



Potential U.S. Fastener Demand Markets in 2026: Industrial Machinery & Equipment in Focus

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As the U.S. manufacturing sector continues to navigate economic uncertainty, shifting trade policies, and evolving supply chain strategies, fastener suppliers are closely watching where the next wave of demand may emerge. While traditional end markets such as automotive and construction remain important, industrial machinery and equipment appears poised to offer significant opportunities for fastener consumption in 2026.

Industrial machinery encompasses a broad range of equipment, from robotics and machine tools to earthmoving equipment and industrial processing systems. Although these sectors differ in their applications, they share one common characteristic: they are highly dependent on fasteners for assembly, installation, maintenance, and repair. As manufacturers invest in automation and modernization of production facilities, and expand infrastructure-related projects, demand for industrial fasteners is likely to follow.

Among the many segments that make up the industrial machinery landscape, factory automation and robotics, CNC machine tools, and construction and heavy equipment stand out as three areas with particularly strong potential to support fastener demand in 2026.

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Why Industrial Machinery Matters to Fastener Suppliers

Industrial machinery is among the most fastener-intensive sectors of the manufacturing economy. Fasteners play a critical role in virtually every stage of equipment production and operation, from the assembly of machine frames and structural components to the installation of electrical systems, motion controls, guarding systems, and hydraulic equipment.

Unlike some end-use markets that rely heavily on one-time purchases, industrial machinery also generates substantial aftermarket demand. Equipment must be maintained, repaired, upgraded, and periodically rebuilt throughout its service life. As a result, fastener demand is driven not only by new machinery production but also by ongoing maintenance activities that continue long after equipment leaves the factory floor.

This combination of original equipment manufacturing (OEM) demand and aftermarket demand creates a stable and diversified source of fastener consumption. For suppliers seeking growth opportunities in 2026, understanding which machinery segments are attracting investment may provide valuable insight into future fastener demand trends.

Factory Automation and Robotics: Investing in Productivity

Factory automation has become a strategic priority for manufacturers across a wide range of industries. Persistent labor shortages, rising labor costs, and increasing productivity expectations have encouraged companies to invest in automation technologies that improve efficiency and reduce operational risk.

Industrial robots, automated assembly systems, conveyor networks, machine vision systems, and collaborative robots are becoming increasingly common in modern manufacturing facilities. In addition to helping manufacturers address workforce challenges, these technologies support reshoring initiatives by making domestic production more competitive.



For fastener suppliers, the growth of automation extends far beyond the robots themselves. Automated production cells require extensive supporting infrastructure, including machine frames, guarding systems, mounting structures, material handling equipment, and control cabinets. These systems rely on a wide variety of fasteners, including machine screws, socket head cap screws, lock nuts, washers, and specialty fastening solutions designed for vibration resistance and precision assembly. A single robotic production cell can contain hundreds or even thousands of fasteners distributed throughout its supporting systems. As automation investments continue to expand, demand for the fasteners that hold these systems together is expected to grow as well.

The Foundation of Manufacturing Expansion

If automation represents the future of manufacturing, CNC machine tools remain its foundation. Machining centers, lathes, milling machines, grinding systems, and other precision machine tools are essential for producing components used throughout the industrial economy.

Whenever manufacturers expand production capacity, establish new facilities, or bring production closer to home, investment in machine tools often follows. These machines enable manufacturers to produce parts with the precision, efficiency, and consistency required in today's competitive environment.

Machine tools themselves are complex assemblies that rely heavily on fasteners. Structural frames, sheet metal enclosures, motion systems, tool changers, electrical cabinets, and coolant systems all require extensive fastening solutions. Precision and reliability are especially important, as machine tool performance depends on maintaining tight tolerances and long-term stability.

In addition to supporting demand during the manufacturing and installation phases, CNC machine tools generate ongoing aftermarket opportunities. Fasteners are routinely replaced during maintenance procedures, machine upgrades, and retrofits. As manufacturers continue investing in productivity-enhancing technologies, machine tools are likely to remain an important source of industrial fastener demand.

Key Drivers Behind U.S. Industrial Machinery Demand in 2026

Several underlying trends are expected to support demand for industrial machinery and equipment in the United States in 2026. Ongoing reshoring efforts and investments in domestic manufacturing capacity continue to drive purchases of production equipment, machine tools, and factory systems as companies seek to strengthen supply chain resilience and expand local operations. At the same time, persistent labor shortages and rising labor costs are accelerating the adoption of automation technologies, including industrial robots, automated material handling systems, and smart manufacturing solutions designed to improve productivity. Meanwhile, rapid growth in AI-related data center construction, energy infrastructure upgrades, and broader industrial development is creating demand for construction and heavy equipment needed to support these large-scale projects.

Together, these trends are generating opportunities across multiple machinery segments and, by extension, supporting demand for the fasteners used to assemble, install, maintain, and repair this equipment. For fastener suppliers, understanding these macroeconomic and industrial drivers may provide valuable insight into where future demand is likely to emerge in the year ahead.

Reading the Signals: What HS 7318 Import Data Suggests for 2026

Recent import data for HS Chapter 7318 provides a mixed picture of U.S. fastener demand heading into 2026. **Comparing the first quarter of 2026 with the same period in 2025 (Table 1), total U.S. imports of fasteners under HS 7318 declined by 16.7% in terms of CIF value, falling from US\$1.78 billion to US\$1.49 billion.** The decline was reflected across several major supplying countries, including Taiwan (-17.6%), China (-27.9%), and Mexico (-36.5%), suggesting softer import demand compared with the elevated levels seen a year earlier.

Table 1. U.S. Imports of Fasteners under HS 7318 (Q1 2026 Vs. Q1 2025)

Country of Origin	2025 - Q1		2026 - Q1		Volume Change	
	General Total Value CIF (USD)	%	General Total Value CIF (USD)	%	General Total Value CIF (USD)	%
Taiwan	584,741,887.00	32.77	482,033,138.00	32.43	-102,708,749.00	-17.57
China	336,602,746.00	18.87	242,685,212.00	16.33	-93,917,534.00	-27.91
Japan	160,136,364.00	8.98	133,830,498.00	9.01	-26,305,866.00	-16.43
Germany	82,612,427.00	4.63	80,823,040.00	5.44	-1,789,387.00	-2.17
Canada	99,042,006.00	5.55	75,785,271.00	5.10	-23,256,735.00	-23.49
Italy	71,515,773.00	4.01	74,288,530.00	5.00	2,772,757.00	3.88
India	77,732,904.00	4.36	72,631,902.00	4.89	-5,101,002.00	-6.57
S. Korea	78,821,589.00	4.42	71,614,189.00	4.82	-7,207,400.00	-9.15
Mexico	59,707,876.00	3.35	37,901,160.00	2.55	-21,806,716.00	-36.53
France	31,991,041.00	1.80	31,970,789.00	2.16	-20,252.00	-0.07
Total	1,784,710,656.00	100.00	1,486,498,832.00	100.00	-298,211,824.00	-16.71



Taiwan and China still account for nearly half of all U.S. fastener imports, with a combined market share of 48.8%.

Despite the decline, Taiwan maintained its position as the dominant supplier to the U.S. market, accounting for 32.4% of total import value in the first quarter of 2026. Although imports from Taiwan fell year-over-year, its market share remained largely unchanged from 32.8% in the first quarter of 2025, underscoring the country's continued importance in supplying industrial and manufacturing fasteners to the United States. China remained the second-largest supplier, though its market share declined from 18.9% to 16.3% as imports fell nearly 28%. Together, Taiwan and China still accounted for nearly half of all U.S. fastener imports, with a combined market share of 48.8%.

Looking at product categories, screws and bolts (HS 7318.15), the largest fastener category and one heavily associated with industrial machinery and equipment applications, declined 18% year-over-year. Washers (HS 7318.22) fell 21%, while wood screws (HS 7318.11) dropped 31%. The primary exception was self-tapping screws (HS 7318.12), which increased 12.5% during the period.

Table 2. U.S. Imports of Fasteners Under HS 7318 by Category (Q1 2026 Vs. Q1 2025)

HS Code (6)	2025 - Q1		2026 - Q1		Volume Change	
	General Total Value CIF (USD)	%	General Total Value CIF (USD)	%	General Total Value CIF (USD)	%
731815 - Threaded Screws And Bolts Others, With Or Without Their Nuts Or Washers, Of Iron Or Steel	791,262,279.00	44.34	646,067,083.00	43.47	-145,195,196.00	-18.35
731816 - Nuts, Threaded, Of Iron Or Steel	375,009,553.00	21.02	320,676,778.00	21.58	-54,332,775.00	-14.49
731814 - Self-Tapping Screws, Threaded, Of Iron Or Steel	323,152,541.00	18.11	266,695,556.00	17.95	-56,456,985.00	-17.48
731829 - Nonthreaded Articles (Fasteners) Others, Of Iron Or Steel	95,710,990.00	5.37	79,426,954.00	5.35	-16,284,036.00	-17.02
731822 - Washers, Other Than Lock Washers, Of Iron Or Steel	83,397,429.00	4.68	65,181,246.00	4.39	-18,216,183.00	-21.85
731819 - Threaded Articles Of Iron Or Steel Others	41,564,807.00	2.33	40,030,494.00	2.70	-1,534,313.00	-3.70
731821 - Spring Washers And Other Lock Washers, Of Iron Or Steel	21,640,966.00	1.22	20,354,647.00	1.37	-1,286,319.00	-5.95
731824 - Cotters And Cotter Pins, Of Iron Or Steel	18,399,300.00	1.04	17,321,890.00	1.17	-1,077,410.00	-5.86
731823 - Rivets Of Iron Or Steel	17,271,598.00	0.97	15,180,539.00	1.03	-2,091,059.00	-12.11
731812 - Wood Screws Other Than Coach Screws, Threaded, Of Iron Or Steel	7,010,306.00	0.40	7,888,239.00	0.54	877,933.00	12.53
731813 - Screw Hooks And Screw Rings, Threaded, Of Iron Or Steel	4,738,769.00	0.27	3,849,111.00	0.26	-889,658.00	-18.78
731811 - Coach Screws, Threaded, Of Iron Or Steel	5,552,118.00	0.32	3,826,295.00	0.26	-1,725,823.00	-31.09
Total	1,784,710,656.00	100.00	1,486,498,832.00	100.00	-298,211,824.00	-16.71

Despite the weaker year-over-year performance, the comparison with the previous quarter (Table 3) suggests a more positive short-term trend. Between the fourth quarter of 2025 and the first quarter of 2026, total U.S. fastener imports increased 5.3% in CIF value. Imports from Mexico rose 17.5%, while India, Taiwan, and Canada all recorded quarter-over-quarter gains, indicating some recovery in purchasing activity as 2026 began. Monthly data showed a similar pattern, with imports declining from US\$511.1 million in January to US\$451.0 million in February before rebounding to US\$524.4 million in March, the highest monthly total of the quarter.

The composition of imports (Table 4) also reflects the importance of industrial and manufacturing-related applications within the U.S. market. During the first quarter of 2026, screws and bolts (HS 7318.15) accounted for 43.8% of total import value, followed by nuts (HS 7318.16) at 22.2% and self-tapping screws at 16.6%. Together, these categories represented more than 80% of total import value, highlighting the continued importance of machinery, manufacturing, and equipment-related sectors in supporting U.S. fastener demand.



Table 3. U.S. Imports of Fasteners Under HS 7318 (Q1 2026 Vs. Q4 2025)

Country of Origin	2025 - Q4		2026 - Q1		Volume Change	
	General Total Value CIF (USD)	%	General Total Value CIF (USD)	%	General Total Value CIF (USD)	%
Taiwan	443,315,765.00	31.42	482,033,138.00	32.43	38,717,373.00	8.74
China	240,690,026.00	17.06	242,685,212.00	16.33	1,995,186.00	0.83
Japan	140,165,610.00	9.94	133,830,498.00	9.01	-6,335,112.00	-4.52
Germany	75,762,720.00	5.37	80,823,040.00	5.44	5,060,320.00	6.68
Canada	69,754,127.00	4.95	75,785,271.00	5.10	6,031,144.00	8.65
Italy	71,076,246.00	5.04	74,288,530.00	5.00	3,212,284.00	4.52
India	65,701,289.00	4.66	72,631,902.00	4.89	6,930,613.00	10.55
S. Korea	66,261,626.00	4.70	71,614,189.00	4.82	5,352,563.00	8.08
Mexico	32,249,773.00	2.29	37,901,160.00	2.55	5,651,387.00	17.53
France	31,105,418.00	2.21	31,970,789.00	2.16	865,371.00	2.79
Total	1,411,130,616.00	100.00	1,486,498,832.00	100.00	75,368,216.00	5.35

Table 4. U.S. Imports of Fasteners Under HS 7318 by Category (Q1 2026 Vs. Q4 2025)

HS Code (6)	2025 - Q4		2026 - Q1		Volume Change	
	General Total Value CIF (USD)	%	General Total Value CIF (USD)	%	General Total Value CIF (USD)	%
731815 - Threaded Screws And Bolts Others, With Or Without Their Nuts Or Washers, Of Iron Or Steel	619,674,820.00	43.92	646,067,083.00	43.47	26,392,263.00	4.26
731816 - Nuts, Threaded, Of Iron Or Steel	314,191,106.00	22.27	320,676,778.00	21.58	6,485,672.00	2.07
731814 - Self-Tapping Screws, Threaded, Of Iron Or Steel	242,543,890.00	17.19	266,695,556.00	17.95	24,151,666.00	9.96
731829 - Nonthreaded Articles (Fasteners) Others, Of Iron Or Steel	75,386,471.00	5.35	79,426,954.00	5.35	4,040,483.00	5.36
731822 - Washers, Other Than Lock Washers, Of Iron Or Steel	60,636,587.00	4.30	65,181,246.00	4.39	4,544,659.00	7.50
731819 - Threaded Articles Of Iron Or Steel Others	33,672,055.00	2.39	40,030,494.00	2.70	6,358,439.00	18.89
731821 - Spring Washers And Other Lock Washers, Of Iron Or Steel	20,063,622.00	1.43	20,354,647.00	1.37	291,025.00	1.46
731824 - Cotters And Cotter Pins, Of Iron Or Steel	15,938,347.00	1.13	17,321,890.00	1.17	1,383,543.00	8.69
731823 - Rivets Of Iron Or Steel	13,585,959.00	0.97	15,180,539.00	1.03	1,594,580.00	11.74
731812 - Wood Screws Other Than Coach Screws, Threaded, Of Iron Or Steel	6,768,122.00	0.48	7,888,239.00	0.54	1,120,117.00	16.55
731813 - Screw Hooks And Screw Rings, Threaded, Of Iron Or Steel	3,815,441.00	0.28	3,849,111.00	0.26	33,670.00	0.89
731811 - Coach Screws, Threaded, Of Iron Or Steel	4,854,196.00	0.35	3,826,295.00	0.26	-1,027,901.00	-21.18
Total	1,411,130,616.00	100.00	1,486,498,832.00	100.00	75,368,216.00	5.35



Challenges & Factors to Watch

While the outlook for industrial machinery and equipment remains generally positive, several factors will influence the pace of fastener demand growth in 2026. Economic uncertainty, interest rates, trade policy developments, and capital spending decisions could affect the timing of new equipment purchases and facility expansions. Manufacturers may continue to prioritize investments that improve productivity and operational efficiency, but broader economic conditions will likely shape the scale and speed of those investments.

One of the most important factor: AI-related infrastructure

The rapid expansion of data centers, semiconductor facilities, power generation projects, and supporting infrastructure has become an increasingly important source of demand for industrial machinery, automation systems, and heavy equipment. These projects not only require substantial capital investment but also create downstream demand for the fasteners used throughout equipment manufacturing, installation, and maintenance. Therefore, **the booming development of AI infrastructure is continuously creating new growth opportunities for the fastener industry.** However, questions remain regarding the long-term pace of

AI-driven investment. While demand for computing capacity and supporting infrastructure has fueled a wave of construction and equipment purchases in recent years, some industry observers have begun to question whether the market can sustain its current growth trajectory indefinitely. If rising development costs, energy constraints, or changing investment priorities begin to slow the pace of AI-related projects, demand growth in certain machinery segments could eventually moderate.

Nevertheless, factory automation and robotics, CNC machine tools, and construction and heavy equipment are expected to remain among the most important industrial machinery segments supporting fastener consumption in 2026. Backed by reshoring initiatives, manufacturing modernization efforts, infrastructure development, and ongoing productivity investments, these sectors continue to offer meaningful opportunities for fastener suppliers seeking growth in an evolving industrial landscape. Although the industrial machinery and equipment sector encompasses a wide range of applications, several segments appear particularly well positioned to support U.S. fastener demand in 2026. Factory automation and robotics continue to gain momentum as manufacturers pursue productivity improvements and labor-saving solutions, while investments in CNC machine tools reflect ongoing efforts to expand and modernize domestic manufacturing capacity. At the same time, infrastructure development, industrial construction, and heavy equipment activity remain important sources of demand for high-strength and specialty fastening products. Recent HS 7318 import trends suggest that demand for industrial fasteners remains closely tied to broader investment in manufacturing and equipment-related industries. While economic conditions and capital spending patterns will continue to shape the pace of growth, the long-term drivers supporting automation, reshoring, and industrial development remain firmly in place. For fastener suppliers, these machinery-related sectors may represent some of the most promising opportunities for growth as the U.S. market moves into 2026. ■



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