

Europe's Fastener Market in 2025 and H1 2026

Import Pressure, High-Value Exports and a Selective Recovery 2025-2026 上半欧洲紧固件市场走势

Europe remains one of the world's largest and most technologically advanced fastener markets, but its trade structure increasingly reflects two different competitive positions. The European Union imports large volumes of relatively lower-value fasteners, predominantly from Asia, while exporting considerably smaller volumes at substantially higher unit values. Demand conditions also remained uneven through 2025 and the first half of 2026, with automotive, commercial vehicles and aerospace showing stronger signals than construction and broad industrial activities.

For statistical consistency, the trade analysis uses EU-27 extra-EU data for CN 7318, covering screws, bolts, nuts, coach screws, screw hooks, rivets, cotters, cotter pins, washers and similar articles of iron or steel.

2025: € 6.58 Billion of Imports Against € 5.80 Billion of Exports

2025 EU Fastener Trade

Import:
€6.58 billion /
1.83 million tonnes
/ €3.59/kg

Trade Balance
-€778 million

Export:
€5.80 billion /
547,552 tonnes /
€10.59/kg

In 2025, EU extra-EU imports of CN 7318 fasteners reached approximately €6.58 billion and 1.83 million tonnes. Extra-EU exports reached €5.80 billion but only 547,552 tonnes. **The EU therefore recorded a fastener trade deficit of approximately €778 million.**

**Apparent consumption is calculated as domestic production plus imports minus exports. It estimates fasteners available to the EU market rather than measured end-user consumption.*

The most revealing figure is not the €778 million deficit but the difference in unit values. European exports averaged €10.59/kg compared with €3.59/kg for imports, meaning the average exported kilogram was valued at almost 2.95 times the average imported kilogram. This points to a segmented competitive model: high-volume standard fasteners remain exposed to international price competition, while European producers retain stronger positions in engineered, certified and application-specific products. The volume imbalance is also significant. Net extra-EU imports were about 1.28 million tonnes in 2025, equivalent to roughly 35.7% of estimated apparent consumption. Europe therefore remains dependent on external supply for a substantial share of physical fastener availability even while maintaining a high-value export base.

EU-27 Fastener Indicator	2025
Extra-EU imports	€6.58 billion
Import volume	1.83 million tonnes
Average import value	€3.59/kg
Extra-EU exports	€5.80 billion
Export volume	547,552 tonnes
Average export value	€10.59/kg
Trade balance	-€778 million
Reported production	2.312 million tonnes
Reported production value	€10.10 billion
Estimated apparent consumption*	approx. 3.59 million tonnes

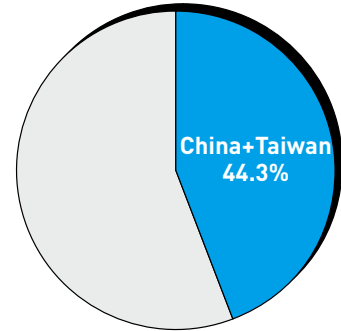
Asian Suppliers Strengthen Their Position

China was the EU's largest external fastener supplier in 2025, with imports valued at approximately €1.691 billion. Taiwan followed at €1.225 billion, Türkiye at €516 million, the United Kingdom at €372 million, India at €314 million, Vietnam at €295 million and Thailand at €119 million.

China alone represented approximately 25.7% of total extra-EU fastener import value. **China and Taiwan together accounted for about €2.916 billion, equivalent to 44.3% of imports.** Adding Türkiye raises the share of these three suppliers to approximately 52.2%.

The direction of movement was equally important. Eurostat-based trade analysis indicates that extra-EU fastener import value increased by about 5.3% in 2025 compared with 2024, while exports were broadly stable, declining around 0.4%. EIFI data also show strong volume growth from key Asian origins during January-August 2025: imports from China rose 25.5% year on year, Taiwan 18.5% and Vietnam approximately 49%. Import growth also occurred against a tighter EU trade-defense environment. In June 2025, the European Commission imposed provisional anti-dumping duties ranging from 62.3% to 80.7% on certain screws and bolts without heads originating in China. This underscores that competition in the European fastener market is increasingly shaped by trade policy as well as price and demand.

EU Fastener Imports



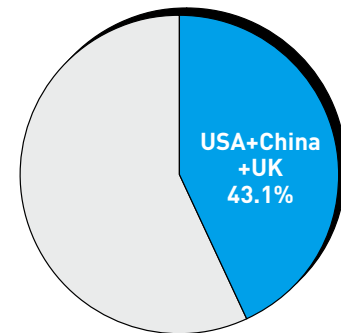
Europe's Export Strength Lies in Value, Not Tonnage

The United States was the largest destination for EU fastener exports in 2025, receiving approximately €1.154 billion. China followed at €716 million, the United Kingdom at €629 million, Switzerland at €364 million, Türkiye at €331 million, Mexico at €300 million and Brazil at €236 million. The US alone represented almost 20% of total extra-EU export value, while the US, China and UK together absorbed approximately 43.1%.

Transatlantic volumes weakened slightly during 2025. According to EIFI using Eurostat data, EU exports of CN 7318 fasteners to the United States fell from 49,400 tonnes in January-August 2024 to 48,300 tonnes in the same period of 2025, a decline of about 2%. EU imports from the US fell more sharply, from 8,200 tonnes to 7,400 tonnes, around 9%.

The broader export profile nevertheless illustrates Europe's industrial strength. In 2025, average EU export values were approximately €8.15/kg for threaded screws and bolts, €15.96/kg for nuts, €8.44/kg for self-tapping screws, €20.51/kg for washers and €18.37/kg for other non-threaded fasteners under CN 731829. **These values reinforce the importance of technically demanding, certified and higher-specification products in Europe's export mix.**

EU Fastener Exports

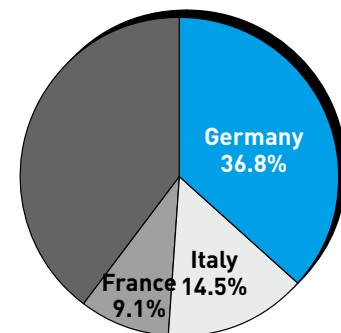


Domestic Production and Market Availability

Eurostat-linked production data indicate approximately 2.312 million tonnes of EU fastener production in 2025, valued at €10.10 billion. Combining reported production with extra-EU imports and exports gives estimated apparent consumption of approximately 3.59 million tonnes. This is an accounting estimate of market availability rather than a direct measure of final consumption, because inventories and re-exports can affect the result.

Production is concentrated geographically. Germany represented approximately 36.8% of reported EU fastener production in 2025, followed by Italy with 14.5% and France with 9.1%. Austria accounted for 4.6% and Slovakia 2.6%. Germany alone recorded approximately €2.70 billion of fastener exports and €2.00 billion of imports during the year.

2025 EU Fastener Production



Poland is also becoming an increasingly important demand centre, with fastener imports reaching approximately €543 million in 2025. Its position reflects the growing role of Central and Eastern Europe in automotive production, industrial investment and supply-chain localisation.

H1 2026: Demand Improves Selectively

The first half of 2026 showed some improvement in European industrial demand, but not a broad-based recovery. In June, EU industrial production was 0.6% above June 2025 and only 0.2% higher than in May. Intermediate-goods output increased 1.0% year on year and capital-goods production 0.9%, although both categories declined on a monthly basis.

EUROFER's June 2026 outlook points to similarly modest conditions across steel-using industries. It expects output in EU steel-using sectors to grow by only 1.3% in 2026 after a 0.1% decline in 2025, while apparent steel consumption is forecast to rise only 0.4%. For fastener producers, this suggests limited broad-based growth across the wider metal-consuming economy. Construction remained uneven. Total EU construction production in June 2026 was only 0.2% above June 2025 and declined 1.0% from May. Building construction fell 4.9% year on year, while civil engineering increased 1.4%. The contrast points to weaker conditions for building-related fastening products but relatively better prospects in infrastructure applications.

Automotive indicators were stronger. EU passenger-car registrations increased 5.7% during H1 2026. Commercial vehicles also improved, with van registrations up 1.9% to 742,759 units and truck registrations rising 9.8% to 171,933 units. Heavy-truck registrations increased 11.1%. These figures provide a more positive demand signal for automotive and transport-related fasteners. Aerospace also strengthened. Airbus delivered 351 commercial aircraft in H1 2026 compared with 306 in H1 2025, an increase of approximately 14.7%. Although this is not an EU-wide fastener statistic, higher aircraft output is directly relevant to European suppliers of high-specification aerospace fastening systems.

The H1 2026 picture is therefore best described as a selective recovery. Automotive, commercial vehicles and aerospace showed clearer growth signals, while overall industrial production remained modest and conventional building construction was weak. The strongest opportunities consequently remain concentrated in technically demanding applications rather than across the entire fastener market.



CBAM Adds a New Dimension to Import Competition

CN 7318 fasteners are included within the EU Carbon Border Adjustment Mechanism, or CBAM. **From 2026, the competitive comparison between European and imported fasteners increasingly includes carbon data, embedded emissions and compliance costs in addition to factory price, freight and conventional customs duties.** For Asian suppliers, Europe therefore remains a large but increasingly regulated market. For European manufacturers, CBAM may reduce some carbon-cost asymmetry, although it does not eliminate the fundamental price gap in commodity fasteners.

Outlook

Europe's fastener market is becoming increasingly segmented. The EU remains a major net importer by physical volume, with China and Taiwan together accounting for more than 44% of 2025 extra-EU import value. At the same time, the average value of EU fastener exports was almost three times the import value per kilogram, underlining Europe's stronger position in higher-value and technically demanding products. Entering the second half of 2026, demand conditions remain mixed. Automotive, commercial vehicles, aerospace and selected infrastructure applications offer better prospects, while building construction and parts of general industry remain subdued. Commodity fasteners will continue to face strong import competition, while European producers are better positioned where engineering content, certification, traceability, low-carbon production and supply reliability carry greater value. ■

Sources

- Eurostat, EU trade, industrial production, construction and production statistics.
- EIFI, European fastener trade statistics and market updates based on Eurostat data.
- ACEA, EU passenger car and commercial vehicle registrations, H1 2026.
- EUROFER, Economic and Steel Market Outlook 2026–2027.
- Airbus, H1 2026 commercial aircraft deliveries and results.
- European Commission / EUR-Lex, EU fastener trade-defense and CBAM regulations.

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