

2024-2025 第一季波蘭扣件和緊固工具貿易統計

Trade Statistics of Fasteners and Fastening Tools of Poland in 2024-Q1 2025



Market Landscape and Economic Context

Poland's economy expanded by 2.9% in 2024 despite pressures from energy costs and EU Green Deal transitions. Industrial output particularly in automotive, white goods, and general machinery remains a major contributor to its GDP, accounting for nearly 22% as of late 2024 (Statistics Poland, 2025). This industrial strength supports robust demand for both basic and specialty fasteners, alongside a growing appetite for advanced fastening tools.

According to data from the Polish Agency for Enterprise Development (PARP), Poland imported approximately €214 million worth of fasteners and fastening components in 2024, marking a 4.1% year-over-year increase. At the same time, exports reached €176 million, with a strong presence in markets such as Germany, the Czech Republic, Slovakia, and Sweden. Much of this trade focuses on bolts, screws, nuts, washers, and rivets made of steel, brass, or aluminum.

The fastening tool market also registered a noticeable expansion, with total imports of power-driven tools valued at over €96 million, supported by demand across automotive plants, construction sites, and light manufacturing facilities.

Demand Drivers: Sectoral Breakdown

1. Automotive and Transportation

Poland is one of Europe's largest vehicle component producers, housing over 300 tier-1 and tier-2 automotive suppliers. Electric vehicle (EV) production continues to rise in Katowice and Lower Silesia, driving up the use of lightweight aluminum fasteners, blind rivets, and vibration-resistant locking systems. These trends correspond with Poland's export of specialized automotive fasteners valued at €64 million in 2024 alone (Eurostat, 2025).

2. Construction and Infrastructure

Fastener consumption in Poland's construction sector rose by 6.3% in 2024, according to the National Association of Construction Manufacturers. EU recovery funds and public-private partnerships continue to support road, rail, and residential projects. This has significantly increased demand for anchor bolts, heavy-duty expansion plugs, and galvanized steel fasteners.

3. Household Appliances and General Manufacturing

As a major production hub for appliances and consumer electronics, Poland's manufacturing sector uses high volumes of small-diameter screws, captive fasteners, and torque-controlled assembly tools. The sector's output grew 5.4% in 2024, according to GUS (2025), amplifying domestic consumption of high-precision fasteners and related tooling systems.

Fastening Tool Market Trends

The fastening tool segment in Poland is evolving with a clear shift toward digitized and ergonomic solutions. Key trends in 2024-Q1 2025 include:



- **Cordless Electric Tools:** Demand surged by 8.1%, led by battery-operated torque wrenches, impact drivers, and angle grinders.
- **Smart Assembly Tools:** Increasingly adopted in automotive and aerospace manufacturing. These tools allow for torque verification, data logging, and MES integration.
- **Growth in SME Usage:** Affordable imports from Taiwan, Germany, and China have increased availability among SMEs involved in furniture, metalwork, and machine maintenance.

Retail and B2B e-commerce for fastening tools also gained momentum, now comprising roughly 27% of total sales, particularly among younger and digitally inclined buyers.

Trade Statistics Snapshot (2024 – Q1 2025)

The table below summarizes Poland's key fastener-related trade figures for 2024 (source: Eurostat, UN Comtrade, 2025):

Category	2024 Import Value (€)	2024 Export Value (€)	YoY Growth (%)
Industrial Fasteners (HS 7318)	214 million	176 million	+4.1
Power Fastening Tools (HS 8467)	96 million	61 million	+6.7
Automotive Fasteners (subset)	81 million	64 million	+5.3
Construction Fasteners (subset)	32 million	21 million	+6.8

These data reflect a broadly expanding market, with **construction fasteners** and **power tools** showing the highest annual growth rates, supported by strong

public infrastructure spending and industrial automation. The automotive segment maintains solid export strength due to Poland's role as a Tier-1 supplier in Europe. Meanwhile, the industrial fastener category, though growing more modestly, still represents the highest total trade value, confirming its foundational role in Poland's manufacturing ecosystem.

Regional Trade and Supply Chain Integration

Poland remains one of Central Europe's largest re-exporters of industrial components, acting as a logistics hub for both EU and non-EU flows. According to Volza export shipment data, Poland conducted over 140 distinct fastener export shipments in Q1 2025 alone, with consistent volumes to Hungary, the Czech Republic, Romania, and Germany.

The country's bonded warehouse infrastructure, road-rail connectivity, and special economic zones (e.g., Katowice Special Economic Zone) enhance its appeal for multinational producers seeking just-in-time supply networks for fasteners and associated tools.

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Constraints and Market Risks

Raw Material Volatility

Fluctuating steel and aluminum prices remain a challenge. Steel input costs rose by 7.5% in late 2024, squeezing margins for smaller fastener producers and importers reliant on raw material precision.

Labor and Training Gaps

While Poland offers a well-educated technical workforce, skill shortages in CNC machining, robotics, and digital tool operation are emerging. This poses a barrier to deeper adoption of advanced fastening technology.

Regulatory Pressures

Changes to EU carbon disclosure, REACH compliance, and the incoming Ecodesign requirements for tools are expected to increase costs, particularly for imported fastening systems and subcomponents.

Strategic Outlook and Recommendations

For Manufacturers

- Invest in corrosion-resistant, weight-optimized fasteners for EV and aerospace clients.
- Embrace digital twin simulation to optimize fastening system design.
- Consider co-locating production with tool providers to create bundled offerings.

For Distributors and Tool Retailers

- Expand digital catalogs and support for e-commerce platforms.
- Integrate after-sales service and tool calibration to enhance value-added offerings.
- Target Tier-2 manufacturing firms with modular fastening tool kits.

For Policymakers

- Promote technical education in tool calibration, automation, and mechatronics.

- Simplify certification for SMEs under new EU procurement rules.
- Strengthen bilateral trade facilitation with Baltic and Balkan markets to diversify exports.

Conclusion

Poland's fastener and fastening tool sector in 2024–Q1 2025 reflects a growing, strategically vital industry aligned with national manufacturing strengths and EU industrial strategies. As automation and electrification redefine product requirements, Poland's trade data underscores both opportunity and pressure to innovate. With continued investment in infrastructure, tooling technology, and workforce development, the country is well-positioned to become a regional leader in fastening systems over the next decade. ▣

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