by value, producing a net import position of approximately US\$833 million before the final two months of the year.

China was Brazil's largest supplier, accounting for US\$267 million of import value during January–October, followed by Italy at US\$83.5 million, Japan at US\$77.7 million, the United States at US\$154.7 million and Germany at US\$81.9 million. China was even more dominant by physical volume, accounting for roughly 65% according to the source analysis.

Brazil's exports were mainly regional. Argentina bought US\$32.4 million during the ten-month period, Paraguay US\$12.9 million and Uruguay US\$3.7 million, while the United States purchased US\$29.4 million. This creates a fundamentally different market structure from the United States. Brazil possesses domestic manufacturing capability and some export strength, particularly within Mercosur, but imports still supply a large part of industrial demand.



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MarketsandMarkets estimated Brazil's 2025 industrial-fastener market at approximately US\$2.091 billion, about 65% of South America's US\$3.237 billion market under the same methodology. Argentina added approximately US\$620 million and the rest of South America about US\$525 million. **Brazil therefore remains the obvious first market for any supplier treating South America strategically rather than opportunistically.**

The Rest of South America: Smaller Markets, but Heavy Import Dependence

The regional data reveal an important pattern beyond Brazil. In the first three to four months of 2025, Argentina imported approximately US\$79.0 million of HS 7318 products, Chile US\$68.8 million, Peru US\$42.1 million and Colombia US\$34.1 million. Their exports were only fractions of those amounts.

The broader 15-country Latin American dataset is even more revealing. Those economies imported at least US\$4.86 billion of HS 7318 fasteners in 2024 while exporting only about US\$477.5 million. During the available first three to four months of 2025, the same group had already imported approximately US\$1.34 billion, against only about US\$133 million of exports. In both periods, imports were around ten times exports. That ten-to-one relationship is one of the most important statistics in the Americas fastener business. It means the commercial opportunity in Latin America is not primarily about defeating a large regional export industry. **In many markets it is about competing against other foreign suppliers for demand that structurally cannot be met by local production.**

Central America and the Caribbean: Small Individually, Import-Dependent Collectively

Central American fastener markets are far smaller than Mexico or Brazil, but the same trade pattern becomes even more pronounced. During January–March 2025, Honduras imported approximately US\$5.08 million of HS 7318 products while exporting only about US\$75,000. El Salvador imported US\$4.93 million and exported roughly US\$571,000. Guatemala imported US\$3.26 million in January alone versus exports of only US\$96,000. Costa Rica also remained a clear net importer.

Individual market size is limited, so treating every Central American country as a standalone strategic market can be inefficient. **Their relevance increases when approached through regional distributors, construction groups, industrial suppliers and manufacturing clusters.** ■

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