

2025 Outlook for the U.S. Fastener Tool Marketing

2025美國緊固工具行銷展望

Data note: The data for this article is derived from the US Census trade statistics. US Census trade statistics analyze imports and exports on all modes of transportation. That value is calculated in USD by general FOB for imports and FOB for exports. Fasteners in this article are defined as any product under HS Codes 8204 (hand operated spanners and wrenches), 8207 (interchangeable tools for hand tools), and 8205 (hand tools others, blow torches). The volume in terms of mass is recorded in Gross Weight (KG).

As the U.S. fastening tools market approaches the second quarter of 2025, it navigates a dynamic trade landscape marked by shifting global supply chain uncertainties, evolving trade politics and fluctuating economic conditions. The U.S. remains a significant player in global trade, importing both essential components and materials as well as finished products while also exporting advanced fastening solutions to its primary trading partners. Recent trade patterns have been influenced by economic recovery post-pandemic, strategic reshoring initiatives, and ongoing tariff impacts, impacting industries like manufacturing, automotive and construction. As market demand steadily increased, understanding these trade dynamics becomes crucial to anticipating opportunities and overcoming challenges in the fastening tools market over the next several years.



Cross Border Dynamics: U.S. Trade Insights and Global Partnerships

In February 2025, U.S. fastening tool imports declined by nearly 9% in total FOB USD value and 11% in gross weight (kg) compared to January. Taiwan remained the top trading partner, accounting for over 36% of total import value, followed by China at approximately 24%. Meanwhile, Vietnam saw a notable 35% increase in fastening tool trade with the U.S., suggesting U.S. companies diversified their supply chains ahead of anticipated tariffs. Imports of interchangeable tools (HS 820790) increased by 8%, whereas other fastening tool categories declined by over 10%. The majority of these imports continued to enter the U.S. via west coast port districts, particularly Los Angeles, CA, and Seattle, WA.

▼ U.S. Fastening Tools Import in Jan.-Feb. 2025 (by Country)

Country of Origin	2025 - JAN				2025 - FEB				Volume Change			
	FOB Value (USD)	%	Gross Weight (Kg.)	%	FOB Value (USD)	%	Gross Weight (Kg.)	%	FOB Value (USD)	%	Gross Weight (Kg.)	%
TAIWAN	49,763,211	38.34	4,841,456	32.16	43,028,352	36.41	4,101,383	30.69	-6,734,859	-13.54	-740,073	-15.29
CHINA	33,178,894	25.56	6,209,771	41.25	28,219,753	23.88	5,468,396	40.92	-4,959,141	-14.95	-741,375	-11.94
VIETNAM	10,361,542	7.99	1,467,894	9.75	14,062,694	11.90	1,925,039	14.41	3,701,152	35.73	457,145	31.15
GERMANY	8,077,463	6.23	285,541	1.90	5,816,747	4.93	101,372	0.76	-2,260,716	-27.99	-184,169	-64.50
INDIA	5,673,286	4.38	1,275,781	8.48	4,674,536	3.96	1,005,583	7.53	-998,750	-17.61	-270,198	-21.18
CZECH REPUBLIC	2,659,344	2.05	55,933	0.38	2,951,871	2.50	59,170	0.45	292,527	11.00	3,237	5.79
CAMBODIA	2,649,925	2.05	316,542	2.11	1,473,295	1.25	187,457	1.41	-1,176,630	-44.41	-129,085	-40.78
CANADA	2,076,022	1.60	1,103	0.01	2,848,694	2.42	953	0.01	772,672	37.22	-150	-13.60
ITALY	2,043,919	1.58	85,527	0.57	2,107,808	1.79	31,961	0.24	63,889	3.13	-53,566	-62.64
THAILAND	1,404,497	1.09	153,939	1.03	1,282,236	1.09	143,445	1.08	-122,261	-8.71	-10,494	-6.82
Total	129,815,619	100	15,056,928	100	118,197,102	100	13,366,157	100	-11,618,517	-8.96	-1,690,771	-11.23

▼ U.S. Fastening Tools Import in Jan.-Feb. 2025 (by HS Code)

HS Code	2025 - JAN				2025 - FEB				Volume Change			
	FOB Value (USD)	%	Gross Weight (Kg.)	%	FOB Value (USD)	%	Gross Weight (Kg.)	%	FOB Value (USD)	%	Gross Weight (Kg.)	%
820420 - SOCKET WRENCHES WITH OR WITHOUT HANDLES, DRIVES AND EXTENSIONS, AND PARTS THEREOF, OF BASE METAL	38,155,045	29.40	5,332,937	35.42	31,413,133	26.58	4,548,403	34.03	-6,741,912	-17.67	-784,534	-14.72
820790 - INTERCHANGEABLE TOOLS OTHERS, AND PARTS THEREOF, OF BASE METAL	34,237,106	26.38	2,082,073	13.83	37,134,508	31.42	2,251,763	16.85	2,897,402	8.47	169,690	8.16
820411 - SPANNERS AND WRENCHES, HAND-OPERATED, NON-ADJUSTABLE, AND PARTS THEREOF, OF BASE METAL	26,657,816	20.54	3,870,688	25.71	23,974,302	20.29	3,373,676	25.25	-2,683,514	-10.07	-497,012	-12.85
820540 - SCREWDRIVERS, AND PARTS THEREOF, OF BASE METAL	16,941,075	13.06	1,885,155	12.53	13,312,339	11.27	1,386,947	10.38	-3,628,736	-21.42	-498,208	-26.43
820412 - SPANNERS AND WRENCHES, HAND-OPERATED, ADJUSTABLE, AND PARTS THEREOF, OF BASE METAL	13,824,577	10.65	1,886,075	12.53	12,362,820	10.46	1,805,368	13.51	-1,461,757	-10.58	-80,707	-4.28
Total	129,815,619	100	15,056,928	100	118,197,102	100.00	13,366,157	100	-11,618,517	-8.96	-1,690,771	-11.23

Historically, Taiwan and China have been the primary trading partners for the U.S., collectively accounting for approximately 60–70% of total fastening tool imports. In 2024, Taiwan represented 38% of the total FOB value of imports, while China contributed 25%.

Regarding import volumes, the U.S. predominantly sources socket wrenches (HS 820420) from Taiwan, accounting for nearly 53% of the total annual volume from the country. In contrast, China provides nearly equal volumes of socket wrenches (HS 820420) and non-adjustable hand-operated spanners and wrenches (HS 820411), which altogether constitute approximately 55% of its annual shipments to the U.S. In both 2023 and 2024, Vietnam emerged as the third-largest trading partner, supplying more than 10% of the annual import volume, primarily in interchangeable tools (HS 820790) and non-adjustable spanners and wrenches (HS 820411).



▼ U.S. Fastening Tools Import in 2022-2024 (by Country)

Country of Origin	2022				2023				2024			
	FOB Value (USD)	%	Gross Weight (Kg.)	%	FOB Value (USD)	%	Gross Weight (Kg.)	%	FOB Value (USD)	%	Gross Weight (Kg.)	%
TAIWAN	596,475,732	40.19	62,923,918	38.15	518,244,368	39.28	50,430,264	35.87	540,779,833	38.05	52,627,991	33.56
CHINA	432,628,501	29.15	69,433,202	42.10	337,243,495	25.56	58,914,614	41.90	357,111,847	25.13	62,474,032	39.83
VIETNAM	82,486,836	5.56	11,705,815	7.10	99,082,595	7.51	13,645,506	9.71	143,169,098	10.08	20,035,821	12.78
GERMANY	91,016,908	6.14	1,984,904	1.21	85,115,091	6.45	1,795,626	1.28	84,086,615	5.92	2,039,101	1.30
INDIA	58,242,423	3.93	11,986,805	7.27	48,404,659	3.67	9,725,461	6.92	55,012,965	3.88	11,899,978	7.59
CZECH REPUBLIC	23,239,547	1.57	504,777	0.31	23,895,634	1.82	518,097	0.37	26,213,850	1.85	597,571	0.39
CANADA	21,309,017	1.44	161,850	0.10	22,088,110	1.68	31,638	0.03	24,835,689	1.75	25,817	0.02
JAPAN	19,643,196	1.33	517,785	0.32	19,550,084	1.49	315,063	0.23	21,218,437	1.50	363,615	0.24
ITALY	19,703,089	1.33	695,896	0.43	16,346,270	1.24	579,279	0.42	19,206,483	1.36	660,374	0.43
MEXICO	18,096,511	1.22	17,012	0.02	21,835,652	1.66	9,207	0.01	17,824,492	1.26	4,125	0.01
Total	1,484,469,613	100	164,947,729	100	1,319,684,999	100	140,616,499	100	1,421,477,775	100	156,857,782	100

In terms of exports, the U.S. predominantly ships fastening tools to Canada and Mexico, collectively representing 39% of total export volume in February 2025. Notably, U.S. exports to Mexico surged by 346% in gross weight (kg), despite a corresponding decline of nearly 30% in FOB value, indicating a shift toward exporting higher volumes of lower-priced fastening tools or adjustments in market pricing dynamics. Additionally, exports to significant markets such as Japan, China, and Germany experienced notable increases in value in February 2025 compared to January, highlighting a strengthening demand in these international markets.

▼ U.S. Fastening Tools Export in Jan.-Feb. 2025 (by Country)

Country of Destination	2025 - JAN				2025 - FEB				Volume Change			
	Gross Weight (Kg.)	%	FOB Value (USD)	%	Gross Weight (Kg.)	%	FOB Value (USD)	%	Gross Weight (Kg.)	%	FOB Value (USD)	%
CANADA	3,745	0.96	13,203,762	31.07	3,872	0.81	11,381,376	26.72	127	3.40	-1,822,386	-13.81
MEXICO	2,671	0.69	7,841,255	18.46	11,914	2.50	5,494,414	12.90	9,243	346.06	-2,346,841	-29.93
GERMANY	19,854	5.06	2,242,232	5.28	28,437	5.95	2,560,269	6.01	8,583	43.24	318,037	14.19
UNITED KINGDOM	27,103	6.91	1,829,028	4.31	15,103	3.16	2,077,440	4.88	-12,000	-44.28	248,412	13.59
JAPAN	12,008	3.07	1,667,634	3.93	22,227	4.65	2,660,889	6.25	10,219	85.11	993,255	59.57
AUSTRALIA	39,012	9.95	1,362,397	3.21	29,169	6.11	1,277,751	3.00	-9,843	-25.24	-84,646	-6.22
BAHAMAS	15,419	3.93	1,063,051	2.51	2,978	0.63	95,042	0.23	-12,441	-80.69	-968,009	-91.06
ITALY	16,621	4.24	1,005,606	2.37	7,174	1.51	673,644	1.59	-9,447	-56.84	-331,962	-33.02
SINGAPORE	6,874	1.76	751,704	1.77	3,437	0.72	583,225	1.37	-3,437	-50.00	-168,479	-22.42
CHINA	9,837	2.51	738,337	1.74	26,455	5.54	1,049,880	2.47	16,618	168.94	311,543	42.20
Total	392,374	100	42,498,888	100	478,098	100	42,606,495	100	85,724	21.85	107,607	0.26

Overall, the U.S. export volume for fastening tools rose by approximately 22% month-over-month from January to February 2025. Spanners and wrenches (HS 820411) and interchangeable tools (HS 820730) comprised the bulk of these exports, underscoring continued global demand for these product categories.

Historically, Canada and Mexico have consistently remained the top trading partners, together accounting for about 47% of the total annual FOB export value in recent years. Interchangeable tools (HS 820790) are particularly prominent in exports to Mexico, representing 59% of total FOB export value in 2024, followed by spanners and wrenches (HS 820411), which accounted for nearly 21%. This trend underscores Mexico's strong reliance on U.S.-manufactured fastening solutions, reflecting broader cross-border industrial cooperation and supply chain integration.



▼ U.S. Fastening Tools Export in Jan.-Feb. 2025 (by HS Code)

HS Code	2025 - JAN				2025 - FEB				Volume Change			
	FOB Value (USD)	%	Gross Weight (Kg.)	%	FOB Value (USD)	%	Gross Weight (Kg.)	%	FOB Value (USD)	%	Gross Weight (Kg.)	%
820790 - INTERCHANGEABLE TOOLS OTHERS, AND PARTS THEREOF, OF BASE METAL	89,525	22.82	15,816,783	37.22	116,715	24.42	16,639,596	39.06	27,190	30.38	822,813	5.21
820411 - SPANNERS AND WRENCHES, HAND-OPERATED, NON-ADJUSTABLE, AND PARTS THEREOF, OF BASE METAL	119,065	30.35	12,741,612	29.99	138,429	28.96	14,156,976	33.23	19,364	16.27	1,415,364	11.11
820420 - SOCKET WRENCHES WITH OR WITHOUT HANDLES, DRIVES AND EXTENSIONS, AND PARTS THEREOF, OF BASE METAL	63,238	16.12	7,539,211	17.74	79,582	16.65	5,820,751	13.67	16,344.00	25.85	-1,718,460	-22.80
820412 - SPANNERS AND WRENCHES, HAND-OPERATED, ADJUSTABLE, AND PARTS THEREOF, OF BASE METAL	92,644	23.62	3,527,312	8.30	122,353	25.60	3,612,026	8.48	29,709	32.07	84,714	2.41
820540 - SCREWDRIVERS, AND PARTS THEREOF, OF BASE METAL	27,902	7.12	2,873,970	6.77	21,019	4.40	2,377,146	5.58	-6,883	-24.67	-496,824	-17.29
Total	392,374	100	42,498,888	100	478,098	100	42,606,495	100	85,724	21.85	107,607	0.26

▼ U.S. Fastening Tools Export in 2022-2024 (by Country)

Country of Destination	2022				2023				2024			
	FOB Value (USD)	%	Gross Weight (Kg.)	%	FOB Value (USD)	%	Gross Weight (Kg.)	%	FOB Value (USD)	%	Gross Weight (Kg.)	%
CANADA	79,277	1.36	162,963,369	31.34	65,664	1.09	181,904,644	32.94	61,081	1.11	171,070,839	31.93
MEXICO	41,914	0.72	77,825,699	14.97	45,025	0.75	90,420,731	16.38	37,013	0.67	87,929,697	16.42
UNITED KINGDOM	286,316	4.90	24,047,479	4.63	213,989	3.55	23,238,256	4.21	377,461	6.84	30,217,135	5.64
JAPAN	294,310	5.04	30,565,460	5.88	264,542	4.38	28,057,263	5.09	232,761	4.22	26,229,123	4.90
GERMANY	255,273	4.37	21,256,690	4.09	308,392	5.11	21,557,169	3.91	308,744	5.59	23,574,997	4.40
AUSTRALIA	605,452	10.36	25,619,262	4.93	553,161	9.16	22,485,116	4.08	384,407	6.96	18,617,089	3.48
CHINA	203,008	3.48	16,334,781	3.15	321,979	5.33	11,971,591	2.17	245,801	4.45	12,857,846	2.40
SINGAPORE	250,601	4.29	8,945,060	1.72	182,003	3.02	10,288,134	1.87	104,777	1.90	10,515,790	1.97
NETHERLANDS	82,872	1.42	6,316,843	1.22	124,407	2.06	7,686,625	1.40	104,826	1.90	7,944,656	1.49
S. KOREA	122,886	2.11	7,358,126	1.42	121,755	2.02	6,684,358	1.22	162,498	2.95	7,878,918	1.48
Total	5,849,419	100	520,103,960	100	6,040,930	100	552,302,484	100	5,524,974	100	535,826,712	100



▼ U.S. Fastening Tools Export in 2022-2024 (by HS Code)

HS Code	2025 - JAN				2025 - FEB				Volume Change			
	FOB Value (USD)	%	Gross Weight (Kg.)	%	FOB Value (USD)	%	Gross Weight (Kg.)	%	FOB Value (USD)	%	Gross Weight (Kg.)	%
820790 - INTERCHANGEABLE TOOLS OTHERS, AND PARTS THEREOF, OF BASE METAL	1,421,046	24.30	207,452,609	39.89	1,443,625	23.90	202,553,197	36.68	1,283,810	23.24	202,467,452	37.79
820411 - SPANNERS AND WRENCHES, HAND-OPERATED, NON-ADJUSTABLE, AND PARTS THEREOF, OF BASE METAL	1,807,614	30.91	163,605,843	31.46	1,853,247	30.68	184,104,956	33.34	1,710,091	30.96	174,246,892	32.52
820420 - SOCKET WRENCHES WITH OR WITHOUT HANDLES, DRIVES AND EXTENSIONS, AND PARTS THEREOF, OF BASE METAL	919,856	15.73	73,406,248	14.12	894,959	14.82	83,085,902	15.05	876,451	15.87	79,931,024	14.92
820412 - SPANNERS AND WRENCHES, HAND-OPERATED, ADJUSTABLE, AND PARTS THEREOF, OF BASE METAL	1,280,025	21.89	42,436,887	8.16	1,488,161	24.64	48,314,855	8.75	1,281,972	23.21	46,073,603	8.60
820540 - SCREWDRIVERS, AND PARTS THEREOF, OF BASE METAL	420,878	7.20	33,202,373	6.39	360,938	5.98	34,243,574	6.21	372,650	6.75	33,107,741	6.18
Total	5,849,419	100	520,103,960	100	6,040,930	100	552,302,484	100	5,524,974	100	535,826,712	100



Challenges and Market Restraints

Despite positive trade trends, the U.S. fastening tools market faces significant challenges and restraints moving forward. The newly imposed tariffs on April 2, 2025, affecting all imported goods, including fastening tools, present a major hurdle. These tariffs are likely to increase costs for U.S. importers, manufacturers, and ultimately consumers, potentially slowing market growth due to elevated prices and reduced profit margins. **The April 2nd tariffs include an additional 34% tariff on all Chinese imports, supplementing existing duties to reach a cumulative rate of 54%.** Taiwanese imports are subject to a new 32% tariff. Additionally, the imposition of these tariffs raises concerns about reciprocal tariffs from major trading partners, particularly Taiwan, China, and Vietnam, which could lead to strained trade relations and further market disruptions. The country-specific reciprocal tariffs on nations with significant trade surpluses with the U.S. were commenced on April 9, 2025. The risk of retaliatory measures could impact export volumes and competitiveness of U.S. fastening tools abroad. Supply chain instability, exacerbated by these tariffs and the threat of reciprocal action, poses another critical challenge, prompting companies to reconsider sourcing strategies, diversify their supplier base, and possibly shift toward domestic manufacturing to mitigate the impact of global trade tensions.



Outlook 2025: Navigating Uncertainty and Seizing Opportunities

Looking ahead, the U.S. fastening tools market in 2025 stands at a pivotal point, shaped by dynamic trade relationships, evolving economic conditions, and technological advancements. Although new tariffs introduce uncertainties and potential disruptions, they also **present opportunities for domestic suppliers and manufacturers to strengthen their positions by enhancing production capabilities and embracing innovation, including automation and smart fastening technologies.** Industry stakeholders must remain agile, adapting quickly to changing trade policies, diversifying supply chains, and capitalizing on growth areas such as infrastructure projects, automotive production, and advanced manufacturing. Success will depend on strategic foresight, proactive risk management, and continuous investment in technological innovation, ensuring sustained competitiveness and resilience in a rapidly evolving global market landscape.

The evolving landscape also emphasizes a notable shift toward sustainability and environmentally friendly practices within the fastening tools industry. **Growing regulatory pressures and increased consumer awareness are driving demand for more sustainable and recyclable materials, energy-efficient manufacturing processes, and eco-conscious product designs.** Industry leaders and manufacturers in the U.S. are increasingly investing in research and development to meet these sustainability objectives, creating opportunities for competitive differentiation. Adopting sustainable practices not only aligns companies with regulatory trends but also enhances their appeal to environmentally conscious customers, providing a strategic advantage in a highly competitive marketplace. ■

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