

# Assessing the Impact:

## U.S. Fastener Imports Post-Steel and Aluminum Tariffs in 2025

**Data note:**

The data for this article is derived from the US Census trade statistics. US Census trade statistics analyze imports and exports across all modes of transportation. That value is calculated in USD by general CIF for imports. Fasteners in this article are defined as any product under HS Code 7318 (screws, bolts, nuts, coach screws, screw hooks, rivets, cotters, cotter pins, washers and similar articles or iron or steel) and all subsequent HS codes including 731815, 731816, 731814, 731829, 731822, etc.

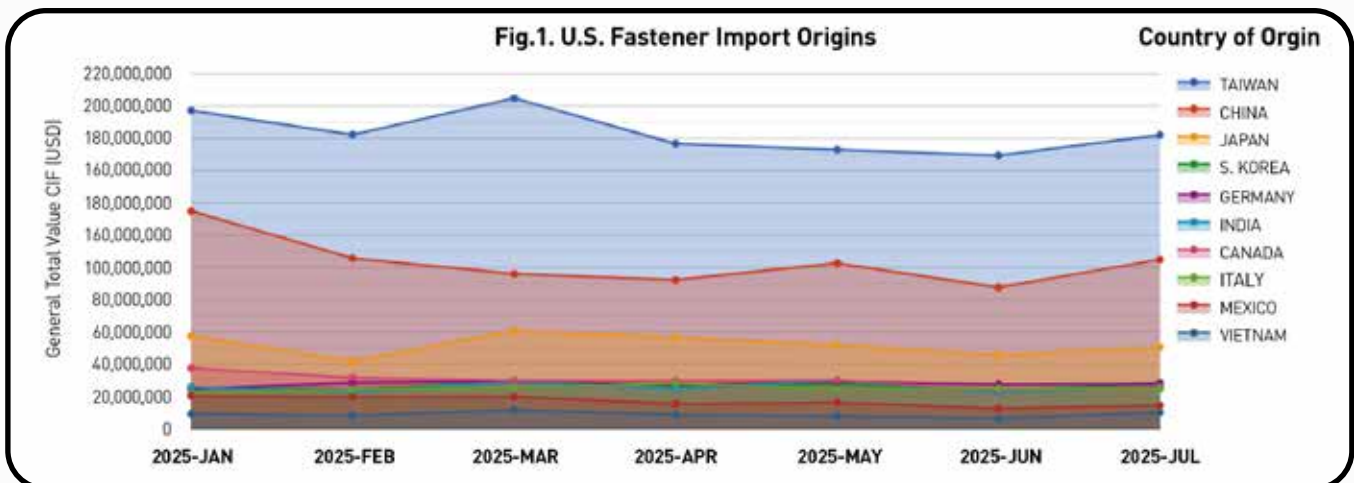
In 2025, the U.S. fastener industry finds itself navigating the continuing impact of steel and aluminum tariffs, a key element of trade policy initially implemented to safeguard domestic metal production. While originally aimed at addressing global overcapacity and national security concerns, the tariffs led to significant shifts in sourcing and pricing strategies throughout the manufacturing sector.

Under the Trump administration, these tariffs have not only remained in place but have been selectively expanded in 2025 to cover a broader array of derivative products, including more components essential to the fastener industry. Unlike the initial rollout of tariffs in 2018 which were met with widespread

pushback and exemption requests, the 2025 adjustments have been more targeted aiming to address persistent trade imbalances and reinforce domestic supply chain resilience in response to ongoing geopolitical and economic pressures.

Utilizing comprehensive U.S. Census data, this article examines the import dynamics of fastener classified under the Harmonized System (HS) code 7318 which encompasses screws, bolts, nuts, rivets, washers, and related items. Import trends from the first seven months of 2025 reveal how ongoing tariff enforcement is shaping trade flows and influencing procurement decisions in the U.S. fastener market.

### Tariff Impact by Major Source Countries



Taiwan has consistently held its position as the top fastener trading partner of the United States throughout 2025 (Fig. 1), supplying over 30% of the total fastener import value in U.S. dollars (USD) each month. This sustained dominance underscores Taiwan's integral role in the U.S. fastener supply chain, particularly in the face of shifting global trade dynamics and tariff adjustments.

**Trailing Taiwan is China, which has experienced a notable decline in its share of U.S. fastener import value.** In January 2025, China accounted for approximately 22% of total fastener imports by value (USD). However, this dropped to 19% in February and further to 16% in March. While Chinese export values leveled off in subsequent months, modest rebounds were observed in May and July. Despite these upticks, the overall trend from January to July reflects a nearly 23% decrease in the value of fasteners exported from China to the U.S., suggesting an **ongoing strategy of the U.S. to shift away from Chinese suppliers.**

Mexico has followed a similar trajectory. By July 2025, the value of fastener exports from Mexico to the U.S. had decreased by almost 29% compared to January levels. These contractions in total import value from China and Mexico signal a broader trend: U.S. companies are diversifying their supplier base at an accelerated pace, seeking sources in countries with lower tariff burdens and more competitive pricing.

Among the beneficiaries of this diversification are South Korea and Germany. South Korea increased its fastener export value to the U.S. by 12% in July compared to January 2025, showing a steady rise in market share. Likewise, Germany recorded a similar 12% growth over the same period, reflecting growing interest in European sources with stable trade conditions and high-quality production standards. These shifts indicate that the U.S. fastener industry is actively recalibrating its import strategy in response to evolving trade policy and economic pressures.

The ongoing evolution of U.S. tariff policy in 2025 appears to be a driving force behind these trade shifts. The expanded enforcement of Section 232 tariffs on steel and aluminum products, along with derivative goods, has likely contributed to reduced import volumes from countries like China and Mexico, where the cost impact of these duties may be more pronounced. These tariffs not only raise the landed cost of fasteners but also incentivize U.S. buyers to explore more favorable sourcing options in tariff-exempt or lower-duty regions. **The relative increase in imports from countries such as South Korea and Germany, two countries known for their high-quality manufacturing and favorable trade terms, suggests that tariff policy is actively influencing procurement behavior and accelerating diversification strategies across the U.S. fastener supply chain.**

## Subcategory Analysis and Market Response

Within the broader 7318 HS category, several key subcategories dominate the U.S. fastener import landscape by value (Table 1). Threaded screws and bolts, classified under 731815, consistently account for the largest share, representing approximately 43% of the total monthly import value in USD throughout 2025. This subcategory has remained the most stable performer month over month, underscoring its foundational role in U.S. manufacturing and construction sectors. Threaded nuts of iron or steel, categorized under 731816, follow with a substantial share ranging between 20% and 22% of the monthly import value. Self-tapping screws (731814) rank closely behind, contributing roughly 18% to monthly totals, making these three subcategories the primary drivers of U.S. fastener imports in terms of value.

However, when comparing import values from January to July 2025 across the top 10 subcategories under 7318, all but one showed year-to-date declines. Among the most notable were subcategories 731822 (other washers) and 731823 (rivets), which experienced significant drops of approximately 20% and 21%, respectively. These reductions suggest shifting demand or sourcing disruptions potentially linked to cost increases, tariff exposure, or supply chain realignment.

The only subcategory to record growth during this period was 731812 (other wood screws), which posted a nearly 10% increase in July compared to January. This upward movement may reflect increased demand for corrosion-resistant or specialized fastening solutions in sectors like automotive, infrastructure, or energy, where stainless steel components are critical.

Companies working to diversify their supply chains will likely face a long runway in establishing new and reliable trading partnerships. Transitioning away from long-standing suppliers, particularly those based in countries like China and Mexico, requires significant time for vetting, logistics coordination, quality assurance, and cost analysis. As such, these shifts are not established overnight and are expected to extend well into 2026 and beyond, especially if current tariff structures remain in place. The trends observed during the first seven months of 2025 may therefore represent just the early phase of a broader, long-term realignment in global fastener sourcing.



Table 1. Product Subcategory Analysis

HS Code	2025 - JAN				2025 - JUL				Change			
	General Total Value CIF (USD)	%	General Quantity (KG)	%	General Total Value CIF (USD)	%	General Quantity (KG)	%	General Total Value CIF (USD)	%	General Quantity (KG)	%
731815 - Threaded screws and bolts others, with or without their nuts or washers, of iron or steel	275,566,229	44.18	79,326,164	48.77	242,587,289	43.36	74,694,700	48.78	-32,978,940	-11.97	-4,631,464	-5.84
731816 - Nuts, threaded, of iron or steel	132,496,867	21.24	30,317,233	18.64	124,507,388	22.26	28,166,328	18.40	-7,989,479	-6.03	-2,150,905	-7.10
731814 - Self-tapping screws, threaded, of iron or steel	112,505,825	18.04	34,662,490	21.31	103,439,266	18.49	33,995,455	22.21	-9,066,559	-8.06	-667,035	-1.93
731829 - Nonthreaded articles (fasteners) others, of iron or steel	34,295,544	5.50	3,699,743	2.28	29,099,102	5.21	3,229,908	2.11	-5,196,442	-15.16	-469,835	-12.70
731822 - Washers, other than lock washers, of iron or steel	29,919,807	4.80	8,242,803	5.07	23,814,275	4.26	7,081,629	4.63	-6,105,532	-20.41	-1,161,174	-14.09
731819 - Threaded articles of iron or steel others	14,583,675	2.34	1,563,102	0.97	13,301,468	2.38	1,508,377	0.99	-1,282,207	-8.80	-54,725	-3.51
731821 - Spring washers and other lock washers, of iron or steel	6,680,920	1.08	842,456	0.52	6,554,897	1.18	774,794	0.51	-126,023	-1.89	-67,662	-8.04
731824 - Cotter pins, of iron or steel	6,024,280	0.97	949,064	0.59	6,005,114	1.08	628,704	0.42	-19,166	-0.32	-320,360	-33.76
731823 - Rivets of iron or steel	5,713,153	0.92	792,741	0.49	4,526,301	0.81	750,132	0.49	-1,186,852	-20.78	-42,609	-5.38
731812 - Wood screws other than coach screws, threaded, of iron or steel	2,131,211	0.35	597,385	0.37	2,334,207	0.42	525,865	0.35	202,996	9.53	-71,520	-11.98
<b>Total</b>	<b>623,821,384</b>	<b>100</b>	<b>162,665,075</b>	<b>100</b>	<b>559,500,450</b>	<b>100</b>	<b>153,126,515</b>	<b>100</b>	<b>-64,320,934</b>	<b>-10.32</b>	<b>-9,538,560</b>	<b>-5.87</b>

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