Cross-Analysis of China-Taiwan Fastener Trade Statistics, January–July 2026

2026 年 1~7 月两岸紧固件贸易统计交叉解析

Competitive-Cooperative Dynamics Between China &Taiwan: Next Battle Over Markets / Products / Value Chain

The global fastener industry is entering a stage in which competition is gradually shifting from "volume" to "positioning within the supply chain." Tariffs, origin tracing, regionalized manufacturing, supply chain resilience, and geopolitics are reshaping the market landscape for fastener companies. In 2026, the EU continued to adjust its anti-dumping measures on Chinese steel fasteners, demonstrating that trade barriers facing Chinese fasteners in major markets have not disappeared. Meanwhile, global trade continues to grow, but is becoming increasingly fragmented and restructured. **For fastener companies in China and Taiwan, the real question is no longer simply "Who exports more?" but rather: Who controls the markets? Who controls high-value products? And who can remain in the supply chain as it undergoes restructuring?**

Using data from the General Administration of Customs of China, Taiwan International Trade Administration, and Taiwan Industrial Fasteners Institute (TIFI), this article cross-analyzes fastener import and export statistics from 2021 through January–July 2026. The data reveals a striking phenomenon: **China's advantage lies not only in its scale, but also in its diversified export destinations, while Taiwan's strengths are more closely associated with unit prices, product value, and high-end markets.**

China's Fasteners: Export Scale Recovers, but the Market Focus Is Shifting

According to data from the General Administration of Customs of China (***Figure 1***), China's fastener exports reached US$9.09 billion in 2021 and surged further to US$10.94 billion in 2022. They subsequently declined to US$9.14 billion in 2023 amid changes in global demand, inventory adjustments, and market conditions. Exports gradually recovered in 2024 and 2025, reaching US$10.04 billion in 2025. More significantly, China's fastener exports reached US$6.184 billion in January–July 2026, approximately 6.0% higher than the US$5.834 billion recorded during the same period of 2025. This indicates that Chinese fastener exports continue to expand despite considerable uncertainty in the global trade environment.

The most notable feature of China's market structure is that its dependence on the U.S. market is actually far lower than Taiwan's. During January–July 2026, the U.S. accounted for only about 12.7% of China's fastener exports, while the EU plus the UK accounted for approximately 18.5%. In contrast, ASEAN-10 plus Japan, South Korea, and India accounted for as much as 28.8%, while other markets accounted for

approximately 40.0%. In other words, China's fastener exports are not simply dependent on the U.S. market. Instead, China has developed a multi-core export structure spanning Asia, Europe, the Americas, and other emerging markets.

Figure 2 reveals an important signal: China's export growth is occurring not only in European and U.S. markets, but also extensively in Asian manufacturing bases and emerging markets. Vietnam, Thailand, Malaysia, and India are all important nodes in manufacturing and supply chain restructuring. **This gives Chinese fastener companies an advantage that is difficult for Taiwanese companies to replicate: enormous production capacity combined with highly diversified export markets.**

China's Imports: High-End Demand Still Exists, but Is Highly Concentrated

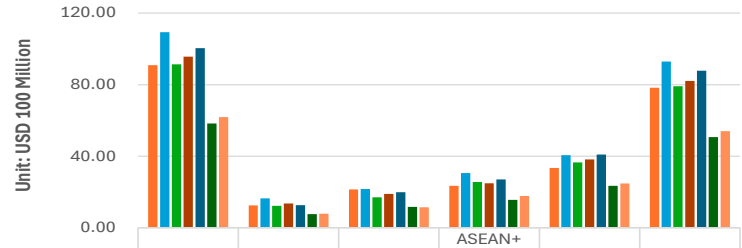
China's fastener imports are significantly smaller than its exports. According to the General Administration of Customs of China, fastener imports totaled US$2.354 billion in 2025, equivalent to approximately 23% of exports during the same year. Imports reached US$1.405 billion in January–July 2026. This "large exports, small imports" structure indicates that China's fastener industry has achieved a very high level of domestic supply capability. However, its import sources reveal another side of the market: China still relies on Japan, Germany, the U.S., Taiwan, Italy, and other countries for higher-value or specialized fasteners ***(Figure 3)***.

Taiwan ranked fourth among China's fastener import sources. During January–July 2026, fastener exports from Taiwan to China reached US$141 million, accounting for approximately 10% of China's total fastener imports. This demonstrates that Taiwan continues to hold a significant position in **China's supply chain. More importantly, China's fastener imports from Japan, Germany, and the U.S. totaled approximately US$769 million during January–July 2026, accounting for more than 54% of total fastener imports. This can be regarded as another side of China's fastener industry: although its large-scale manufacturing capabilities are mature, international suppliers still have room to compete in certain high-end, specialized, or high-value-added products.**

Taiwan's Fasteners: Export Scale Shrinks, but Unit Prices Rise

If the export value alone is considered, Taiwan is clearly not a match for China in terms of scale. ***Figure 4*** shows that Taiwan's fastener exports increased from US$5.319 billion in 2021 to US$6.141 billion in 2022, before declining for 3 consecutive years to US$4.201 billion in 2025. During January–July 2026, exports totaled US$2.359 billion, down 5.8% from US$2.506 billion during the same period of 2025.

Figure 1. Statistics on the Value of China's Fastener Exports to Various Countries



	World	U.S.A	EU+UK	ASEAN+ Japan/ S. Korea/ India	Other Countries	Non-U.S. Regions
2021	90.90	12.57	21.40	23.43	33.50	78.33
2022	109.36	16.48	21.67	30.60	40.61	92.88
2023	91.39	12.27	17.06	25.57	36.50	79.12
2024	95.64	13.54	18.97	24.86	38.27	82.10
2025	100.43	12.61	19.86	27.03	40.92	87.81
Jan-July 2025	58.34	7.62	11.64	15.58	23.5	50.72
Jan-July 2026	61.84	7.86	11.46	17.78	24.73	53.98

Data from the General Administration of Customs of China

Figure 2. Top 10 Export Destinations for Chinese Fasteners, January–July 2026 (Source: General Administration of Customs of China; Unit: USD 100 Million)

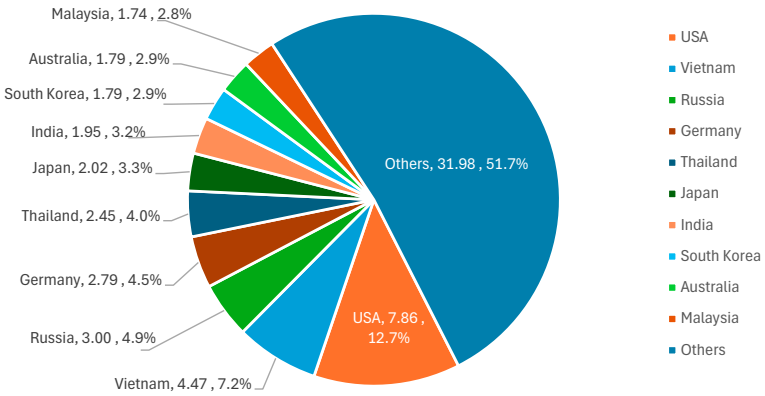
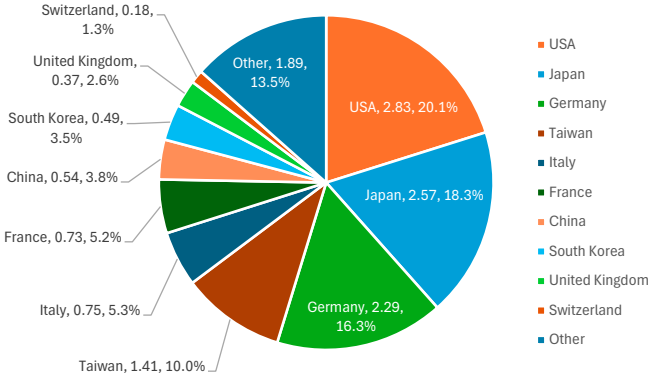


Figure 3. Top 10 Sources of Fastener Imports to China, January–July 2026 (Source: General Administration of Customs of China; Unit: USD 100 Million)



The most obvious difference between Taiwan and China is market concentration. During January–July 2026, approximately 41.5% of Taiwan's fastener exports were concentrated in the U.S., compared with only about 12.7% for China. Taiwan's fastener exports to the U.S. totaled approximately US$978 million, even higher than China's US$786 million during the same period. This is both Taiwan's strength and its greatest risk. On the one hand, it demonstrates **Taiwan's strong customer base and competitiveness in the U.S. market. On the other hand, as U.S. tariff policies, origin investigations, and supply chain localization continue to intensify, Taiwan's fastener industry faces significantly greater market concentration risk than China.**

Taiwan's Top 10 Export Destinations: Highly Concentrated in the U.S. and Advanced Industrial Markets

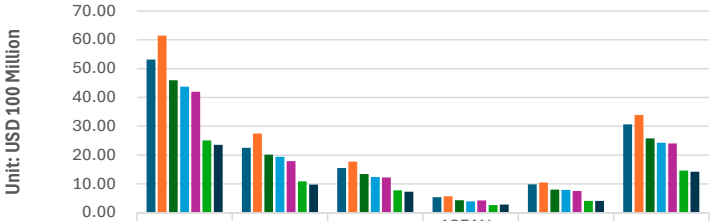
Figure 5 highlights an interesting difference between China and Taiwan. Among China's top 10 destinations are Vietnam, Thailand, India, and Malaysia, reflecting the importance of Asian manufacturing bases. Taiwan, by contrast, is clearly concentrated in mature industrial markets such as the U.S., Germany, Japan, Canada, and Mexico. If the two sides were to be summarized in a single sentence, **China is more like a "global large-scale supplier," while Taiwan is more like a "specialized supplier to mature industrial markets."** The challenge is that Taiwan must bear a higher degree of market concentration risk.

Taiwan's Imports: Small in Scale, but Highly Specialized in Supply Chain Structure

Taiwan's fastener imports are far below its exports. Total imports were only US$246 million in 2025 and US$156 million during January–July 2026.

Taiwan's fastener trade structure is therefore quite distinctive. Export value is more than 10 times import value, yet ***Figure 6*** shows that import sources are concentrated among technology-oriented suppliers such as Japan, the U.S., and Germany, as well as Asian supply chain partners including China, Vietnam, and Malaysia. This indicates that **Taiwan does not operate as a completely closed manufacturing system. Instead, it imports certain materials, specialized specifications, and products, then converts its own manufacturing capabilities into exports.**

Figure 4. Statistics on the Value of Taiwan's Fastener Exports to Various Countries



	World	U.S.A	EU+UK	ASEAN+ Japan/ S. Korea /India	Other Countries	Non-U.S. Regions
2021	53.19	22.50	15.51	5.36	9.82	30.69
2022	61.41	27.47	17.72	5.68	10.53	33.93
2023	46.00	20.16	13.48	4.37	7.99	25.84
2024	43.74	19.42	12.42	3.99	7.91	24.32
2025	42.01	17.94	12.27	4.27	7.52	24.07
Jan-July 2025	25.06	10.89	7.81	2.65	4.15	14.61
Jan-July 2026	23.59	9.78	7.30	2.83	4.11	14.24

Data from Taiwan International Trade Administration

Figure 5. Top 10 Export Destinations for Taiwanese Fasteners, January–July 2026 (Source: Taiwan International Trade Administration; Unit: USD 100 Million)

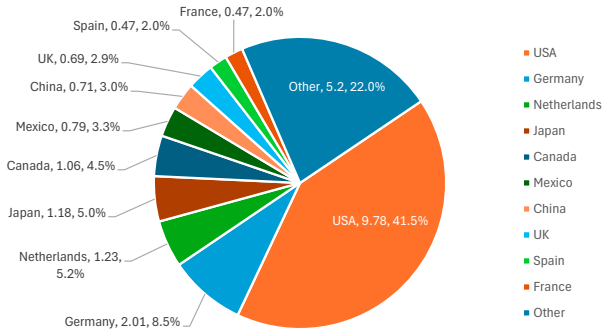
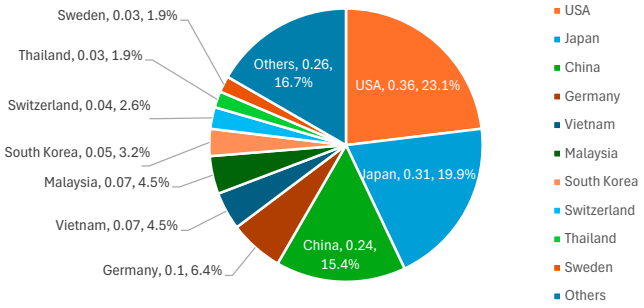


Figure 6. Top 10 Import Sources for Taiwanese Fasteners, January–July 2026 (Source: Taiwan International Trade Administration; Unit: USD 100 Million)



China Vs. Taiwan: The Export Scale Gap Is Clear, but the Real Difference Lies in "Volume" and "Price"

When China's and Taiwan's fastener statistics from their respective customs authorities are compared for January–July 2026, China's fastener exports totaled approximately US$6.184 billion, compared with approximately US$2.359 billion for Taiwan, meaning China's exports were about 2.6 times those of Taiwan. However, the more important indicators are "weight" and "unit price." According to comparable data from Taiwan Industrial Fasteners Institute, China's average fastener export price during January–July 2026 was approximately US$1.99/kg, while Taiwan's was approximately US$3.68/kg. In other words, **China's export weight of 3.303 million tons was approximately 5 times Taiwan's 665,700 tons, while Taiwan's average unit price was about 1.85 times China's.**

Taiwan is not competing with China in terms of production volume. Instead, it is seeking competitive space through unit value, product specifications, quality requirements, and customer applications. Product-level data from TIFI further confirms this difference. During

January–July 2026, China's bolt exports reached US$1.894 billion, nut exports US$1.040 billion, and self-tapping screw exports US$668 million. Taiwan's corresponding figures were approximately US$1.132 billion, US$499 million, and US$398 million, respectively. China holds a clear scale advantage in every major product category, but the unit prices of most Taiwanese products remain significantly higher than those of China. For example, during the same period, Taiwan's average bolt export price was approximately US$3.56/kg, compared with China's US$2.11/kg. For nuts, Taiwan averaged approximately US$4.08/kg, versus China's US$2.30/kg. This means that companies on the two sides are not competing through exactly the same model.

China's Strengths and Warning Signs: Scale Is Not an Eternal Moat

China's greatest strengths are its scale, cost competitiveness, comprehensive industrial chain, and ability to diversify its markets. During January–July 2026, China's fastener exports still increased by approximately 6% year on year, while exports to ASEAN plus Japan, South Korea, and India increased by more than 14%. Even amid trade pressure in the U.S. and European markets, China can absorb part of the demand through Asian and other emerging markets. But this also represents a warning sign. Continued expansion of China's export volume may intensify overseas concerns about "overcapacity and low-price competition." Discussions surrounding Chinese manufacturing exports and production capacity have recently intensified worldwide, with European industries in particular expressing concerns about the impact of Chinese manufacturing on domestic industries.

For Chinese fastener companies, the real challenge in the next stage is not simply to pursue greater production volume, but to avoid allowing "large-scale, low-price exports" to become a justification for trade barriers. Improving materials, heat treatment, surface treatment, special specifications, certification capabilities, and brand value will become more important than simply expanding capacity.

Taiwan's Strengths and Warning Signs: High Unit Prices Are Both a Moat and a Stress Test

Taiwan's greatest strengths are its unit prices and market quality. During January–July 2026, Taiwan's average fastener export price was approximately US$3.68/kg, significantly higher than China's US$1.99/kg. Taiwan also has a deep customer base in mature industrial markets such as the U.S., Germany, Japan, Canada, and Mexico. However, the data sends a very clear warning: Taiwan's export volume is shrinking, while its dependence on the U.S. market is too high. During January–July 2026, Taiwan's fastener export value declined by approximately 5.8% year on year, while export weight fell by 11.4%. Meanwhile, the average unit price increased by approximately 5.9%.

This is not necessarily bad news. It may indicate a structural shift toward a "lower volume, higher value" model in Taiwan: low-priced, low-value-added orders are declining, while the products that remain have a higher average value. However, if this trend develops into a combination of "lower volume, greater customer concentration, and declining capacity utilization," high unit prices may cease to be an advantage and instead become a source of cost pressure.

The Next Battle Is Who Can Adapt Faster to Supply Chain Restructuring

When the data from both sides is viewed together, a clear picture of the future emerges. **China needs to solve the problem of "converting scale into value," while Taiwan needs to solve the problem of "converting value into a larger market."** China cannot rely solely on price and production capacity. As the U.S., EU, and other markets place greater emphasis on origin, supply chain transparency, and trade fairness, the larger China's export scale becomes, the more likely it is to attract scrutiny.

Taiwan, meanwhile, cannot simply defend its position in the U.S. market. Taiwan's real task is not to abandon the U.S., but to maintain its advantage there while expanding its presence in Europe, India, ASEAN, the Middle East, and other emerging markets. Particularly noteworthy is that Taiwan's fastener exports to ASEAN-10 plus Japan, South Korea, and India totaled approximately US$283 million during January–July 2026, up about 6.6% year on year. The average unit price in this market was even higher, at approximately US$4.63/kg. By comparison, China exported approximately US$1.897 billion in fasteners to the same market, about 6.7 times Taiwan's exports, but its average unit price was approximately US$2.22/kg. This may be the market where Taiwan has the greatest potential to break through: rather than competing with China on price, Taiwan could replicate its "high-value supplier" model in markets where China has not yet fully established a high-value advantage.

Conclusion: China Needs to "Move Up," While Taiwan Needs to "Move Out"

The data ultimately leaves two very clear messages. **For China's fastener industry, export scale is no longer the problem; the next issue is value.** Faced with anti-dumping measures, tariffs, origin investigations, and growing global concerns over Chinese production capacity, Chinese companies must move beyond being a "manufacturing powerhouse" and become "high-value suppliers." Otherwise, larger export volumes may bring greater trade friction. For Taiwan's fastener industry, product value is not the problem; the next issue is the market. Taiwan enjoys significantly higher export unit prices than China and has established customers in mature industrial markets. However, excessive dependence on the U.S. market exposes the industry to tariffs, policy changes, and shifts in demand.

The next stage of competition between the fastener industries of China and Taiwan can therefore be summarized in two sentences: **China must move from "volume" to "value," while Taiwan must move from "value" to "diversified volume."** If China can convert its scale into technology, quality, and brand value, and if Taiwan can replicate its high-unit-value capabilities across more markets, both sides will still have room to grow. But if China continues to rely on low-price expansion while Taiwan remains heavily dependent on a single market, the statistics revealed in this analysis will represent more than competitive advantages—they may gradually become warning signals for the next stage of industry development. ■

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