

French Home Improvements and Fastening Tool Market Demand in 2025

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2025年法國家居裝潢和緊固工具市場需求

Statistics, Market Data, and Industry References

The French home improvement market in 2025 is going through a selective contraction rather than a uniform decline. While the broader DIY sector remains under pressure, fastening-related categories—especially screws, anchors, cordless drivers, drill systems, insulation fixings, and mounting accessories—are proving structurally more resilient.

The core reason is simple: decorative projects can be postponed, but fastening-dependent work tied to repair, compliance, energy savings, and space optimization cannot.

The latest market data shows that France's total DIY and gardening market reached €32.5 billion in 2025, down 2.7% year over year, with €24.2 billion attributable to DIY alone.

This is not a healthy expansion market. But within this pressured environment, fastening tools are outperforming large-ticket discretionary tool categories because they remain essential to execution.

The 2025 French DIY Market: What the Numbers Really Say

The French DIY market's weakness is measurable.

Recent 2025 market tracking shows:

- DIY revenue: €24.2 billion
- Total DIY + gardening: €32.5 billion
- Overall market decline: -2.7%
- DIY-only decline: -3.2%
- DIY store channel share: 62%

A second 2025 market study (that is focused on rolling panel / tracked subset / sample channel study through July 2025) confirms the pressure, showing that on a 12-month rolling basis through July 2025:

- DIY revenue reached €1.4 billion
- Value declined 5.2%
- Volume declined 4.7%

This is the first strategic reality: **French consumers are spending less on broad DIY, but not evenly across all categories.**

The same study reveals that:

- Tool sales fell 16.7%
- DIY decoration fell 21.1%
- Lighting declined 6.4%

At first glance this may look negative for fastening tools. That would be the wrong conclusion. The decline is concentrated in general-purpose, postponable, and non-urgent tools, not in fastening systems linked to active projects.

Why Fastening Demand Is Stronger Than General Tool Demand

Fastening demand follows a fundamentally different purchase logic from discretionary tool categories.

In a weaker consumer environment, homeowners often postpone products that are linked to aspiration, convenience, or non-essential upgrades. Premium cutting tools, decorative systems, and workshop equipment are easy to delay because the project itself can be deferred.

Fastening-related demand behaves differently because it is tied not to aspiration, but to project completion.

The moment a household decides to execute even a small task—whether improving storage, reinforcing existing fixtures, repairing moisture damage, upgrading insulation, or adapting living space—the fastening component becomes unavoidable. The project may shrink in scope, but it still requires execution hardware. This creates a demand structure with far lower postponement elasticity than general tools.

The 2025 market data supports this distinction. While general tool sales declined sharply, the adjacent DIY accessories and materials segment still grew by 1.6%, indicating that consumable and installation-linked purchases remained active despite broader market caution.

This does not isolate fastening products as a standalone reported category, but it is a strong directional signal. Commercially, fastening demand sits closer to installation materials, repair consumables, and project-enabling accessories than to large one-time tool purchases.

Its resilience is strengthened by several economic advantages:

- lower average transaction value
- frequent replenishment cycles
- urgency driven by active repairs
- recurring demand from professional trades
- efficient digital reordering behavior
- direct linkage to energy retrofit and compliance work

The result is a segment that remains supported even when overall DIY budgets contract. So, the real 2025 story in France is not that consumers are buying more tools. It is that when any repair, retrofit, or optimization project moves forward, fastening demand is one of the last expenditures to be cut.

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Consumer Behavior Statistics: Smaller Projects, More Frequent Repairs

The most important 2025 consumer statistic is behavioral.

A January 2025 survey found that:

- 72% of French consumers changed their DIY spending habits
- 29% avoided new tool purchases
- 26% postponed projects
- 18% waited for promotions
- yet 58% still completed at least one home-improvement task every month

This reveals an important market reality: the French DIY market is losing basket value faster than it is losing project activity. In other words, households are still improving their homes, but they are doing so through smaller, more functional, and more phased interventions. Instead of full-room remodeling, consumers are increasingly:

- reducing project scope
- splitting upgrades into phases
- repairing instead of replacing
- optimizing storage and workspace
- improving safety and sealing
- adapting smaller living spaces

This shift is consistent with broader national project preferences. Home decor remains the most popular home-improvement activity in France among surveyed households, while functional interior upgrades continue to rank highly.

In parallel, 24% of households renovate specifically to reduce energy bills, and 60% actively consider eco-renovation projects, reinforcing the move toward smaller but execution-heavy upgrades such as mounted insulation, sealing systems, wall-mounted storage, and space-optimization fixtures.

Although no public 2025 dataset isolates each micro-task individually, these broader behavioral indicators strongly support the rise of fastening-intensive micro-renovation activity.



This is especially relevant in urban apartments, where smaller and more modular spaces often require more fixing points per square meter as households add vertical storage, foldable workspaces, safety fixtures, and sealing improvements.

As a result, even when total DIY spending declines, fastening unit demand can remain stable—or in certain subcategories, increase—because project execution continues at a high frequency.

Energy Renovation Is the Biggest Structural Growth Driver:

This is the strongest non-cyclical demand driver. French households are increasingly renovating to reduce energy bills.

Consumer data shows:

- 24% of French people renovate specifically to reduce energy bills
- 60% consider eco-renovation projects

That number is highly relevant for fastening tools because eco-renovation is mechanically fastening-heavy. As of 2025, approximately 3.9 million French homes are classified F or G energy rating, representing 12.7% of primary residences, and many are entering forced renovation cycles. This creates durable demand for fasteners and related tools.

Digital Commerce Is Reshaping Fastening Purchases

One of the most underappreciated 2025 statistics is online channel growth. In France:

- 5.3% of DIY sales are now online

That may sound small, but fastening categories are naturally over-indexed online in France. The winners in 2025 are not necessarily the brands with most shelf space, but the ones with the best digital discoverability architecture.

Rental, Reuse, and Tool Platform Economics

Another major behavioral shift is access over ownership. The 2025 French market shows:

- 60% of consumers are ready to rent tools in the next six months
- This is 7 percent in two years

This matters because it changes demand composition. Instead of premium one-time purchases, the market shifts toward consumable fastening accessories. So, it may cause tool ownership to weaken, while fastening attachment sales often stay healthy.

Professional Trades Are the Hidden Backbone of Demand

Retail DIY data alone materially understates the true fastening opportunity in France. A significant share of category resilience is supported by professional trades, where demand patterns are driven less by consumer sentiment and more by the non-deferrable nature of repair, compliance, and maintenance work.

Unlike discretionary retail purchases, professional fastening consumption is linked to operational necessity. Water leak interventions require immediate execution, electrical safety upgrades are compliance-driven, facade failures introduce legal and insurance liability, and insulation retrofits are increasingly shaped by regulatory pressure and energy-efficiency mandates. In addition, kitchen and bathroom replacement cycles continue irrespective of short-term consumer caution, sustaining recurring installation demand.

As a result, even in periods when households postpone aspirational or decorative projects, professional contractors continue to procure fastening systems and associated installation hardware at relatively stable rates. This includes high-torque driving platforms, collated installation systems, concrete anchoring solutions, metal framing kits, roofing fixings, corrosion-resistant exterior applications, and structural-grade connection systems.

This professional weighting helps explain why fastening-related demand typically declines less sharply than the broader retail tool segment, which recorded a 16.7% contraction in 2025. The underlying demand driver is shifting away from ownership-led DIY purchasing and toward execution-led professional consumption, where the economic priority is speed, reliability, compliance, and labor efficiency.

Conclusion

The French home improvement and fastening tool market in 2025 should not be understood as a growth cycle, but as a selective demand environment shaped by necessity, regulation, and execution behavior. While the broader DIY market remains under pressure, the underlying structure of demand is becoming more functional and less discretionary. Key market indicators highlight this shift clearly: the total French DIY and gardening market stands at approximately €32.5 billion, with the core DIY segment at €24.2 billion. At the same time, general tool categories are experiencing a decline of approximately 16.7%, while only a small portion of the market, such as online sales (5.3%), shows structural expansion. Consumer behavior further confirms this transition, with 72% of households reporting changes in DIY spending patterns, 60% indicating openness to tool rental, and 24% prioritizing energy-related renovations. In parallel, approximately 3.9 million French homes remain classified as energy inefficient, sustaining long-term retrofit demand. Taken together, these indicators point to a clear strategic conclusion. France is not exiting home improvement activity; it is rebalancing it. Discretionary and “nice-to-have” tool purchases are being delayed, while execution-critical categories tied to repair, safety, energy efficiency, and space optimization continue to move forward. In this environment, fastening systems occupy a structurally advantaged position. They are not dependent on project ambition, but on project completion. This makes the fastening category one of the most resilient and defensible segments within the French home improvement ecosystem in 2025, particularly in professional and energy-retrofit-driven applications. □

¹<https://www.diyinternational.com/content/news/2026/02/12/plus/diy-and-gardening-market-in-france-declines-by-2-7-per-cent.html>

²<https://www.diyinternational.com/content/news/2026/02/12/plus/diy-and-gardening-market-in-france-declines-by-2-7-per-cent.html>

³<https://www.intotheminds.com/blog/en/diy-market-study-france/>

⁴<https://www.statista.com/topics/6968/diy-and-home-improvement-market-in-france/>

U.S. New Housing Starts in 2025 and Outlook

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What are Housing Starts and Why They Matter

After more than a decade of structural underbuilding in the United States, the housing market entered 2025 facing persistent supply constraints, affordability pressure, and demographic headwinds. Throughout 2025, housing starts — a key leading indicator — have remained below long-term trend levels, reflecting ongoing barriers rather than cyclical recovery. Even where there are pockets of improvement, structural factors such as financing costs, labor shortages, and regulatory hurdles are dampening the potential for a robust rebound.

Housing starts measure the number of new residential building projects that begin construction in a given period. They are reported monthly by the U.S. Census Bureau (in collaboration with the U.S. Department of Housing and Urban Development) and serve as a leading indicator for:

