

# Chinese Construction Screws and Hardware Market in 2025

## 2025 中国建筑螺丝五金市场

### China's Construction Situation in 2025

A serious reading of China's construction market in 2025 requires avoiding the usual oversimplification that "construction is down." That is only partially true. The more accurate conclusion is this: residential property construction remains in deep contraction, while infrastructure, public works, manufacturing facilities, transport, and urban renewal continue to sustain overall construction activity. This makes China's construction environment a two-speed market, where one part is shrinking sharply and another remains policy-supported.

#### 1 Residential Construction Remains the Weakest Segment <sup>1</sup>

The property sector continues to be the largest source of weakness.

According to China's National Bureau of Statistics, real estate development investment in 2025 declined 17.2% year-on-year to RMB 8.28 trillion.

The most important construction indicators also stayed negative:

- ★ *Buildings newly started: 587.7 million m<sup>2</sup> (-20.4%)*
- ★ *Residential newly started: 429.8 million m<sup>2</sup> (-19.8%)*
- ★ *Buildings under construction: 6.60 billion m<sup>2</sup> (-10.0%)*
- ★ *Buildings completed: 603.5 million m<sup>2</sup> (-18.1%)*

These numbers confirm that China's traditional developer-led housing cycle is still under heavy stress. The decline is not marginal—it reflects a multi-year reset in the real estate development model, especially among highly leveraged private developers.

#### 2 Inventory Pressure Still Limits New Project Launches <sup>2</sup>

Another structural problem is unsold inventory. By the end of 2025, the floor space of newly built commercial buildings available for sale reached 766.3 million m<sup>2</sup>, while residential units alone accounted for 402.4 million m<sup>2</sup>.

This overhang matters because it reduces the urgency for local developers to:

- ★ *acquire new land*
- ★ *accelerate project launches*
- ★ *increase speculative residential supply*

In practical terms, the market is still digesting old stock before it can justify a meaningful rebound in new construction starts.

### China's Construction Situation in 2025

- 1 Residential Construction Remains the Weakest Segment
- 2 Inventory Pressure Still Limits New Project Launches
- 3 Infrastructure and Public Investment Continue to Support Construction
- 4 Urban Renewal Is Becoming a Major Construction Driver

#### 3 Infrastructure and Public Investment Continue to Support Construction <sup>3</sup>

This is the counterweight many analyses miss. While property is weak, China's state-led construction machine remains active through infrastructure and public investment.

Official 2025 data shows:

- ★ *3,109 km of new railways entered operation*
- ★ *2,862 km of high-speed rail*
- ★ *8,699 km of new and rebuilt highways*
- ★ *7 new civil airports*
- ★ *major port berth expansion and optical-fiber network projects*

This means that national construction activity has not collapsed; instead, it has shifted away from speculative housing toward strategic assets:

- ★ *transport corridors*
- ★ *logistics infrastructure*
- ★ *energy grids*
- ★ *industrial parks*
- ★ *public housing*
- ★ *urban renewal*



## 4 Urban Renewal is Becoming a Major Construction Driver <sup>4</sup>

A critical 2025 trend is renovation and regeneration rather than greenfield expansion.

Government-supported construction programs in 2025 included:

- ★ 1.21 million units of subsidized housing started or supplied
- ★ 170,000 units of dilapidated urban housing renovation
- ★ 27,000 old residential compounds newly added to renovation programs
- ★ improvements benefiting 4.99 million households

This indicates a strategic shift in China's construction model: less new speculative residential expansion, more urban repair and livability upgrades. This trend is likely to remain one of the most stable sources of construction demand through 2026–2027.

## Market Overview: Chinese Construction Screws and Hardware Market in 2025 <sup>5</sup>

The Chinese construction screws and hardware market in 2025 must be understood through the lens of China's two-speed construction economy.

While the country's developer-led residential construction cycle remains in deep contraction, overall construction activity has not weakened uniformly. Instead, demand has shifted toward infrastructure, industrial facilities, logistics assets, public housing, and urban renewal, creating a more resilient demand base for construction screws and hardware.

This shift is strategically important. The market is no longer primarily driven by speculative apartment construction and low-value interior installation products. Instead, growth is increasingly supported by state-backed and industrial construction segments, where technical performance, corrosion resistance, and application-specific engineering matter far more than simple unit price.

As a result, the Chinese construction screws and hardware market in 2025 stood at the intersection of:

- ★ infrastructure expansion
- ★ industrial resilience
- ★ export competitiveness
- ★ urban regeneration
- ★ global supply-chain realignment

1. [https://www.stats.gov.cn/english/PressRelease/202601/t20260120\\_1962353.html](https://www.stats.gov.cn/english/PressRelease/202601/t20260120_1962353.html)  
 2. [https://www.stats.gov.cn/english/PressRelease/202601/t20260120\\_1962353.html](https://www.stats.gov.cn/english/PressRelease/202601/t20260120_1962353.html)  
 3. [https://www.stats.gov.cn/english/PressRelease/202602/t20260228\\_1962661.html](https://www.stats.gov.cn/english/PressRelease/202602/t20260228_1962661.html)

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 5. <https://www.indexbox.io/store/china-fasteners-for-construction-market-analysis-forecast-size-trends-and-insights/>

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Its structural strength was reinforced by five major forces:

- ★ *continued infrastructure and public investment*
- ★ *export-led manufacturing momentum*
- ★ *growth in modular and lightweight construction systems*
- ★ *rising demand for corrosion-resistant specialty hardware*
- ★ *China's highly concentrated manufacturing clusters in Jiaxing, Yongnian, Suzhou, and Tianjin*

The importance of the construction backdrop cannot be overstated. As China's building activity shifts away from speculative housing toward railways, highways, airports, industrial parks, public housing, and urban renovation, demand is naturally moving away from low-end commodity products and toward engineered construction fastening solutions.

In this environment, China remains the world's most dominant source of construction fasteners and hardware, supported by unmatched production scale, pricing flexibility, coating capabilities, and OEM depth.

The market is becoming progressively less dependent on standard commodity screws and **increasingly driven by higher-value engineered fastening systems designed for infrastructure and industrial applications.**

According to industry estimates, **the Chinese industrial fasteners market was valued at USD 12.50 billion in 2025 and is projected to reach USD 22.79 billion by 2032, reflecting an 8.08% CAGR**, making it one of the strongest-growing segments within industrial hardware.

**Within the construction-focused subset, self-drilling and lightweight fastening systems continue to outperform standard hardware products**, largely because they are closely linked to steel structures, logistics facilities, modular construction, and renovation projects.

The Chinese industrial lightweight construction fasteners segment, which generated USD 222.9 million in 2024, is forecast to grow at 7.1% CAGR through 2034, with self-drilling screws continuing to contribute the largest share of revenue.

### Export Performance Analysis: China's Fastener Trade Reinforced 2025 Market Resilience

The export data from 2021–2025 strongly validates the broader thesis of the Chinese construction screws and hardware market's structural resilience in 2025. Even as China's domestic residential construction cycle remains under pressure, export performance demonstrates that the industry has successfully rebalanced toward infrastructure-led applications, industrial demand, and global supply-chain substitution.



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## China's Exported Fasteners (Unit: 1,000 USD):

	2021	2022	2023	2024	2025
World	9,304,668	11,178,859	9,184,552	9,574,222	10,049,983
USA	1,265,612	1,663,472	1,233,961	1,357,680	1,264,489
Vietnam	457,518	481,554	426,905	518,661	680,103
Russia	544,594	479,092	442,950	568,308	533,847
Germany	533,707	608,159	429,225	468,056	508,942
Thailand	200,246	284,957	317,615	298,360	348,254
Japan	346,444	399,601	342,233	336,253	340,383
UAE	173,006	297,719	324,018	296,365	324,284
S. Korea	405,584	577,152	408,478	334,009	302,535

### Fastest-growing markets (2025)



Vietnam: USD 680.1 million



Thailand: USD 348.3 million

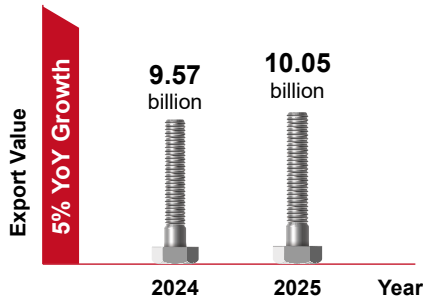


UAE: USD 324.3 million

## Total Export Recovery Shows Global Demand Stability

China's total fastener exports reached USD 10.05 billion in 2025, up from USD 9.57 billion in 2024, representing 5.0% year-on-year growth. This is especially important because it pushes exports above the 2021 level of USD 9.30 billion and marks the highest level in the five-year period.

### China's Fastener Exports in 2025



### China's Fastener Export Trend (Unit: 1,000 USD):

Year	Export Value	YoY
2021	9,304,668	—
2022	11,178,859	+20.1%
2023	9,184,552	-17.8%
2024	9,574,222	+4.2%
2025	10,049,983	+5.0%

The 2022 spike was partly a post-pandemic global restocking effect, while the 2023 correction reflected normalization and weaker Western construction cycles. What matters strategically is that 2024–2025 restored a clear growth trajectory, suggesting Chinese suppliers are regaining momentum through product upgrading and diversified geographic exposure.

### Export Geography

The destination mix reveals how Chinese fastener demand is shifting globally.

- ⊙ **The United States** remained the largest export market at USD 1.26 billion in 2025, but it was broadly flat compared with 2021 and slightly below 2024. This suggests the U.S. market has become mature and replacement-driven, with growth constrained by:
  - √ *anti-dumping vigilance*
  - √ *distributor destocking cycles*
  - √ *slower commercial construction*
  - √ *tariff-sensitive sourcing decisions*
  - √ *The bigger strategic signal comes from Southeast Asia.*
- ⊙ **Vietnam** is the standout case. Exports to Vietnam rose from USD 457.5 million in 2021 to USD 680.1 million in 2025, a cumulative increase of nearly 49%.
- ⊙ **Russia and Middle East** remained strong infrastructure-led buyers. Exports to Russia reached USD 533.8 million in 2025, remaining one of the strongest destinations despite some volatility.
- ⊙ Similarly, **the UAE** increased from USD 173.0 million in 2021 to USD 324.3 million in 2025, almost doubling in four years.
- ⊙ **Germany** recovered to USD 508.9 million in 2025, up from USD 468.1 million in 2024, showing that Europe remained a critical high-specification market.
- ⊙ **Japan** remained highly stable at USD 340.4 million, while South Korea declined from USD 405.6 million in 2021 to USD 302.5 million in 2025, suggesting stronger regional competition and some localization.



## Import Structure Analysis: What China's Fastener Imports Reveal About the 2025 Hardware Market

China's import data adds an important second layer to the 2025 market story. If exports explain China's global scale advantage, imports reveal where the domestic market still depends on foreign technology, specialty engineering, and premium-grade fastening systems.

While China exported USD 10.05 billion of fasteners in 2025, it still imported USD 2.36 billion, creating a trade surplus of approximately USD 7.69 billion. That surplus confirms China's dominant manufacturing role, but the composition of imports shows that **high-specification industrial and construction applications continue to rely on selected foreign suppliers.**


### Imported Fasteners by China (Unit: 1,000 USD):

	2021	2022	2023	2024	2025
World	3,280,632	2,857,705	2,446,476	2,481,490	2,355,774
Japan	983,976	806,726	591,455	520,051	504,334
USA	398,075	392,552	355,011	382,713	418,615
Germany	630,228	556,851	513,012	500,613	406,363


### Total Imports Continue a Multi-Year Decline

China's total fastener imports fell from USD 3.28 billion in 2021 to USD 2.36 billion in 2025, representing a cumulative decline of 28.2% over four years.

This downward trend reflects three structural shifts: **rapid domestic substitution by Chinese premium manufacturers, slower residential and machinery investment cycles, and greater localization by foreign-invested factories in China.** The decline is strategically positive for local producers because it suggests Chinese suppliers are increasingly capable of replacing imported standard and mid-tier hardware products.



**CONCRETE SCREW SUPPLIER**

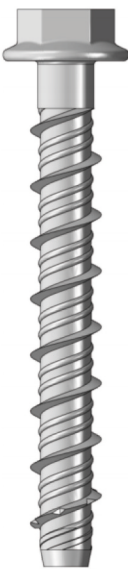



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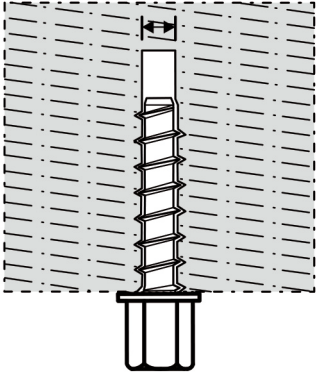
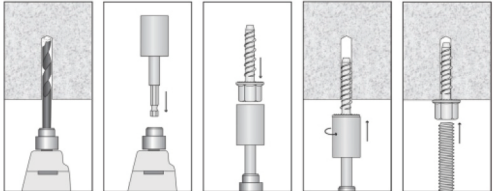
Anchor Size (mm)	Nominal Diameter of Drill Bit (mm)	Tolerance Range (mm) -(D)
M6	6.0	6.15-6.40
M8	8.0	8.20-8.45
M10	10.0	10.20-10.45
M12	12.0	12.20-10.50

**Installation information**

- Using the proper size carbide bit, drill a pilot hole at least 0.5 deeper than the desired anchor embedment.
- Clean the hole using a nylon brush and compressed air.
- A. Solid Concrete: Using an electric impact wrench, or socket wrench, insert anchor through the fixture into hole and tighten anchor until fully seated. If using an electric impact wrench, start on light torque setting to prevent over-torquing or damaging threads.
- B. Concrete Block: Using a socket wrench insert anchor into hole and hand tighten anchor until full seated. Do not use an impact wrench for installation into Concrete Block walls.

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**Import Geography**

- ◎ **Japan** remained the largest high-precision supplier: Japan remained China's largest import source in 2025 at USD 504.3 million, even after declining sharply from USD 984.0 million in 2021. This nearly 49% drop over four years is significant.
- ◎ **U.S.** imports were growing despite export leadership. A particularly revealing trend is the rise in imports from the United States, which increased from USD 398.1 million in 2021 to USD 418.6 million in 2025.
- ◎ **Germany and Taiwan:** Declining but still technically relevant. Germany's imports declined from USD 630.2 million in 2021 to USD 406.4 million in 2025, while Taiwan fell from USD 324.2 million to USD 235.0 million.

**China's Fastener Import Trend (Unit: 1,000 USD):**

Year	Import Value	YoY
2021	3,280,632	—
2022	2,857,705	-12.9%
2023	2,446,476	-14.4%
2024	2,481,490	+1.4%
2025	2,355,774	-5.1%

**Conclusion: China's Construction Fastener Market in 2025 was Stronger Than the Property Headlines Suggested**

The traditional developer-led housing cycle remained in deep contraction. New starts, investment, and unsold inventory all confirmed that speculative residential construction was still under significant pressure. This weakened demand in lower-value, volume-driven categories tied to apartment interiors and conventional housing installation.

What the data consistently show is that China's construction economy has shifted into a two-speed structure, and the fastener market has adapted accordingly.

The decline in housing has been increasingly offset by state-backed infrastructure, railways, highways, airports, logistics hubs, industrial parks, public housing, and urban renewal projects. These segments demand more technically advanced products, longer corrosion life, stricter standards, and greater engineering precision.

As a result, the centre of gravity in the market is moving away from commodity products and toward:

- ★ *self-drilling steel construction screws*
- ★ *roofing and façade fixing systems*
- ★ *solar mounting hardware*
- ★ *anchors and expansion systems*
- ★ *precast concrete connections*
- ★ *industrialized building accessories*
- ★ *corrosion-resistant specialty fastening solutions* ■

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