

# Asia's Fastener Market Is Growing — But Not in One Direction

成长但路线分歧的亚洲紧固件市场



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*Asia entered 2026 with the world's largest and most complex fastener industry. But describing the region simply as “growing” misses the point. China is still the dominant export machine. Taiwan remains heavily dependent on overseas customers. Japan and South Korea continue to compete through higher-value manufacturing. India is becoming increasingly important because of the size of its own domestic demand. Southeast Asia is attracting more manufacturing investment but still imports large volumes of fasteners. Meanwhile, the Persian Gulf is building demand faster than local production can fully respond. So the real story across Asia in 2025 and the first half of 2026 is not just expansion. It is divergence. Some countries are producing for the world. Others are consuming more than they manufacture. And several are trying to move from one position to the other.*



## China: More Fasteners, More Markets — and Still More Pressure

China remained the centre of gravity of the Asian fastener industry in 2025. Exports under HS 7318 reached approximately 4.9997 million tonnes worth US\$10.046 billion. Compared with 2024, its export volume increased by 7.31%, while the value increased by only 5.04%.

That difference matters. Chinese manufacturers shipped substantially more fasteners, but their revenue did not rise at the same speed. In other words, the volume was still doing more of the work than the price. The pressure on standard fasteners remained intense. China's reach across Asia is equally important.

In 2025, China exported roughly:

- ◆ US\$679.4 million of HS 7318 fasteners to Vietnam;
- ◆ US\$347.8 million to Thailand;
- ◆ US\$340.4 million to Japan;
- ◆ US\$302.5 million to South Korea;
- ◆ US\$288.3 million to India;
- ◆ US\$257.2 million to Malaysia;
- ◆ US\$172.8 million to Indonesia.

Its role in West Asia was also significant, with approximately US\$324.3 million exported to the UAE and US\$228.8 million to Saudi Arabia. The United States remained China's largest individual destination, taking around US\$1.262 billion in HS 7318 products. What these figures show is that **China is no longer simply the fastener factory supplying Europe and North America. It is also the upstream supplier feeding industrial growth elsewhere in Asia.** But there is another side to the Chinese market that is often overlooked. During the first half of 2025, China imported approximately US\$1.126 billion of HS 7318 fasteners. Japan supplied around US\$239 million, the United States US\$204.5 million, Germany US\$194.8 million and Taiwan US\$114.9 million.

That is a useful reminder that scale does not equal complete self-sufficiency. China can dominate the global market for standard fasteners while still importing specialized, technically demanding and application-critical products.



The first half of 2026 suggests that China's export engine was still running strongly. Industry reporting based on customs data puts exports at approximately US\$6.17 billion and 3.125 million tonnes, with the value up about 4.3% and the volume up around 2.3% year on year.

This time, the value was growing faster than the volume. That does not prove that pricing pressure has disappeared, but it does suggest that the balance between price and tonnage improved compared with the pattern seen during 2025. China's domestic market remains equally important. Industry estimates put the 2025 fastener market or output value near RMB167.5 billion, while estimates for H1 2026 place domestic demand at approximately RMB64–66 billion.



## Taiwan: Strong Manufacturing, but Too Much Dependence on Export Markets

If China has the advantage of scale, Taiwan has built its reputation around the export capability. In 2025, Taiwanese fastener exports were worth approximately US\$4.20 billion, with a volume of around 1.23 million tonnes.

Its export value declined from US\$4.37 billion in 2024, while the volume fell about 4.1%. Average export pricing, however, edged upward to roughly US\$3.53/kg. More important than the decline itself is Taiwan's exposure to international demand. More than 90% of Taiwanese fastener production is exported. That is an extraordinary level of dependence.

The United States alone accounted for approximately US\$1.794 billion, or 42.7% of Taiwan's 2025 fastener export value. For many years, that concentration worked in Taiwan's favor. Taiwanese suppliers became deeply embedded in North American distribution networks and industrial supply chains. But concentration becomes dangerous when the market weakens. During the first half of 2026, Taiwan shipped approximately 252,275 tonnes of fasteners to the

United States, down 14.8% year on year. The US still represented about 44.6% of Taiwanese export tonnage. That gives Taiwan a different strategic problem from China. **Taiwan does not lack technical manufacturing capability. Its weakness is that too much of that capability depends on external demand, particularly from a handful of mature markets.** Domestic consumption is relatively modest by comparison. In Q1 2026, Taiwan's fastener production value was approximately NT\$34.97 billion, exports were NT\$32.97 billion and imports NT\$2.13 billion.

Using a simple apparent-consumption calculation:

$\text{NT\$34.97bn} + \text{NT\$2.13bn} - \text{NT\$32.97bn} = \text{approximately NT\$4.13bn}$

The figure should be treated as an estimate rather than audited consumption, but the direction is unmistakable. Taiwan produces far more fasteners than it consumes domestically. That makes export diversification and higher-value products increasingly important.

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## Japan: A Market Where Domestic Demand Matters More Than Export Volume

Japan tells a very different story. Its fastener exports were approximately US\$2.36 billion in 2025, broadly stable compared with the previous year. On the export value alone, Japan may appear less important than China or Taiwan. That would be misleading.

Japan's industrial-fastener market was estimated at approximately US\$8.49 billion in 2025, reflecting the enormous domestic demand created by automotive manufacturing, industrial machinery, electronics and precision engineering. **Unlike Taiwan, Japan is not overwhelmingly dependent on foreign customers.** Its manufacturers operate inside a large domestic industrial ecosystem that consumes significant volumes of high-specification fastening products. There were, however, signs of weaker external demand toward the end of the first half of 2026. Japanese trade data showed June fastener exports of approximately 24,062 tonnes valued at ¥30.83 billion, with the export value down 21.7% year on year. One month does not define an entire market, but it does suggest that Japan entered the second half of 2026 under softer export conditions.



## South Korea: Producer and Buyer at the Same Time

South Korea sits somewhere between Japan and China. In 2025, South Korean HS 7318 exports were approximately US\$986.9 million, while imports reached about US\$662.7 million. That created a trade surplus of roughly US\$324 million. At the same time, South Korea's industrial-fastener market was estimated at around US\$2.03 billion. This combination is important. **Korea is clearly capable of producing and exporting technically competitive fasteners, but its automotive, shipbuilding, electronics and machinery sectors are sophisticated enough that the domestic production does not replace the need for imports.**



## India: The Biggest Opportunity May Be at Home

India is becoming one of the most important fastener markets in Asia. In 2025, India imported approximately US\$1.128 billion of HS 7318 products. At the same time, industry and ITC data indicate that Indian fastener exports reached roughly US\$1.03 billion during the first half of 2025 alone, up around 17.1% year on year.

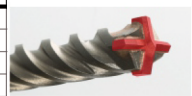


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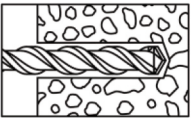
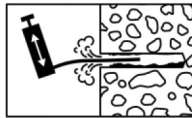
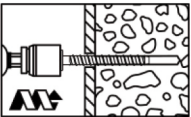
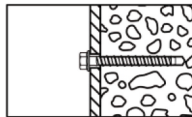
**■ ANSI-B212.15**

| Anchor Size (mm) | Nominal Diameter of Drill Bit (mm) | Tolerance Range (mm) - (D) |
|------------------|------------------------------------|----------------------------|
| M6               | 6.0                                | 6.15-6.40                  |
| M8               | 8.0                                | 8.20-8.45                  |
| M10              | 10.0                               | 10.20-10.45                |
| M12              | 12.0                               | 12.20-10.50                |

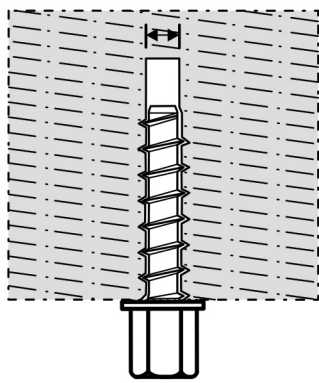


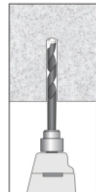
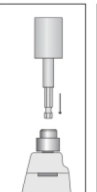
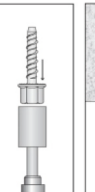
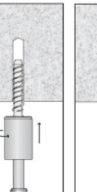
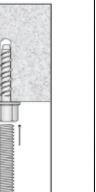
**Installation information**

- Using the proper size carbide bit, drill a pilot hole at least 0.5 deeper than the desired anchor embedment.
- Clean the hole using a nylon brush and compressed air.
- A. Solid Concrete: Using an electric impact wrench, or socket wrench, insert anchor through the fixture into hole and tighten anchor until fully seated. If using an electric impact wrench, start on light torque setting to prevent over-torquing or damaging threads.
- B. Concrete Block: Using a socket wrench insert anchor into hole and hand tighten anchor until full seated. Do not use an impact wrench for installation into Concrete Block walls.

Drilling Diameter (metric)



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The United States accounted for approximately US\$320 million, while the UAE, Netherlands, South Korea and Germany were among the other major destinations. Those numbers already show a growing export sector. But **India's real significance lies in its domestic market.** One industry estimate valued the Indian fastener market at approximately US\$11.24 billion in 2025, with the growth toward US\$16.95 billion forecast by 2034.

## Southeast Asia: Manufacturing Is Moving Faster Than the Fastener Supply Base

Southeast Asia is one of the most interesting parts of the Asian fastener market because it shows what happens when manufacturing relocates faster than the local supplier ecosystem develops.



### Thailand

Thailand exported approximately US\$663 million of HS 7318 products in 2025. It imported approximately US\$1.231 billion. That leaves a fastener trade deficit of roughly US\$568 million. For a country with such a substantial automotive and manufacturing base, that gap is significant. Thailand's industrial-fastener market had also been estimated at around US\$1.67 billion in 2025.



### Malaysia and Indonesia



Malaysia imported approximately US\$673.7 million of HS 7318 products in 2025. Its electronics, electrical equipment, automotive and machinery sectors create steady demand, while local production does not fully replace the need for imports.

Indonesia showed a similar pattern, importing approximately US\$447.7 million of HS 7318 products in 2025. China alone supplied roughly US\$172.8 million. For both countries, the industrial growth is creating opportunities for suppliers that can shorten lead times and provide stronger regional support.



### Vietnam

Vietnam is moving in a slightly different direction. Fastener exports reached approximately US\$760 million during H1 2025, up 6.4% year on year. Germany was reported as one of its largest destinations at around US\$140 million, followed by the United States at approximately US\$110 million.

Yet at the same time, China exported approximately US\$679.4 million of HS 7318 products to Vietnam during full-year 2025. That combination tells us something important. Vietnam is becoming a fastener manufacturing and export platform, but it still depends heavily on imported upstream components and industrial supplies. A narrower industry estimate placed Vietnam's domestic industrial-fastener market at around US\$529 million in 2025. Vietnam should therefore be viewed as both a customer and a competitor.

## West Asia: Demand Is Being Built Through Investment

West Asia is often ignored in Asian fastener analysis, but that is increasingly difficult to justify.

Saudi Arabia's fastener market was estimated at approximately US\$3.16 billion in 2025.

**Demand is being supported by infrastructure, industrial projects, oil and gas, construction and the broader Vision 2030 investment program.** China alone exported approximately US\$228.8 million of HS 7318 products to Saudi Arabia during 2025. But the market is changing. Saudi Arabia increasingly wants more local content. That means foreign fastener companies may eventually need to offer more than containers arriving at the port. Local distribution, finishing, warehousing, partnerships, joint ventures and eventually localized production are likely to become more important.

The UAE presents a different opportunity. Its industrial-fastener market has been estimated at around US\$1.1 billion, with imported products accounting for a large share of demand. China shipped approximately US\$324.3 million of HS 7318 products to the UAE in 2025.

But much of the UAE's importance comes from its role as a trading and re-export hub.

## Central Asia: Small Markets, Large Trade Flows

Central Asia is still a smaller fastener market, but some of the trade numbers are surprisingly large. China exported approximately US\$150.2 million of HS 7318 fasteners to Kyrgyzstan in 2025 and about US\$109 million to Kazakhstan. Those figures are considerable relative to the size of the economies involved. Not all of that volume necessarily represents final domestic consumption. Re-export and regional distribution are part of the picture. Still, the numbers show how rapidly Central Asia is becoming linked to Chinese industrial supply networks. **For exporters, this is less a story of building large local manufacturing operations and more a story of controlling distribution channels.**



## Conclusion: The Competitive Reality for Fastener Suppliers

The standard fastener market is becoming harder. China still has enormous scale. India is increasing capacity. Vietnam and other ASEAN economies are expanding their manufacturing bases. For a producer selling standard bolts, screws or nuts without a strong cost, delivery or distribution advantage, the market is becoming increasingly unforgiving. But that does not mean the opportunity is disappearing. It is shifting.

China still imports specialized fasteners despite producing millions of tonnes domestically. Japan and South Korea remain attractive for high-specification applications. India offers growing opportunities inside the domestic market. Southeast Asia still has gaps between local industrial demand and local supply. The Persian Gulf continues to create demand through infrastructure, energy and industrial investment. The opportunity is no longer simply “Asia.” It is the mismatch between what a country needs and what its local fastener industry can reliably supply. ■

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