EU Construction Screws and Hardware Market in 2025

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The EU construction screws and hardware market in 2025 was shaped by uneven construction activity, selective demand, and a more cautious buying environment across much of Europe. It was not a year of broad-based expansion. Instead, it was a year in which segment exposure mattered. Residential construction remained under pressure, while civil engineering and specialised construction activities provided relatively firmer support. For manufacturers, importers, distributors, and stockists of screws, anchors, threaded rods, bolts, washers, brackets, and related fixing products, 2025 was defined more by product mix, supply discipline, and application focus than by simple volume growth.

Market Overview /////

By the end of 2025, the overall EU construction picture remained subdued but not collapsing. According to Eurostat, EU construction output in December 2025 was stable compared with December 2024. On a full-year basis, the annual average production in construction increased by just 0.5% in the EU, while the euro area remained flat. That alone shows the character of the year. Construction did not deliver the kind of broad momentum that would lift all categories of screws and hardware equally.

What mattered more was the divergence between sub-sectors. Building construction weakened, while infrastructure-oriented and specialist work performed better. That distinction is critical for the fastener and hardware trade because different construction segments pull different categories of product, with residential building typically supporting large-volume consumption of standard screws and merchant hardware, while infrastructure and specialist applications generate demand for more technical, heavier-duty, or project-specific fastening systems.

A Flat Market with Uneven Segment Performance /////

Two indicators best explain the market backdrop for screws and hardware in 2025. First, overall EU construction activity remained broadly flat. Second, performance differed by segment, with building construction weaker than civil engineering and specialised construction activities.

Table 1. EU construction market snapshot in 2025

Measure	Result
EU construction output, annual average change in 2025	+0.5%
Euro area construction output, annual average change in 2025	0.0%
EU construction output, December 2025 vs December 2024	0.0%

Table 2. EU construction performance by segment, year-on-year change in December 2025

Segment	YoY Change
Construction of buildings	-0.7%
Civil engineering	+0.9%
Specialized construction activities	+1.1%

Construction of buildings

Civil engineering
+
Specialized construction activities

This divergence helps explain why 2025 was weaker for some product lines and more stable for others. Suppliers with heavy exposure to housing starts, light residential works, and standard builder-merchant turnover faced a more difficult environment. By contrast, suppliers serving civil engineering, technical installations, industrial projects, façades, support structures, and repair-related works operated in relatively firmer segments.

Residential Construction Remained the Main Constraint /////

The strongest headwind in 2025 continued to come from housebuilding. FIEC reported that **EU construction investment had already declined by 2.0% in 2024, driven mainly by a 7.7% drop in housebuilding.** For 2025, FIEC projected a further 3.9% decline in housebuilding. This is highly relevant to the screws and hardware business because residential construction is one of the most important end-use channels for high-turnover fastening products across merchants, distributors, and DIY-linked professional supply chains.

At the same time, civil engineering remained the main growth driver. **FIEC reported that civil engineering had grown by 5.9% in 2024 and was expected to rise by a further 5.4% in 2025. That pattern supports demand in product categories linked to anchoring, structural fixing, threaded assemblies, concrete fixing, heavy supports, and technically specified hardware.**

Civil Engineering Provided the Stronger Base /////

While residential construction remained under pressure, civil engineering provided a more stable base for the European screws and hardware market in 2025. This contrast is important because it helps explain why demand held up better in some fastening categories than in others.

Table 3. Key construction trends shaping the EU screws and hardware market

Indicator	2024	2025 Position
Construction investment	-2.0%	Recovery remained mixed
Housebuilding	-7.7%	-3.9% forecast
Civil engineering	+5.9%	+5.4% forecast
Total construction output, annual average	—	+0.5%

This pattern is one of the clearest explanations for the 2025 screws and hardware market. The year did not create a uniform demand profile. Instead, it shifted demand away from a simple residential volume story and toward a more segmented, project-driven market. For suppliers serving infrastructure, concrete fixing, support systems, anchoring applications, and technically specified installation work, conditions were relatively firmer than in residential-led channels.

Interest Rates Eased, but Recovery Was Limited /////

Monetary conditions became less restrictive during 2025, but the improvement was gradual rather than transformative. The ECB reduced its key rates during the year, with the deposit facility rate moving down to 2.00% by June 2025. However, borrowing costs for housing remained elevated enough to keep a lid on any sharp rebound in residential construction. In December 2025, the ECB reported that the interest rate on new housing loans with a floating rate or short initial fixation remained at 3.55%, while the rate for loans fixed for over one and up to five years stood at 3.37%.

This matters for the construction fastener and hardware sector because the residential pipeline typically responds to financing with a lag. Lower rates helped stabilise conditions, but they did not immediately restore the kind of confidence needed for a strong surge in private residential building across the EU. As a result, 2025 was more a year of bottoming out and selective stabilisation than a true rebound year for screws and hardware tied to new housing.

Import Dependence and Trade Pressure Stayed Important /////

Another important factor in 2025 was Europe's continued dependence on imported iron and steel articles. Eurostat reported that in 2024 the EU imported €73.1 billion worth of iron and steel and related articles. Within that, imports of articles of iron and steel reached €33.6 billion, with China accounting for €12.5 billion, or 37.3% of that category. This does not represent construction screws and hardware alone, but it is still highly relevant because the broader downstream metal-products trade gives a strong indication of Europe's exposure to external supply in industrial and construction-related components.

That dependence remained commercially important in 2025, especially for more price-driven, standardised, or commodity-like product groups. Margin pressure, lead-time decisions, and sourcing flexibility all remained tied to the balance between Asian supply, European stockholding strategies, and local project demand.

Anti-Dumping Action Reshaped Part of the Market /////

Trade policy became more visible in the screws market during 2025. **In October 2025, the European Commission imposed definitive anti-dumping duties on imports of screws without heads from China, with duties ranging from 54.7% to 72.3%.** The Commission stated that the EU market for this product group is worth around €500 million. **The scope includes threaded rods, anchor bolts, and U-bolts, which are directly relevant to construction and installation work.**

This is one of the most concrete 2025 developments for the sector itself. It suggests that certain product niches within the European fastener market had reached a point where unfairly traded imports were seen as materially distorting competition. For importers, traders, and buyers, the message was clear: some formerly price-led categories were entering a more regulated and less predictable trading environment.

Regulation and Compliance Moved Higher on the Agenda /////

The regulatory backdrop also shifted in 2025. The new Construction Products Regulation entered into force on 7 January 2025, replacing the older 2011 framework. For screws and hardware suppliers, the full practical impact will play out over time rather than instantly, but the direction is clear. Product information, performance communication, and regulatory alignment will become increasingly important in how construction products are marketed and specified across the EU.

This matters because the screws and hardware market is no longer driven only by price and availability. In many applications, especially in commercial, infrastructure, and technically controlled environments, **buyers increasingly expect traceability, declared performance, and specification-ready documentation.** That trend benefits established manufacturers and disciplined distributors more than opportunistic commodity trading models.

Labour Shortages Continued to Influence Demand /////

The market was also affected by conditions on the construction site itself. The European Commission stated in late 2025 that between 25% and 30% of construction firms reported **labour shortages as a factor limiting output.** This is more than a workforce issue. It directly affects the hardware and fastening trade because labour-constrained contractors tend to value ease of installation, consistent quality, and reduced rework risk more than before.

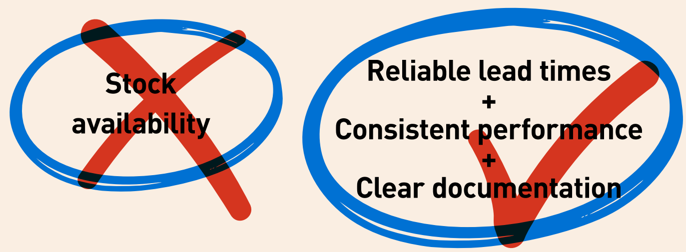
In that environment, technically supported anchoring systems, structural screws, coated or corrosion-resistant products, and application-focused fixing solutions can gain importance even in a flat overall market. When contractors are under pressure to deliver with tighter labour capacity, product performance and installation efficiency matter more.

Industry Insight and Market Perspective /////

From my perspective, 2025 should not be read as a weak year for the entire EU screws and hardware market. It was a selective year. Companies positioned too heavily around standard residential volume, low-margin bulk supply, and undifferentiated price competition faced a difficult environment. Meanwhile, suppliers with stronger exposure to civil engineering, technical construction, industrial support systems, façades, repair and retrofit, and infrastructure-related applications were in a more defensible position.

That is why the market looked so uneven depending on where a company sat in the value chain. The headline construction number for the EU was close to flat, but the fastener and hardware business does not sell into one single construction market. It sells into multiple demand environments at once. In 2025, those environments moved differently.

A second lesson from 2025 is that the market rewarded specification more than speculation. In earlier, more volatile years, stock availability alone could drive commercial advantage. **In 2025, buyers were more selective. They wanted reliable lead times, consistent performance, clear documentation, and application suitability.** In practical terms, that supports suppliers who can offer not just product, but also confidence.



A third point is that 2025 may prove to be an important transition year. Residential construction was still weak, but financing conditions were improving. Civil engineering remained firm. Regulatory pressure increased. Trade protection became more visible in certain screw categories. All of that points to a market becoming more differentiated, more compliance-sensitive, and more application-specific.

Conclusion /////

The EU construction screws and hardware market in 2025 was not defined by a simple up-or-down story. It was defined by divergence. Residential construction remained the weakest link, limiting demand for many standard high-volume fixing products. Civil engineering and specialised works helped support more technical categories. Interest rates moved in a better direction, but not enough to revive housing decisively. Import dependence remained significant, while anti-dumping action showed that trade conditions were tightening in some niches. At the same time, labour shortages and regulatory change pushed the market further toward performance, reliability, and technical value.

For the industry, 2025 should be understood as a year of repositioning rather than a year of broad expansion. The companies that performed best were not necessarily those chasing the lowest price or the highest stock turnover. They were the ones aligned with the right end-use segments, the right applications, and the right market signals. ■

Sources:

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Eurostat. EU exported €77.8 billion worth of iron and steel in 2024.