

# Italian Home Improvements and Fastening Tool Market Demand in 2025

2025年義大利家居裝潢與緊固工具市場需求

Italy's home improvement market in 2025 remained cautious, but it was not weak across all segments. The available retail and construction figures suggest a selective demand environment rather than a broad downturn. For fastening tools and related hardware, this distinction matters. The market did not support a general growth story, but it continued to generate demand in practical, project-linked, and maintenance-oriented categories.

The most relevant conclusion is that Italy in 2025 was a market of functional demand. Repair, installation, and light construction activity supported sales, while larger discretionary renovation categories remained under greater pressure. **For manufacturers, distributors, and importers in fastening and tooling, the year was less about chasing broad expansion and more about understanding where demand was still moving.**

## Retail Market Performance Stayed Slightly Negative, but Not Fragile

The Italian DIY retail channel provides the clearest short-term signal for home improvement demand. In 2024, sales in Italian DIY stores declined by 0.7% to EUR 6.2768 billion. In the first half of 2025, sales reached EUR 3.0897 billion, down 0.9% year on year.

This points to a market that was still under pressure, but only mildly so. It was not a sharp contraction. Instead, it reflects a retail environment where spending remained active, but more selective. For the fastening sector, that usually means continued movement in essential items, while larger baskets linked to full refurbishments or major upgrades remain less predictable.

Table 1. Italy DIY Retail Market, Latest Available Figures

| Indicator       | Period         | Value         | YoY change |
|-----------------|----------------|---------------|------------|
| DIY Store Sales | Full year 2024 | EUR 6.2768 bn | -0.7%      |
| DIY Store Sales | H1 2025        | EUR 3.0897 bn | -0.9%      |

As shown in Table 2, Q2 2025 did not follow a uniform trend. A weak April was followed by modest recovery in May and June, indicating that Italian DIY demand remained volatile but not uniformly negative. For the fastening industry, this suggests that replenishment demand continued, although with less consistent timing.

Table 2. Italy DIY Monthly Trend, Q2 2025

| Month | YoY change |
|-------|------------|
| April | -12.3%     |
| May   | +5.7%      |
| June  | +2.9%      |

Demand did not disappear, but it became less consistent in timing. For suppliers, this typically means a more volatile replenishment cycle, particularly in categories linked to larger planned projects.

## What the Category Mix Says About Fastening Demand

As shown in Table 3, category performance in Italy was uneven. While several renovation-sensitive segments declined in 2024, **the construction category grew 12% in the first half of 2025 and represented 15.1% of total sales.** For the fastening industry, this is a more useful signal than the overall market headline, since demand is more closely tied to installation and project activity.

Table 3. Selected Retail Category Signals Relevant to Fastening Demand

| Category Signal                      | Period  | Performance |
|--------------------------------------|---------|-------------|
| Building Materials                   | 2024    | -4%         |
| Bathroom and Plumbing                | 2024    | -8%         |
| Garden                               | 2024    | -5%         |
| Tools And Machinery                  | 2024    | -1%         |
| Construction Category Share of Sales | H1 2025 | 15.1%       |
| Construction Category Growth         | H1 2025 | +12%        |



This mix is important. It shows that the market was not favoring all home improvement categories equally. More decorative, lifestyle-oriented, or renovation-sensitive areas remained weaker, while construction-related demand showed better resilience.

For fastening tools, that is a constructive signal. Fasteners, anchors, brackets, consumables, bits, and installation hardware are much more closely linked to construction, repair, and assembly activity than to purely aesthetic spending. This means that even in a market with only modest top-line performance, the fastening segment could still find support where demand was tied to practical jobs.

### Three Demand Layers Explain the 2025 Market

Italian fastening demand in 2025 can be understood through three practical layers.

The first layer is maintenance and replacement demand. This includes standard screws, plugs, wall anchors, hinges, repair fixings, bits, blades, and basic hand tools. This layer tends to remain the most resilient because households, installers, and small trades still need to complete everyday repairs and replacements.

The second layer is small project demand. This includes shelving, furniture installation, gates, fences, minor carpentry, storage upgrades, and light kitchen or bathroom fitting work. This layer often remains active even when consumer sentiment is cautious because the projects are practical and relatively affordable.

The third layer is major renovation and upgrade demand. This is the most volatile part of the market. It drives larger baskets, premium tool purchases, and higher-value specialist fixing systems. In Italy during 2025, this layer appears to have remained under more pressure.

This three-layer reading fits the available data well. **Slightly negative retail totals, stronger construction-related category performance, and continued weakness in bathroom-related sales all suggest that the market leaned toward functional work rather than broad discretionary improvement spending.**

### Housing Indicators Show Conditions Improved Through the Year

Retail data are only part of the story. The fastening market is also influenced by what is happening upstream in residential and construction activity.

**Italy's building permit indicators point to a residential pipeline that remained under pressure in 2025, but improved steadily as the year progressed. The trend does not suggest a full recovery, but it does indicate that the pace of weakness was easing.** For the fastening industry, this is an important signal because a stabilizing residential pipeline can gradually support downstream demand for installation hardware, fixing systems, and fit-out related products.



Table 4. Italy Residential Building Permit Indicators, 2025

| Indicator  | Q1 2025 | Q2 2025 | Q3 2025 |
|--|---------|---------|---------|
| YoY Change in Dwellings in New Residential Buildings | -19.4%  | -7.3%   | -0.6%   |
| QoQ Seasonally Adjusted Change                       | ---     | +1.5%   | +5.8%   |
| Seasonally Adjusted Dwellings                        | 12,333  | 12,612  | 13,342  |

## Construction Activity Was Firmer Than Retail Sentiment Suggested

Construction output provides a more direct reading of industrial demand.

As shown in **Table 5**, **construction activity in Italy remained positive during 2025, suggesting a firmer demand base than retail sentiment alone would indicate.** For the fastening industry, this supports a more constructive reading of installation-driven and project-linked demand.

Table 5. Italy Construction Activity Indicators

| Indicator                                       | Period               | Result |
|---|----------------------|--------|
| Production in Construction, Seasonally Adjusted | Sep 2025 vs Aug 2025 | +0.9%  |
| Production in Construction, Calendar Adjusted   | Sep 2025 YoY         | +4.4%  |
| Production in Construction, Calendar Adjusted   | Jan-Sep 2025         | +4.7%  |

## What This Means for Fastening Suppliers and Distributors

From an industrial perspective, Italy in 2025 was a precision market.

The first implication is that core assortment mattered more than wide assortment. In selective markets, buyers are less patient. They want the right fixing, the right dimension, and the right accessory immediately. Availability in fast-moving SKUs becomes more important than breadth for slower-moving lines.

The second implication is that practical-use categories likely outperformed purely discretionary ones. Products linked to repair, installation, and light project work were better aligned with the actual pattern of demand.

The third implication is that category-level planning mattered more than headline market sentiment. A market that is slightly negative overall can still create solid opportunities for suppliers positioned in the right applications.

The fourth implication is timing. **The improvement in permits and construction activity suggests that underlying conditions were better by the second half of the year than they were at the start.** This does not change the fact that 2025 remained selective, but it does help explain why some segments held up better than others.

## Conclusion

Italy's home improvements and fastening tool market in 2025 was stable, selective, and function-driven. Retail sales in the DIY channel remained slightly negative, but the decline was limited. At the same time, construction-related categories improved, residential permit indicators became less weak through the year, and construction output posted positive growth.

Taken together, these figures suggest a clear market reality. **Demand in Italy during 2025 was driven less by broad renovation confidence and more by maintenance, installation, small project work, and construction-linked activity.** For fastening industry players, that is the most important commercial reading of the year. ■

### References

- DIY International, Italy DIY market reports, 2024 results and H1 2025 update.
- ISTAT, Building permits indicators, Q1-Q3 2025.
- ISTAT, Production in the construction sector, 2025.

