



2025 年英國家居裝潢和緊固工具市場需求

UK Home Improvements and Fastening Tool Market Demand in 2025

UK Home Improvement Market 2025: Scale and Structure

The UK home improvement and fastening tool market in 2025 is shaped by a complex mix of economic pressure, changing housing dynamics, and evolving consumer behaviour. Rather than a simple post-pandemic surge or decline, the market is undergoing structural rebalancing: large-scale renovations are slowing, while smaller, value-driven, and efficiency-focused improvements are increasing.

The UK home improvement market is subject to varying estimates depending on scope and definition. Broader assessments of the sector place the market at approximately £29.8 billion in 2024, rising modestly to around £30.8 billion by 2030, reflecting a mature industry with steady long-term growth of roughly 3–4%. These figures typically encompass a wide range of activity, including DIY retail, building materials, renovation spending, and professional home improvement services.

Narrower market analyses that focus on selected segments—often excluding parts of DIY retail or limiting coverage to specific product and service categories—estimate the market at around USD 15 billion in 2025, with projections reaching USD 21.8 billion by 2034, implying a compound annual growth rate of approximately 4.3%. This growth is driven by three main structural forces:

1. Aging Housing Stock

A significant proportion of UK housing stock is aged, with around 22% built before 1919 and roughly one-third constructed before 1945, meaning **a large share of homes are over 50 years old.**¹ Much of the remaining stock was built during the post-war period, particularly between 1945 and 1970, reinforcing the dominance of ageing properties across the market.² **This structural profile drives continuous demand for maintenance and upgrades,** including electrical rewiring, plumbing repairs, structural upkeep, and energy efficiency retrofits, as older homes typically fall below modern building and energy performance standards.



2. Energy Efficiency Regulations³

The UK housing stock is under significant regulatory pressure to improve energy efficiency, driven by the government's net-zero targets and EPC (Energy Performance Certificate) framework. As of recent estimates, over 56% of UK homes are rated EPC band D or lower, meaning the majority of properties fall below what is considered a “good” energy performance level. In contrast, only a small fraction of homes achieves top efficiency, with around 0.4% of properties rated EPC A, highlighting the scale of required upgrades across the housing stock. EPC ratings are based on energy performance factors such as insulation, heating systems, and building fabric, and range from A (most efficient) to G (least efficient).⁴ This regulatory gap is driving large-scale retrofit demand, as millions of homes require improvements to meet expected future standards—particularly the anticipated requirement for higher EPC ratings (commonly discussed as EPC C targets) through insulation upgrades, window replacement, heating system modernization, and smart energy controls.

1. https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/6748/2173483.pdf

2. https://www.housinglin.org.uk/_assets/Resources/Housing/OtherOrganisation/Modelling_the_current_and_potential_accessibility_of_the_housing_stock.pdf

3. <https://www.showhouse.co.uk/research-reveals-over-half-of-uk-homes-rated-epc-d-or-lower/news>

4. <https://www.ons.gov.uk/peoplepopulationandcommunity/housing/articles/energyefficiencyofhousinginenglandandwales/2024>

3. Shift from Moving to Improving

High mortgage rates and housing affordability issues have reduced mobility. As a result, homeowners increasingly choose to renovate rather than relocate.

Recent 2025 market activity confirms this shift, with DIY and home improvement retailers reporting strong growth despite economic uncertainty, **as consumers focus on incremental upgrades rather than large-scale construction.**

DIY Behavior in 2025: The Rise of “Small-Project Economics”

Consumer behavior in the UK DIY sector is changing significantly.

1. Decline in Large Projects, Rise in Micro-Renovations

According to industry research:

- » DIY spending fell in 2024 by around 2.4%
- » However, specialist DIY retail sales are expected to grow 1.8% in 2025

This reflects a shift toward:

- » Painting and decorating
- » Flooring upgrades
- » Furniture assembly
- » Minor repairs
- » Energy-saving installations



Rather than major renovations, consumers are increasingly focused on budget-conscious, high-impact improvements.

2. Tools and Equipment Dominate Spending

Tools and equipment account for approximately 63% of total DIY spending in the UK, making them the largest category within the home improvement ecosystem.

This is critical because it directly ties DIY growth to fastening tool demand.

Fastening Tools Market in 2025: The Core Growth Engine

Fastening tools are not just a subcategory of power tools—they are the backbone of modern construction and DIY activity.

Market Size and Growth

The UK power tools market is expected to generate:

- » \$853.4 million in 2025
- » Growing to \$2.01 billion by 2033
- » CAGR: 11.6%

Additionally, the cordless power tools segment alone is projected to exceed USD 1 billion by 2033, growing at over 10% CAGR.

Why Fastening Tools Are Growing Faster Than the Market

The growth of fastening tools is not accidental. It is driven by five structural shifts.

1. Cordless Revolution

The cordless tool segment has become the dominant force in the power tools market, driven by rapid improvements in lithium-ion battery technology and changing end-user behavior. Globally, cordless power tools now account for over 60% of total power tool sales, and their share continues to increase as battery performance improves and costs decline. In the professional segment, adoption is even higher in certain categories such as drills and impact drivers, where cordless penetration exceeds 70% in developed markets.

This shift is strongly supported by structural housing and usage trends. **The prevalence of small urban housing units across Europe, particularly apartments and compact homes, has increased demand for tools that require minimal storage space and no fixed power connection. In parallel, DIY consumer behavior continues to expand, with more than 50% of European homeowners engaging in at least one home improvement project annually, reinforcing demand for easy-to-use, ready-to-operate tools.**



2. Labour Cost Inflation

Rising labour costs and structural shortages in the UK construction workforce are reshaping homeowner behavior, especially in small-scale repair and maintenance. Skilled trades such as electricians and plumbers have experienced estimated wage increases of around 20–30% over the past decade, reflecting sustained demand and limited labour supply. At the same time, industry surveys indicate that approximately 40–45% of UK construction firms report difficulties in recruiting skilled workers, highlighting ongoing capacity constraints.

This pressure is driving a shift toward greater DIY activity. **While over 50% of UK homeowners still engage in DIY annually, the range of tasks has expanded beyond basic decoration to include minor plumbing, assembly, and simple electrical work, as households respond to higher contractor costs and longer waiting times for professional services.**

3. Smart Home Installation Growth

The expansion of the smart home sector is creating a sustained uplift in demand for installation-related tools and hardware, particularly in residential retrofit and upgrade projects. In the UK and broader European market, smart home penetration has reached around 30–35% of households, with continued growth driven by security systems, connected lighting, thermostats, and energy management devices. Market forecasts suggest **the smart home sector will grow at a compound annual growth rate (CAGR) of approximately 10–15% over the next decade**, indicating accelerating installation activity at the household level.

This adoption trend directly increases demand for physical installation components and tools, particularly mounting systems, fastening brackets, and electrical fixture accessories required for wall-mounted devices such as smart thermostats, cameras, sensors, and lighting controls. The installation intensity of smart devices is notably higher in retrofit environments, where over 70% of installations require drilling, anchoring, or surface mounting adjustments due to legacy building structures not designed for integrated digital systems.

4. Modular Furniture and Interiors

IKEA-style modular furniture has become a dominant format in the European home furnishings market, driven by affordability, flat-pack logistics, and rising urban housing density. IKEA alone reports annual sales of tens of billions of euros globally, with flat-pack and self-assembly products representing the majority of its core offering. This structural shift has significantly increased the frequency of consumer-level assembly tasks across households.

As a result, demand for basic installation and fastening tools has grown steadily, particularly in compact and easy-to-use formats. **A large share of European households—over 60% in some markets—now purchase self-assembly furniture annually, creating recurring demand for screwdrivers, compact cordless drills, and precision fastening systems.** The trend is further reinforced by the growth of urban apartments and smaller living spaces, where modular furniture is preferred due to transport efficiency and space optimization.

5. Sustainability and Repair Culture

A growing cultural shift toward repair and reuse—supported by sustainability awareness and cost considerations—is gradually increasing demand for household tools and maintenance equipment. **In Europe, over 70% of consumers now report preferring to repair items rather than replace them when feasible, reflecting a broader “repair economy” mindset supported by environmental and cost pressures.**

This shift is contributing to higher tool ownership rates across households, particularly in urban and mid-income segments. In several European markets, more than half of households now own at least one basic power tool, while ownership of multi-purpose cordless tools has increased as consumers seek flexibility across a wider range of small repair tasks. **This behavioral change is also driving greater usage of compact, multi-functional fastening systems, as users prioritize tools that support diverse repair applications rather than single-purpose equipment.**

Future Outlook (2025–2030)

The UK home improvement and fastening tool market will not experience explosive growth—but it will become more stable, professionalized, and technologically advanced.

Key Forecast Trends:

- » Moderate overall growth (~3–4% annually in home improvement)
- » Stronger growth in power tools (~11% CAGR)
- » Fastening tools remaining the dominant subsegment
- » Expansion of cordless and smart tool systems
- » Continued DIY professional convergence

Conclusion: A Market Defined by Necessity, Not Boom Cycles

The UK fastening tool and home improvement market in 2025 is not driven by speculative growth—it is driven by necessity.

- » Aging housing stock ensures continuous demand
- » Economic pressure shifts consumers toward DIY
- » Fastening tools remain essential across all project types
- » Cordless and smart tools redefine product expectations

The most important insight is this: The market is no longer about large renovation cycles—it is about continuous micro-improvements. And in that environment, fastening tools are not optional equipment—they are core infrastructure for every home improvement decision in the UK. ■

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