

How the US-EU Tariff Deal Rewires Auto Supply & Fasteners

美歐關稅協議如何重塑汽車供應鏈與扣件產業格局

Data note: The data for this article is derived from the Eurostat trade statistics. Eurostat trade statistics analyze imports and exports on all modes of transportation. That value is calculated in USD FOB Value and Net Weight (kg.) for exports. The HS Codes used in this article are 8703 (motor cars and other motor vehicles designed to transport people other than public transportation type) and 7318 (screws, bolts, nuts, coach screws, screw hooks, rivets, cotters, cotter pins, washer and similar articles of iron or steel).

A new transatlantic trade deal is shaking up the cost of doing business in the auto world. Under the recently announced U.S.-EU trade framework, most European goods now face a 15% tariff floor, including cars. While tariffs on EU-built vehicles are conditionally being brought down to that level, steel and aluminum remain in limbo, with negotiations still unresolved. The spotlight, however, is squarely on the auto industry—the largest single export channel from Europe to the United States. In 2024 alone, nearly US\$42 billion worth of EU-manufactured passenger cars rolled into the U.S. market. That flow is now subject to a new cost calculus. For automakers, the shift means tough choices about pricing, production strategies, and whether to bring more operations stateside. And for the fastener industry—tightly intertwined with automotive supply chains—the ripple effects are immediate: higher import costs, stronger incentives for localized sourcing, and fresh uncertainty over whether future quotas could sweep in steel and aluminum fasteners.

A Timeline of the 2025 U.S.-EU Trade Dispute and Its Lingering Fallout

In a rapidly escalating trade standoff, the U.S. reignited tensions with Europe by raising tariffs on steel and aluminum imports to 25% on March 12, 2025, under Section 232 of U.S. trade law. This move triggered a swift global response, with the EU retaliating by announcing tariffs on US\$23 billion worth of American goods, phased in from April through year's end. Meanwhile, the current administration doubled down in April by implementing a sweeping 10% "reciprocal tariff" on most imports—though it faced immediate legal challenges. By early

June, the U.S. had expanded these tariffs to 50% on metals and extended them further to cover appliances and over 400 derivative products, despite EU warnings and growing industry unease. Talks intensified in June, but with no full deal in sight by the July 9 deadline, European Commission President Ursula von der Leyen pivoted to pursuing a more political "agreement in principle."

That framework was unveiled on July 27, when President Trump and von der Leyen announced a compromise: most EU goods would now face a 15% U.S. tariff—down from a threatened 30%—while strategic goods like aircraft remained exempt. However, steel and aluminum were notably left out, remaining under a punishing 50% tariff. The following day, both sides revealed plans for a "metals alliance" to explore a quota-based system (TRQs) to address global overcapacity—particularly from China. A more formal "Agreement on Reciprocal, Fair, and Balanced Trade" was outlined on August 21, pledging deeper cooperation on tariff realignment and industrial investment. Yet by late August while the EU signaled willingness to eliminate some industrial tariffs to gain reduced car duties, no progress had been made on metals. European industry leaders—especially in steel—continued to criticize the deal's ambiguity and burden, as critical details on quotas and tariff relief remained elusive.

The EU's Fastener and Auto Exports to the U.S. in Numbers

During the first half of 2025, the European Union exported US\$18.6 billion worth of automobiles to the United States, with



Germany accounting for a dominant 67% of that total. Other major EU exporters included Italy (8.5%), Slovakia (7.7%), and Sweden (7.5%). Monthly figures show a strong start to the year: exports totaled US\$3.1 billion in January, rising to US\$3.6 billion in both February and March. However, shipments declined in the second quarter, dipping to US\$2.9 billion in April, US\$2.4 billion in May, and US\$2.7 billion in June—a downward trend that analysts attribute in part to ongoing uncertainty surrounding transatlantic tariff negotiations. In a broader view, 2024 saw total EU auto exports to the U.S. reach US\$42.2 billion, slightly below the US\$43.8 billion posted in 2023. **Among the top automotive export categories are HS Code 870323 (passenger vehicles with spark ignition), 870340 (hybrid vehicles), and 870324 (larger-capacity spark ignition vehicles),** which remain the backbone of EU-to-U.S. trade in the automotive sector.

EU Exports of 8703 to the US (Year over Year Trend, 2022-2025)

HS Code (6)	2022				2023			
	FOB Value (USD)	%	Net Weight (Kg.)	%	FOB Value (USD)	%	Net Weight (Kg.)	%
870323 - passenger motor vehicles with spark-ignition internal combustion reciprocating piston engine, cylinder capacity over 1,500 cc but not over 3,000 cc	15,482,066,775.41	40.54	640,505,553	45.92	20,458,430,565.43	46.64	821,803,324	50.55
870340 - passenger motor vehicles, with both spark-ig intrnl combust and electric motor, other than those charges by pluggin to external electric power	9,099,378,842.42	23.83	338,104,787	24.24	5,446,679,114.06	12.42	226,317,701	13.92
870324 - passenger motor vehicles with spark-ignition internal combustion reciprocating piston engine, cylinder capacity over 3,000 cc	6,117,274,774.76	16.02	100,274,555	7.19	7,209,748,599.32	16.44	121,567,561	7.48
870380 - motor vehicles with only electric motor, others	5,301,280,818.90	13.88	201,748,045	14.47	7,514,724,880.02	17.13	288,778,055	17.77
870360 - motor vehicles with both spark-ig and electric motor, capable of charge by plugging to extnl pwr	1,505,152,757.02	3.95	60,748,909	4.36	2,417,209,682.25	5.51	110,282,986	6.79
870322 - passenger motor vehicles with spark-ignition internal combustion reciprocating piston engine, cylinder capacity over 1,000 cc but not over 1,500 cc	543,766,981.35	1.43	46,091,341	3.31	608,712,574.67	1.39	47,538,056	2.93
870333 - passenger motor vehicles with compression-ignition internal combustion piston engine (diesel), cylinder capacity over 2,500 cc	61,095,275.17	0.16	2,836,891	0.21	17,360,247.81	0.04	498,079	0.04
870350 - motor vehicles, with both compres-ig internal combust piston engine (diesel/semi-diesel) and electric motor,not charged by plug	45,029,004.64	0.12	1,651,313	0.12	55,006,238.22	0.13	2,001,833	0.13
870332 - passenger motor vehicles with compression-ignition internal combustion piston engine (diesel), cylinder capacity over 1,500 cc but not over 2,500 cc	19,575,409.51	0.06	2,204,451	0.16	122,209,606.40	0.28	6,496,747	0.40
870321 - passenger motor vehicles with spark-ignition internal combustion reciprocating piston engine, cylinder capacity not over 1,000 cc	9,764,601.47	0.03	668,533	0.05	9,387,169.36	0.03	473,905	0.03
870390 - passenger motor vehicles, others	5,646,194.56	0.02	46,604	0.01	6,464,782.52	0.02	81,768	0.01
870310 - passenger motor vehicles specially designed for traveling on snow; golf carts and similar vehicles	5,007,820.40	0.02	115,757	0.01	4,208,693.97	0.01	100,047	0.01
870331 - passenger motor vehicles with compression-ignition internal combustion piston engine (diesel), cylinder capacity not over 1,500 cc	830,343.84	0.01	80,513	0.01	486,583.99	0.01	56,971	0.01
870370 - motor vehicles, with both compression-ignition internal combustion (diesel/semi-diesel and electric motor, capable of charged by plugging	41,502.23	0.01	1,785	0.01	0.00	0.00	0	0.00
Total	38,195,911,101.60	100	1,395,079,037	100	43,870,628,737.98	100	1,625,997,033	100

HS Code (6)	2024				2025			
	FOB Value (USD)	%	Net Weight (Kg.)	%	FOB Value (USD)	%	Net Weight (Kg.)	%
870323 - passenger motor vehicles with spark-ignition internal combustion reciprocating piston engine, cylinder capacity over 1,500 cc but not over 3,000 cc	20,959,321,072.46	49.61	853,879,964	55.42	8,027,505,320.75	43.05	377,644,205	51.56
870340 - passenger motor vehicles, with both spark-ig intrnl combust and electric motor, other than those charges by plugging to external electric power	3,693,627,894.64	8.75	159,158,673	10.33	2,004,909,894.18	10.76	80,962,140	11.06
870324 - passenger motor vehicles with spark-ignition internal combustion reciprocating piston engine, cylinder capacity over 3,000 cc	6,784,261,497.62	16.06	113,644,859	7.38	2,930,676,055.60	15.72	53,904,837	7.36
870380 - motor vehicles with only electric motor,others	6,459,992,666.46	15.29	264,574,522	17.17	3,001,610,680.33	16.10	129,072,032	17.63
870360 - motor vehicles with both spark-ig and electric motor, capable of charge by plugging to extnl pwr	4,052,124,671.21	9.60	137,115,431	8.90	2,469,763,318.02	13.25	81,593,731	11.14
870322 - passenger motor vehicles with spark-ignition internal combustion reciprocating piston engine, cylinder capacity over 1,000 cc but not over 1,500 cc	14,036,757.44	0.04	858,690	0.06	3,248,946.03	0.02	217,721	0.03
870333 - passenger motor vehicles with compression-ignition internal combustion piston engine (diesel), cylinder capacity over 2,500 cc	37,391,957.41	0.09	492,733	0.04	21,665,922.19	0.12	306,602	0.05
870350 - motor vehicles, with both compres-ig internal combust piston engine (diesel/semi-diesel) and electric motor,not charged by plug	39,231,770.89	0.10	1,478,721	0.10	121,394,873.30	0.66	5,390,521	0.74



HS Code (6)	2024				2025			
	FOB Value (USD)	%	Net Weight (Kg.)	%	FOB Value (USD)	%	Net Weight (Kg.)	%
870332 - passenger motor vehicles with compression-ignition internal combustion piston engine (diesel), cylinder capacity over 1,500 cc but not over 2,500 cc	184,574,068.05	0.44	8,982,141	0.59	58,916,703.22	0.32	3,012,324	0.42
870321 - passenger motor vehicles with spark-ignition internal combustion reciprocating piston engine, cylinder capacity not over 1,000 cc	12,835,690.30	0.04	589,962	0.04	7,264,620.77	0.04	299,136	0.05
870390 - passenger motor vehicles, others	10,759,294.62	0.03	72,835	0.01	339,963.58	0.01	9,179	0.01
870310 - passenger motor vehicles specially designed for traveling on snow; golf carts and similar vehicles	3,465,772.59	0.01	96,133	0.01	1,090,627.57	0.01	18,414	0.01
870331 - passenger motor vehicles with compression-ignition internal combustion piston engine (diesel), cylinder capacity not over 1,500 cc	1,560,724.45	0.01	72,080	0.01	95,334.37	0.01	14,404	0.01
870370 - motor vehicles, with both compression-ignition internal combustion (diesel/semi-diesel and electric motor, capable of charged by plugging	0.00	0.00	0	0.00	0.00	0.00	0	0.00
Total	42,253,183,838.09	100	1,541,016,744	100	18,648,482,259.85	100	732,445,246	100

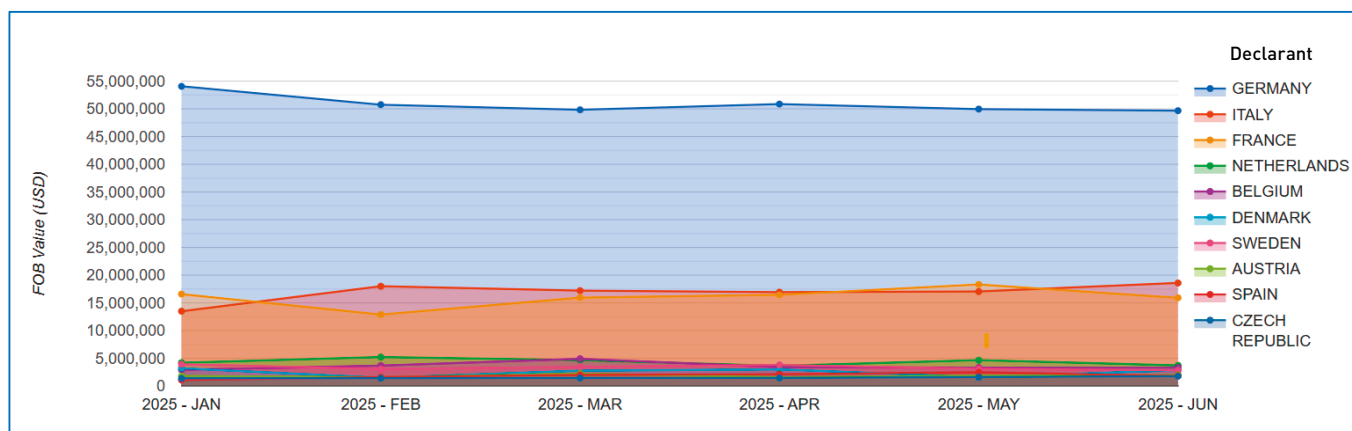
Fastener exports from the EU to the U.S. also held steady through the first six months of 2025, totaling US\$636 million. Germany once again led the pack, supplying 48% of that volume, followed by France and Italy, each contributing 15%. The remaining EU member states accounted for smaller shares ranging between 1% and 4%. While month-to-month fastener exports remained largely stable, February marked a minor dip to US\$103 million, down from US\$106 million in January, before rebounding to US\$107 million in March. This steadiness contrasts with the volatility in automobile exports and underscores the strategic importance of fasteners as a more stable, albeit less headline-grabbing, component of the transatlantic trade equation.

EU Exports of 7318 to the US (Month over Month Trend, 2025)

Declarant	2025 - JAN				2025 - FEB				2025 - MAR			
	FOB Value (USD)	%	Net Weight (Kg.)	%	FOB Value (USD)	%	Net Weight (Kg.)	%	FOB Value (USD)	%	Net Weight (Kg.)	%
Germany	54,060,034.41	50.89	4,089,959	59.87	50,762,000.35	49.13	3,978,040	59.92	49,828,565.21	46.27	4,181,154	58.07
France	16,582,341.72	15.61	79,226	1.16	12,889,476.59	12.48	52,849	0.80	15,955,609.99	14.82	86,373	1.20
Italy	13,495,400.05	12.71	1,332,288	19.50	17,995,548.06	17.42	1,346,849	20.29	17,201,655.34	15.98	1,617,504	22.47
Netherlands	4,201,799.83	3.96	133,510	1.96	5,211,264.17	5.05	174,979	2.64	4,683,564.95	4.35	143,011	1.99
Sweden	3,923,615.39	3.70	235,320	3.45	3,079,182.45	2.99	171,033	2.58	3,435,096.29	3.19	181,893	2.53
Denmark	3,217,715.86	3.03	266,240	3.90	1,487,525.74	1.44	124,658	1.88	2,756,255.01	2.56	217,566	3.03
Belgium	2,923,939.24	2.76	190,551	2.79	3,664,383.01	3.55	219,695	3.31	4,910,581.71	4.56	158,698	2.21
Austria	1,796,415.68	1.70	105,941	1.56	1,588,030.54	1.54	71,115	1.08	2,260,426.55	2.10	121,850	1.70
Czech	1,365,413.77	1.29	121,444	1.78	1,421,950.45	1.38	82,563	1.25	1,450,452.25	1.35	92,327	1.29
Poland	1,162,915.86	1.10	90,507	1.33	1,203,512.77	1.17	94,855	1.43	980,480.26	0.92	91,622	1.28
Spain	1,075,403.48	1.02	98,187	1.44	1,607,044.56	1.56	195,820	2.95	1,998,127.76	1.86	160,465	2.23
Ireland	592,924.52	0.56	7,390	0.11	824,807.36	0.80	13,418	0.21	711,132.80	0.67	14,175	0.20
Bulgaria	530,801.28	0.50	20,321	0.30	440,872.90	0.43	15,252	0.23	365,530.36	0.34	13,382	0.19
Hungary	503,042.00	0.48	5,071	0.08	407,642.54	0.40	12,061	0.19	548,622.30	0.51	17,377	0.25
Finland	153,218.73	0.15	4,204	0.07	192,615.96	0.19	3,804	0.06	138,141.25	0.13	3,899	0.06
Croatia	150,122.77	0.15	11,266	0.17	140,662.12	0.14	43,613	0.66	205,810.81	0.20	66,497	0.93
Portugal	110,895.82	0.11	19,577	0.29	65,390.50	0.07	7,175	0.11	20,914.33	0.02	16,746	0.24
Slovakia	102,758.94	0.10	10,378	0.16	189,652.14	0.19	22,846	0.35	117,321.37	0.11	12,213	0.17
Slovenia	96,075.34	0.10	6,504	0.10	44,025.12	0.05	1,999	0.04	12,192.42	0.02	562	0.01
Lithuania	88,156.88	0.09	1,789	0.03	16,914.49	0.02	402	0.01	21,041.99	0.02	1,167	0.02
Estonia	43,333.17	0.05	1,290	0.02	4,959.73	0.01	171	0.01	45,929.12	0.05	1,074	0.02
Romania	42,994.72	0.05	870	0.02	46,739.05	0.05	565	0.01	43,296.12	0.05	1,086	0.02
Luxembourg	16,453.86	0.02	132	0.01	8,022.00	0.01	113	0.01	1,059.63	0.01	39	0.01
Greece	9,167.83	0.01	413	0.01	25,578.99	0.03	952	0.02	3,888.75	0.01	73	0.01
Latvia	2,878.60	0.01	10	0.01	8,781.61	0.01	235	0.01	714.03	0.01	5	0.01
Cyprus	90.06	0.01	1	0.01	0.00	0.00	0	0.00	0.00	0.00	0	0.00
Malta	14.50	0.01	1	0.01	1,165.84	0.01	4,769	0.08	918.48	0.01	541	0.01
Total	106,247,924.18	100	6,832,390	100	103,327,748.90	100	6,639,831	100	107,697,328.95	100	7,201,299	100



Declarant	2025 - APR				2025 - MAY				2025 - JUN			
	FOB Value (USD)	%	Net Weight (Kg.)	%	FOB Value (USD)	%	Net Weight (Kg.)	%	FOB Value (USD)	%	Net Weight (Kg.)	%
Germany	50,866,099.75	47.84	4,209,156	59.54	49,955,029.70	46.50	4,024,017	47.01	49,673,304.49	47.01	4,333,055	58.01
France	16,453,966.56	15.48	74,426	1.06	18,319,381.71	17.05	71,254	15.07	15,918,613.65	15.07	69,215	0.93
Italy	16,927,328.30	15.92	1,373,149	19.43	17,038,364.44	15.86	1,558,512	17.59	18,583,344.22	17.59	1,598,732	21.41
Netherlands	3,650,856.60	3.44	142,428	2.02	4,656,660.72	4.34	184,391	3.52	3,718,735.35	3.52	119,541	1.61
Sweden	3,799,422.28	3.58	167,059	2.37	3,121,495.66	2.91	177,425	2.68	2,821,586.98	2.68	94,337	1.27
Denmark	3,002,591.55	2.83	253,785	3.59	1,630,148.30	1.52	183,955	2.69	2,839,432.98	2.69	335,623	4.50
Belgium	3,397,913.74	3.20	204,631	2.90	3,307,687.01	3.08	167,828	3.14	3,312,131.67	3.14	179,643	2.41
Austria	1,564,299.10	1.48	88,474	1.26	1,888,409.57	1.76	100,908	1.89	1,989,622.07	1.89	129,361	1.74
Czech	1,456,480.56	1.37	148,590	2.11	1,603,454.77	1.50	126,160	1.69	1,783,654.21	1.69	136,585	1.83
Poland	914,456.19	0.86	69,111	0.98	984,818.72	0.92	68,127	0.92	963,200.91	0.92	84,451	1.14
Spain	2,141,001.35	2.02	173,172	2.45	2,470,842.33	2.30	762,877	1.73	1,825,903.63	1.73	232,926	3.12
Ireland	572,493.00	0.54	15,356	0.22	1,210,483.10	1.13	34,147	0.74	778,347.46	0.74	11,597	0.16
Bulgaria	383,209.09	0.37	12,735	0.19	333,979.64	0.32	11,637	0.38	397,626.94	0.38	18,769	0.26
Hungary	477,137.57	0.45	9,945	0.15	378,442.16	0.36	8,509	0.40	416,568.68	0.40	5,722	0.08
Finland	172,792.12	0.17	3,279	0.05	105,271.49	0.10	2,429	0.12	126,425.54	0.12	2,340	0.04
Croatia	280,227.42	0.27	102,495	1.45	24,447.83	0.03	123	0.17	175,211.26	0.17	94,691	1.27
Portugal	15,333.87	0.02	390	0.01	126,522.56	0.12	95,437	0.06	57,739.97	0.06	3,992	0.06
Slovakia	99,750.02	0.10	15,658	0.23	122,870.58	0.12	13,604	0.13	128,785.86	0.13	13,753	0.19
Slovenia	12,365.36	0.02	173	0.01	68,697.46	0.07	3,087	0.06	54,396.46	0.06	2,532	0.04
Lithuania	31,237.89	0.03	1,121	0.02	20,670.46	0.02	1,011	0.03	22,697.27	0.03	865	0.02
Estonia	32,116.89	0.04	1,086	0.02	16,028.96	0.02	404	0.05	51,571.80	0.05	1,359	0.02
Romania	51,277.83	0.05	1,361	0.02	42,344.11	0.04	774	0.02	13,094.84	0.02	219	0.01
Luxembourg	26,068.65	0.03	156	0.01	16,152.08	0.02	21	0.02	13,161.74	0.02	129	0.01
Greece	1,781.76	0.01	10	0.01	485.73	0.01	1	0.01	794.73	0.01	2	0.01
Latvia	10,730.47	0.02	76	0.01	6,546.01	0.01	120	0.01	4,562.85	0.01	106	0.01
Cyprus	0.00	0.00	0	0.00	0.00	0.00	0	0.00	0.00	0.00	0	0.00
Malta	2,750.38	0.01	2,520	0.04	355.83	0.01	5	0.00	0.00	0.00	0	0.00
Total	106,343,688.16	100	7,070,342	100	107,449,590.81	100	7,596,763	100	105,670,515.43	100	7,469,545	100

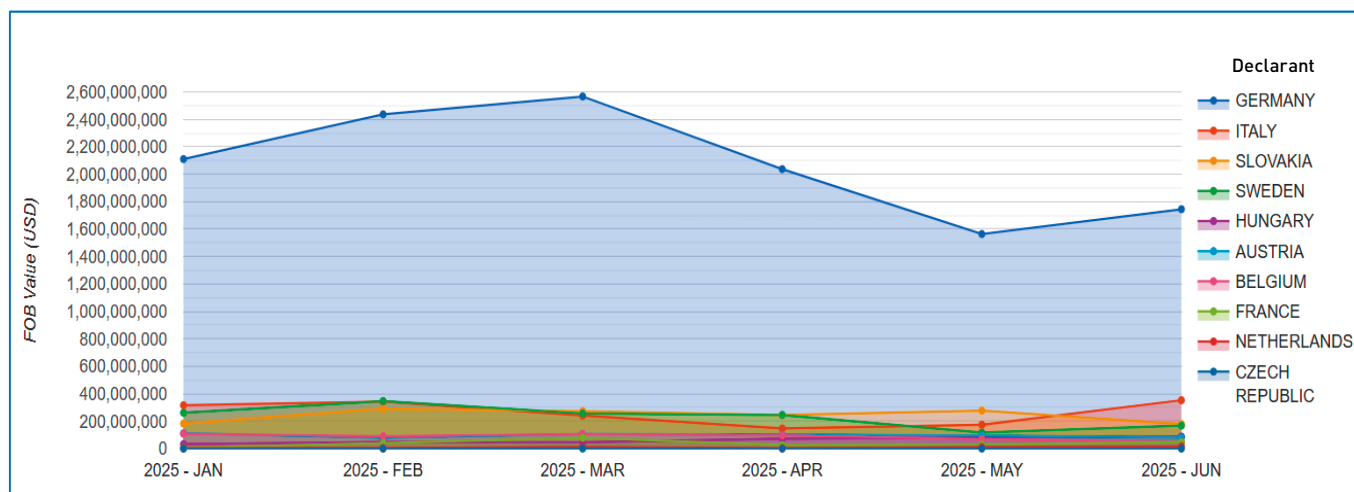


EU Exports of 8703 to the US (Month over Month Trend, 2025)

Declarant	2025 - JAN				2025 - FEB				2025 - MAR			
	FOB Value (USD)	%	Net Weight (Kg.)	%	FOB Value (USD)	%	Net Weight (Kg.)	%	FOB Value (USD)	%	Net Weight (Kg.)	%
Germany	2,110,028,445.42	67.27	80510113	65.61	2,436,191,063.58	66.13	89,187,600	63.34	2,566,588,003.74	69.48	94,533,527	66.77
Italy	316,577,087.58	10.10	2,937,450	2.40	343,044,472.80	9.32	3,170,733	2.26	241,252,138.45	6.54	2,593,801	1.84
Slovakia	182,893,911.17	5.84	8,718,291	7.11	291,284,594.79	7.91	14,116,862	10.03	272,485,113.39	7.38	13,754,505	9.72
Sweden	261,898,066.76	8.35	15,873,283	12.94	346,198,521.91	9.40	20,435,407	14.52	256,358,455.54	6.94	14,389,916	10.17
Hungary	33,060,550.42	1.06	2,597,455	2.12	48,431,756.33	1.32	3,689,454	2.63	47,219,646.89	1.28	3,718,520	2.63

Declarant	2025 - JAN				2025 - FEB				2025 - MAR			
	FOB Value (USD)	%	Net Weight (Kg.)	%	FOB Value (USD)	%	Net Weight (Kg.)	%	FOB Value (USD)	%	Net Weight (Kg.)	%
Austria	112,128,836.06	3.58	4,543,233	3.71	79,417,226.62	2.16	3,247,394	2.31	106,357,292.31	2.88	4,381,745	3.10
Belgium	109,186,445.24	3.49	7,050,963	5.75	90,505,747.32	2.46	5,735,183	4.08	107,257,006.91	2.91	6,563,623	4.64
France	6,273,900.32	0.21	263,099	0.22	41,226,667.72	1.12	1,050,018	0.75	78,723,207.93	2.14	1,379,254	0.98
Netherlands	2,597,089.74	0.09	141,280	0.12	5,360,544.15	0.15	114,769	0.09	12,669,535.58	0.35	140,219	0.10
Czech	189,041.71	0.01	674	0.01	70,868.56	0.01	2,268	0.01	965,901.82	0.03	12,457	0.01
Spain	1,046,885.61	0.04	58,339	0.05	553,163.21	0.02	29,570	0.03	1,155,103.53	0.04	75,955	0.06
Poland	308,698.39	0.01	22,273	0.02	370,993.59	0.02	15,449	0.02	406,269.31	0.02	22,233	0.02
Finland	0.00	0.00	0	0.00	4,663.35	0.01	700	0.01	131,682.84	0.01	4,663	0.01
Portugal	0.00	0.00	0	0.00	41,754.58	0.01	1,540	0.01	0.00	0.00	0	0.00
Bulgaria	0.00	0.00	0	0.00	34,732.31	0.01	1,915	0.01	0.00	0.00	0	0.00
Lithuania	0.00	0.00	0	0.00	0.00	0.00	0	0.00	27,710.04	0.01	3,638	0.01
Romania	33,955.33	0.01	1,650	0.01	19,826.29	0.01	3,343	0.01	747,296.84	0.03	1,250	0.01
Ireland	0.00	0.00	0	0.00	155,444.93	0.01	1,668	0.01	0.00	0.00	0	0.00
Total	3,136,781,555.18	100	122,724,018	100	3,683,946,117.79	100	140,810,729	100	3,694,476,082.36	100	141,586,223	100

Declarant	2025 - APR				2025 - MAY				2025 - JUN			
	FOB Value (USD)	%	Net Weight (Kg.)	%	FOB Value (USD)	%	Net Weight (Kg.)	%	FOB Value (USD)	%	Net Weight (Kg.)	%
Germany	2,036,990,092.39	68.36	78,362,087	62.98	1,564,225,946.13	64.58	57,627,036	60.36	1,744,982,237.97	63.90	71,451,725	66.53
Italy	147,006,210.22	4.94	838,679	0.68	174,239,992.64	7.20	1,503,849	1.58	353,116,223.58	12.93	2,486,799	2.32
Slovakia	244,634,091.93	8.21	12,637,797	10.16	277,445,094.34	11.46	14,056,043	14.73	178,985,939.10	6.56	9,046,843	8.43
Sweden	245,809,515.65	8.25	15,112,743	12.15	117,525,184.94	4.86	6,779,459	7.11	168,201,298.02	6.16	9,209,471	8.58
Hungary	72,662,824.77	2.44	5,620,431	4.52	81,217,352.29	3.36	5,851,062	6.13	87,501,505.57	3.21	6,548,574	6.10
Austria	101,967,834.53	3.43	3,999,694	3.22	94,337,730.85	3.90	3,552,723	3.73	82,441,260.39	3.02	3,096,552	2.89
Belgium	97,109,387.68	3.26	6,092,513	4.90	69,677,961.49	2.88	4,136,808	4.34	48,503,886.76	1.78	2,602,336	2.43
France	26,916,299.79	0.91	1,587,745	1.28	29,709,497.53	1.23	1,750,755	1.84	48,038,734.76	1.76	2,804,740	2.62
Netherlands	4,044,045.98	0.14	65,278	0.06	11,910,534.95	0.50	151,238	0.16	17,208,852.98	0.64	80,564	0.08
Czech	219,214.79	0.01	9,205	0.01	619,542.39	0.03	8,361	0.01	558,138.10	0.03	6,087	0.01
Spain	1,586,491.09	0.06	73,279	0.06	815,999.14	0.04	41,148	0.05	459,637.77	0.02	32,381	0.04
Poland	231,530.90	0.01	15,705	0.02	250,953.44	0.02	15,097	0.02	358,712.96	0.02	18,193	0.02
Finland	0.00	0.00	0	0.00	12,143.15	0.01	1,260	0.01	349,412.08	0.02	1,200	0.01
Portugal	0.00	0.00	0	0.00	206,715.90	0.01	1,380	0.01	148,141.89	0.01	4,475	0.01
Bulgaria	173,028.79	0.01	5,041	0.01	0.00	0.00	0	0.00	123,323.40	0.01	3,955	0.01
Lithuania	257,891.81	0.01	7,467	0.01	0.00	0.00	0	0.00	48,916.29	0.01	6,223	0.01
Romania	219,401.77	0.01	5,796	0.01	19,563.78	0.01	3,103	0.01	930.46	0.01	2,140	0.01
Ireland	0.00	0.00	0	0.00	0.00	0.00	0	0.00	131.70	0.01	6	0.01
Total	2,980,037,007.94	100	124,442,690	100	2,422,214,212.90	100	95,479,322	100	2,731,027,283.70	100	107,402,264	100



How Tariffs Threaten to Undermine the U.S. Auto Supply Chain

The U.S. automobile industry is facing an acute supply chain risk because of the 50% tariff imposed on steel fasteners imported from the European Union. These seemingly small components are vital to the structure and safety of every vehicle, playing an essential role in assembling engines, suspensions, electronics, and battery systems, especially in electric vehicles. Historically, many of these high-grade, precision-engineered fasteners have come from European suppliers, particularly in Germany and Italy, where manufacturers like Würth, Böllhoff, and Fontana have dominated the supply chain.

With no exemptions or relief mechanisms currently in place under the broader U.S.-EU trade framework, these fasteners now fall under the same elevated tariff burden applied to broader steel and aluminum categories. The result is a steep increase in production costs and potential delays as U.S. automakers and parts suppliers scramble to requalify new sources of supply. The just-in-time nature of automotive manufacturing leaves little room for error, and many of the fasteners subject to the tariffs must meet rigorous quality and safety standards, limiting the speed at which suppliers can pivot.

In response, companies are beginning to reconfigure their sourcing strategies. **Mexico, which benefits from tariff-free access under the USMCA, is rapidly emerging as a preferred alternative,** with some EU-based fastener producers already operating satellite facilities there.

Domestic U.S. producers stand to gain, but the ramp-up in certified production capacity is likely to take years, not months. While there is growing pressure from industry groups like the Industrial Fasteners Institute to include fasteners in any future tariff-rate quota system or exemption framework, no changes have been confirmed. Until then, fasteners remain a hidden but critical pressure point in an industry already contending with inflation, supply chain volatility, and the transition to electric mobility.

Unless meaningful adjustments are made either through new trade carve-outs or accelerated investment in North American manufacturing, automakers may find themselves caught between rising costs and tighter margins, with

downstream effects rippling through vehicle pricing, competitiveness, and production stability well into 2026. ■

Taiwan being home to the world's largest fastener export industry is also seeing increased demand. South Korean firms, particularly those tied to the Hyundai-Kia supply network, offer another viable option for advanced parts.

Copyright owned by Fastener World / Article by Sabrina Rodriguez

SHENG CHING ENTERPRISE CO., LTD.

Professional OEM & ODM Metal Manufacturer



Sheng Ching is the most reliable OEM and ODM manufacturer of stamping parts.



SHENG CHING ENTERPRISE CO., LTD.

No. 10, Ln. 3, Sec. 2, Yuanlu Rd., Puyen Township, Changhua, Taiwan 516019

D-U-N-S® Num: 65-767-1314

TEL: +886-4-8659780

FAX: +886-4-8655738

E-MAIL: sc1986@shengching.com.tw

<http://www.shengching.com>



WEBSITE