

# The Global Fastener Machinery Market in 2025

## /// Asian Scale, Western Automation and the Changing Economics of Fastener Production

Several studies published in 2026 place the global cold-heading-machine segment—the core of industrial fastener forming—at approximately US\$4 billion in 2025 and US\$4.2 billion in 2026. Other estimates range from about US\$3.1 billion to US\$4.3 billion, mainly because researchers include different machine types and aftermarket activities.

## 2025全球紧固件机械市场剖析

### /// Asia-Pacific: the Centre of Volume and Capacity Growth

Asia-Pacific remained the largest and most consequential regional market in 2025. It combines the world's deepest fastener-manufacturing clusters with major machinery builders in China, Japan, Taiwan and South Korea. At the same time, India and Southeast Asia are becoming increasingly important machinery buyers.



### Scale Changes the Competitive Landscape

China is the market's scale leader and its most disruptive exporter. Its share of global metalworking-machine exports rose from 8% in 2016 to approximately 23% in 2025, when it overtook Germany as the world's largest exporter. The total value of China's machine imports and exports reached US\$33.48 billion in 2025, an increase of 5% year on year.

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For the fastener sector, the implications are significant. Chinese builders can offer cold headers, nut formers, thread rollers and auxiliary machines at prices that put intense pressure on Japanese, Taiwanese and European suppliers. They are also moving beyond basic mechanical equipment by introducing CNC control, servo-driven systems, automatic feeding, monitoring and increasingly sophisticated multi-station machines.

However, a low purchase price does not automatically produce a low cost per accepted part. Buyers manufacturing safety-critical automotive, aerospace or energy fasteners must also consider machine repeatability, tooling life, process documentation, spare-parts availability and after-sales response. This is dividing China's offering into two levels: standard machinery competing primarily on price and delivery, and a smaller but developing group of builders attempting to enter high-specification applications.



### The Strategic Middle Position

Taiwan occupies a particularly valuable position between Chinese price competition and Japanese or European premium engineering. It combines an established fastener cluster, experienced machinery builders, strong component suppliers and generally lower investment costs than the top Japanese and European brands.

**In the first half of 2026, Taiwan exported US\$978 million of machines, down 3.1% from the previous year. Exports of key machine components, however, increased by 11.4% to US\$814 million.** Metal-forming machine exports contributed US\$27.2 million in June 2026 alone.

The stronger component performance matters. Taiwan is not merely exporting complete machines; it is embedded in the international supply chain for controls, feeding systems, precision assemblies and automation components. Its machinery builders are well positioned to serve medium-sized fastener manufacturers that need dependable multi-station equipment and customisation but cannot justify the highest European or Japanese prices.



### India: the Fastest-growing Major Opportunity

India is becoming one of the world's most attractive machinery-demand markets. In FY2024/25, **Indian machine production increased by 7% to ₹145.66 billion, equivalent to approximately US\$1.72 billion**, while consumption surged by 17% to ₹317.81 billion, or approximately US\$3.76 billion.

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Imports reached ₹186.86 billion, equivalent to approximately US\$2.21 billion, compared with exports of only ₹14.72 billion, or approximately US\$174 million. India ranked ninth globally in machine production but fourth in consumption. The expansion continued in FY2025/26. Domestic machine production reached approximately ₹164.78 billion, equivalent to around US\$1.87 billion, representing growth of about 13%. Order bookings rose approximately 20% to ₹161.76 billion, or about US\$1.83 billion.

Total machine consumption exceeded ₹350 billion, approximately US\$3.97 billion, for the first time. Imports surpassed ₹200 billion, equivalent to more than US\$2.27 billion, and continued to account for approximately 60%–65% of the Indian market.

This gap presents a significant opportunity for overseas fastener-machinery suppliers. However, it should not be regarded as a permanent entitlement. Indian manufacturers are investing in more specialised, locally produced and higher-precision machinery. Foreign suppliers relying solely on imported machines may eventually be squeezed between lower-cost Asian competitors and increasingly capable Indian builders.

Local assembly, technical partnerships, operator training, spare-parts availability and application engineering will therefore become increasingly important for machinery suppliers seeking long-term growth in India.



### Precision and International Demand

Japan represents the higher-precision end of the Asian market. **Japanese machine orders reached ¥1.604 trillion (US\$10.72 billion) in 2025, up 8% and returning to annual growth for the first time in three years.** Domestic orders declined marginally by 0.2%, but overseas orders rose 11.5% to ¥1.163 trillion (US\$7.78 billion). In January 2026, total orders were another 25.3% above January 2025, largely supported by foreign demand.

Japanese fastener-machinery builders remain strongest where customers require production stability, long working life, complex multi-die forming and high process repeatability. Their weakness is usually not technical performance but capital cost. They must increasingly prove that reliability, lower downtime and longer machine life justify the premium over improving Chinese and Taiwanese alternatives.





## Weaker Volumes but Stronger Specialisation

Europe experienced another difficult investment year. Final CECIMO estimates indicate that **European machine production declined approximately 6.6% to €23.5 billion in 2025. Europe's share of world production fell to 30.8%**, compared with 33.4% in 2023. Regional consumption declined 3.7%, exports fell 8.8%, and imports decreased 4.2%. CECIMO expects a modest improvement in production, consumption and orders during 2026, but describes the recovery as fragile.

The weakness was not caused by a shortage of engineering capability. European builders faced subdued industrial investment, expensive financing, automotive restructuring, trade uncertainty and intensifying Chinese competition. For fastener-machinery companies, this means that competing directly with Asian standard machines on purchase price is becoming an increasingly poor strategy.

Germany illustrates the problem. German machine production fell 8% to €13.6 billion in 2025. Exports declined 9%, domestic orders dropped 16%, and capacity utilisation averaged only 76%. New-machine investment remained weak, while service, rebuilding and retrofitting supported demand. Defence, aviation, medical technology and electronics performed better than the traditional automotive sector. For fastener machinery, German opportunities are therefore concentrated in complex and safety-critical components rather than mass-market standard screws. Customers continue to invest where machinery can deliver rapid changeovers, difficult part geometries, stable process capability, traceability and low defect rates.

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**Italy recorded a somewhat different pattern. Production of machine, robots and automation systems increased 1.5% to €6.42 billion in 2025**, while domestic consumption rose 20.5% to €4.47 billion. Exports, however, contracted 13.2%.



UCIMU expects Italian production to reach €6.59 billion in 2026, up 2.6%, with domestic consumption rising another 5.9%. Italy remains important because of its capabilities in metal forming, wire processing, secondary operations, automation and customised production systems. Its machinery companies can compete where the customer requires more than a standalone header—particularly integrated forming, handling, inspection and packaging lines.

Europe is also likely to generate a growing retrofit market. Fastener manufacturers are adding new controls, sensors, automatic loading, optical inspection and energy monitoring to machines that remain mechanically sound. This can raise productivity without requiring the capital expenditure of a completely new line. European regulation reinforces the trend. Modern machines increasingly need to record process conditions, rejects, output and energy use. Such information supports both production management and customers' growing demands for traceability and environmental data. Digital capability is becoming part of the machine itself, rather than an optional software package.

## /// North America: Automation Drives Investment

North America, led by the United States and Mexico, was one of the strongest machinery markets in 2025. US metalworking-machinery orders reached US\$5.74 billion, 22.5% above 2024. December orders hit a monthly record of US\$814.3 million. Momentum continued in 2026, with orders reaching US\$2.77 billion during the first five months—31.9% higher than in the corresponding period of 2025. Aerospace, defence, foreign direct investment and reshoring-related projects contributed to demand. For fastener manufacturers, the central North American issue is labour. Investments are increasingly justified not simply by output speed but by the operator hours, inspection stages, setup work and material movements eliminated. Demand consequently favours automatic wire handling, rapid tooling changes, robotic collection, in-line vision inspection, process monitoring and predictive maintenance.

**The United States remains attractive for premium European and Japanese machinery, but Taiwanese and selected Chinese suppliers are gaining consideration where investment cost is critical.** Tariffs and trade-policy uncertainty complicate purchasing decisions by raising the landed cost of some machines and components while simultaneously encouraging domestic manufacturing. Local spare-parts stocks and North American service engineers are becoming stronger competitive advantages.





Mexico should be considered separately. One commercial estimate valued its machine market at approximately US\$1.64 billion in 2025. The exact number is less important than Mexico's position as a production bridge between global suppliers and the United States. Automotive, appliance, aerospace and general-manufacturing clusters create demand for machinery that combines automotive-grade process capability with competitive operating costs.

### /// Latin America: Concentrated Rather Than Uniform Demand

Outside Mexico, Latin America remains fragmented. Brazil is the principal industrial market, supported by automotive, agricultural machinery, construction and energy applications. **Brazilian machinery and equipment exports totalled US\$13.8 billion in 2025.** Domestic investment weakened in 2026, however, as high interest rates affected capital spending and ABIMAQ reduced its forecast for 2026 machinery-sector sales to a decline of 2.3%.

Fastener-machinery demand is consequently concentrated among established manufacturers, exporters and multinational component groups. Financing options, Portuguese- or Spanish-language support and local technical representation are essential. Refurbished Japanese and European machines remain strong competitors because they provide proven capability at a lower initial price.

### /// Middle East and Africa: Localisation at an Early Stage

The Middle East and Africa account for a comparatively small share of global machinery sales, but their strategic relevance is increasing. Saudi Arabia, the UAE and Türkiye represent the clearest opportunities.

Saudi industrialisation is encouraging local production of construction, energy, transport and industrial components. In June 2025, the Kingdom issued 83 new industrial licences representing more than SR950 million in planned investment. During the same month, 58 factories with investment of approximately SR1.93 billion began production.

Because a large proportion of the region's fasteners are imported, local production is likely to begin with standard bolts, nuts, anchors and



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construction products before progressing toward more technically demanding grades. This favours modular production lines that can start at moderate capacity and expand later. Turnkey support—including machinery, tooling, training, quality systems and maintenance—is more valuable than selling an isolated machine.

Türkiye functions as both a manufacturing market and a bridge connecting Europe, Central Asia and the Middle East. Its machinery industry achieved record export value in 2025, although inflation, financing costs and weakness in major customer industries restrained domestic confidence. Türkiye's white-goods production, for example, fell 9% in 2025, while exports decreased 10%.

African demand remains more limited. Financing constraints, energy reliability and relatively short production runs make simple forming lines, used machinery, maintenance and equipment for construction fasteners more realistic opportunities than large, fully automated installations.

## /// Conclusion

The global fastener machinery market in 2025 was defined less by headline growth than by a fundamental change in how manufacturers evaluate machinery investment.

Asia continued to strengthen its role in global production capacity. China expanded its machinery exports, Japan benefited from rising overseas demand, Taiwan remained an important supplier of machinery and precision components, and India recorded strong growth in both production and consumption. Europe, meanwhile, faced weaker investment conditions but retained its strength in specialised, high-precision and technologically advanced equipment. North America experienced stronger demand, driven largely by automation, labour shortages, reshoring and investment in aerospace, defence and advanced manufacturing.

Across all regions, automation moved from being an optional upgrade to an economic necessity. Manufacturers are no longer assessing machines only by their maximum production speed. They are increasingly measuring performance through labour requirements, setup time, tooling consumption, scrap rates, energy use, uptime, inspection costs and the consistency of accepted output. This shift is widening the gap between standard and specialised machinery. Producers of conventional bolts, nuts and screws remain highly sensitive to machine price, production speed and delivery time. Manufacturers serving automotive, aerospace, medical, energy and other demanding sectors require much more: process stability, complex multi-station forming, traceability, automatic inspection and technical support.



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After-sales service has also become an essential part of the machinery offering. A technically capable machine can quickly lose its value if spare parts are unavailable, maintenance support is slow or local technicians cannot resolve production problems. Remote diagnostics, preventive maintenance, operator training and tooling support are therefore becoming important competitive differentiators. For fastener manufacturers, the most important investment question is no longer: “Which machine has the highest rated speed?” It is: “Which production system delivers the lowest sustainable cost per accepted part throughout its working life?” Answering that question requires manufacturers to look beyond the initial purchase price and calculate the full cost of ownership, including labour, tooling, changeovers, rejects, energy consumption, maintenance, downtime and quality failures. Machinery builders face the same pressure. Lower-cost suppliers must improve reliability, process control and international service. Premium suppliers must prove that their higher prices generate measurable savings, higher productivity or access to more demanding markets. Machines that are neither clearly cheaper nor demonstrably better will face the greatest competitive risk. The regional market did not move uniformly in 2025. Asia remained dominant, North America invested aggressively in automation, Europe concentrated on specialised technology, India expanded rapidly and emerging markets offered selective opportunities. However, one direction was common across the industry: the future of fastener manufacturing will not be determined by forming speed alone.

The next generation of competitive machinery will be integrated, automated, data-driven and supported throughout its operating life. The winners will be the systems that can convert wire into reliable, traceable and certified fasteners with fewer operators, lower energy consumption, less waste and greater production certainty. ■

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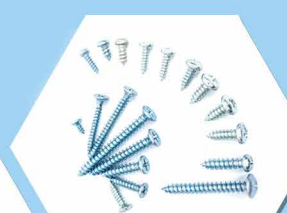


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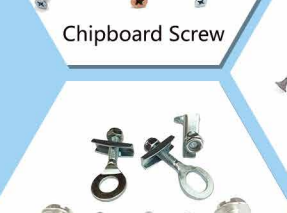
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