Siddall & Hilton

JUNE 2025 FENCING INSIGHT REPORT

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Introduction

Welcome to the inaugural edition of the UK Fencing Market Insights Report, published by Siddall & Hilton, the UK's leading manufacturer of welded mesh fencing panels.

Launched in June 2025, this quarterly report series is designed to offer timely, practical insight into the market forces shaping our industry. At a time of rising uncertainty — driven by steel price volatility, slowing infrastructure pipelines, and increasing pressure on system costs — we believe manufacturers, contractors, and specifiers need clear, actionable intelligence to stay competitive and compliant.

This edition explores the latest steel pricing and construction trends, shifts in procurement behaviour, and the real-world implications of quality compromises within the fencing sector. Drawing on data from EUROFER, Glenigan, Make UK, and our own market intelligence, the report pinpoints where risks are rising — and where opportunities remain.

About Siddall & Hilton

Based in West Yorkshire, Siddall & Hilton is a long-established British manufacturer supplying high-quality welded mesh panels to many of the UK's leading fencing system providers. We don't make the full system — but we do make the mesh that makes it work.

Our commitment to British Standards, ISO 9001-certified processes, and rigorous quality control ensures that our panels consistently perform — from SR-rated perimeter systems to public infrastructure, schools, utilities, and beyond.

We created this report series because we believe market knowledge is a shared responsibility. When quality matters — as it does in every security-critical installation — clarity, confidence, and consistency become essential. That's why we're investing in thought leadership: to support our partners, strengthen industry standards, and help the market make informed decisions.

Whether you're facing tender pressure, chasing reliability, or planning strategically, we hope you find this insight report a valuable companion.

Navigating Steel Volatility: The Importance of Quality and Consistency in a Shifting Market

Market Context

- Steel demand across Europe remains weak, continuing a negative trend that began in 2022. According to EUROFER's latest data, apparent steel consumption fell again in 2024 by -2.3% — a sharper drop than previously forecast.
- Wire rod prices, critical to our welded mesh production at Siddall and Hilton, have mirrored this trend. Lower overall steel consumption, partially offset by manufacturers reducing capacity has suppressed raw material pricing but created volatility, with imports filling gaps in supply, often at inconsistent standards.
- Imports now account for 28% of apparent EU steel consumption— a historical high — meaning European manufacturers are competing with increasingly varied (and often lower quality) material grades.

How This Affects Siddall and Hilton

- As a leading British welded mesh manufacturer, Siddall and Hilton primarily purchases high-grade wire, and while softer pricing can ease short-term cost pressures, the variability in global supply introduces challenges around consistency and lead times.
- Maintaining British Standards and strict manufacturing tolerances becomes harder — and more critical — when raw material quality from external markets becomes less predictable.
- Investment in quality control processes and supplier relationships remains key for us to protect product integrity, ensuring we continue to deliver to specification, despite raw material volatility.

Effects on the Fencing Sector: System Manufacturers and Contractors

- System manufacturers are under pressure to balance pricing competitiveness with system integrity. When steel prices drop, the temptation to chase cheaper mesh products — often sourced from lower-cost, lower-quality imports — increases.

- However, system warranties, security ratings (like LPS 1175), and long-term durability all depend on mesh panels made from high-grade wire rod, manufactured to consistent standards. Cutting corners now can result in costly remedial works, reputational damage, and non-compliance later.

- Contractors face similar dilemmas: competitive tendering environments mean every penny counts. However, using sub-standard fencing panels risks installation failures, accelerated corrosion, and dissatisfied end-users — particularly in security-critical applications such as schools, utilities, and infrastructure projects.

Why Quality Matters Now More Than Ever

In an environment where cheap imports are flooding the market and steel prices fluctuate, choosing trusted, consistent British-made welded mesh becomes a business-critical decision — not just a technical one.

Quality panels:

- Fit first time — saving on site time and rework.
- Perform to security ratings — protecting contracts and compliance.
- Offer predictable lifespan — reducing lifecycle costs for clients.
- Protect reputation —ensuring project delivery is professional, compliant, durable and on-time.

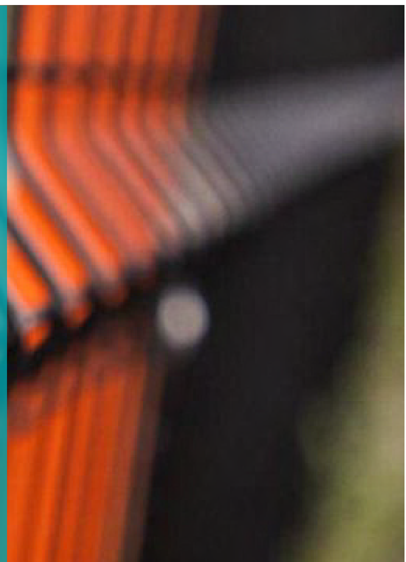
At Siddall and Hilton, our commitment to British Standards, traceability, and operational excellence gives contractors, specifiers, and system manufacturers the confidence they need — even in a volatile market.

Final Thoughts?

Steel prices are uncertain. Demand is patchy. And pressures to cut costs are real.

But standards don't change...

By continuing to invest in material quality, manufacturing expertise, and technical support, Siddall and Hilton stands alongside system manufacturers and contractors — ensuring that projects remain secure, durable, and profitable, even through challenging times.



Glenigan Index: Early Recovery Signs — But Civils and Infrastructure Still in Reverse

In a sector as time-sensitive as construction, early indicators like the Glenigan Index are invaluable. Tracking live UK project-starts, this data offers vital foresight into where construction momentum is building — or retreating. For fencing system manufacturers, contractors, and mesh suppliers, these trends often foreshadow the real-world demand felt months later.

The latest figures (three months to April 2025) show a modest upturn in overall project activity. Starts rose 7% compared to the previous quarter and now stand 3% above the same period in 2024. It's a welcome reversal of the declines seen in Q1 — but this improvement is unevenly spread.

The critical takeaway for the fencing sector? The recovery is being powered by residential work — not infrastructure or civil engineering.

Civil engineering starts dropped 22%, quarter-on-quarter and year-on-year. This includes some of the most fence-intensive sectors, such as utilities, highways, and infrastructure — all experiencing significant slowdowns.

Non-residential construction fell 5%, with further year-on-year decline of 12%. While healthcare, community and office projects offered some relief, key sectors like education, retail, and leisure continue to lag.

This matters for the fencing supply chain. Much of the demand for high-spec, high-volume welded mesh — such as perimeter security panels for utilities, transport, or public sector schemes — originates from infrastructure and non-residential work. When these sectors stall, it puts pressure on system manufacturers and contractors to chase fewer, more competitive opportunities.

What This Means for System Manufacturers

For fencing system manufacturers, this ongoing softness in civils and commercial starts translates to increased competition, tighter margins, and reduced visibility on forward orders. To maintain momentum, the focus must now be on value — not volume.
That means:

- Enhancing support around installation and specification.
- Demonstrating quality as a cost-saver (through reduced rework, longer lifespan, and reliability).
- Offering stock availability and short lead times as a differentiator — especially where site schedules are fluid or funding is stop-start.

What This Means for Contractors

Fencing contractors face an increasingly tough tendering environment. With fewer large projects breaking ground — particularly in infrastructure — success will come from diversification and strategic partnerships.

Bundling fencing with complementary services (such as gates, vehicle access or alarm integration) can help win projects.

Looking Ahead

With infrastructure still under pressure and civil engineering workloads shrinking, many in the fencing market will need to shift focus regionally or vertically. The South West, South East, and North East regions are showing relative strength — and could be critical to maintaining order flow in the second half of 2025.

Regional Performance: Pockets of Opportunity

One critical trend to watch is the growing regional divergence in project activity.

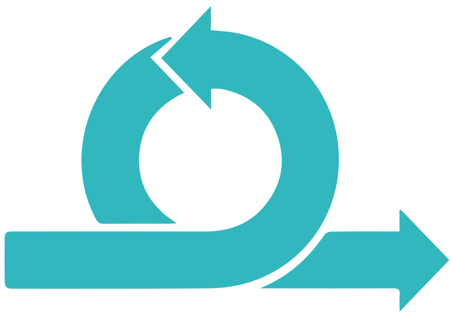
North East: One of the few bright spots, the North East recorded a 6% increase compared to the previous quarter and stood 17% higher year-on-year. Major civil engineering and community projects are fuelling demand in the region. Manufacturers and contractors who can pivot resources towards the North East could tap into more stable workflows.

South West: Although the South West saw a 14% quarterly decline, it still managed a 3% year-on-year increase — suggesting underlying resilience, particularly in residential and public sector projects. Fencing businesses active here should stay engaged, as the area could see a faster recovery once funding flows through.

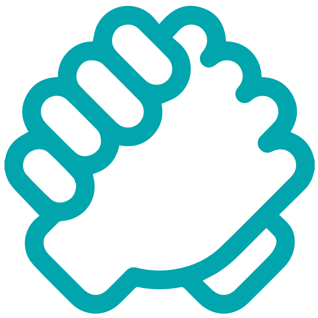
London and South East: These traditionally strong regions are now facing some of the steepest declines, with London construction starts down 10% quarter-on-quarter and 40% lower year-on-year. The South East fell 11% from the previous quarter and 18% compared to 2024. The commercial property downturn, slowing infrastructure projects, and rising build costs in the capital are hitting the market hard. For fencing businesses, it may be time to deprioritise London-focused strategies temporarily and look to more active regions.

Northern Ireland: The steepest regional fall, with project starts down 43% quarter-on-quarter and 11% year-on-year. Contractors and manufacturers with exposure here should plan for very subdued activity levels and consider shifting capacity elsewhere.

Strategic Takeaways for the Fencing Sector



Be agile: System manufacturers and contractors must stay close to regional trends and be ready to pivot resources quickly to where demand is strongest.



Support over sell: With competition fierce, providing technical expertise, installation support, and cost-saving solutions will be key to building customer loyalty.

Focus on compliance: Especially in sectors like schools, healthcare, and utilities where security and quality standards remain non-negotiable, even in a tighter

Partner smarter: Stronger collaboration between manufacturers and contractors will be essential to win bids and deliver value in a more competitive environment.

UK Manufacturing Outlook Q1 2025: What It Means for Fencing, Mesh, and Beyond

The latest Make UK/BDO Manufacturing Outlook paints a sobering picture for the start of 2025. Manufacturing output, which had shown signs of stabilisation towards the end of last year, has now officially tipped into contraction Phase — registering a balance of -1%, down sharply from +20% the previous quarter. While minor at a sector-wide level, this marks the first Q1 contraction since 2016 and highlights the persistent challenges UK industry continues to face.

Domestic orders have weakened for six consecutive quarters, with a -7% balance now recorded, while export orders — a long-time backstop for manufacturers — have slid to just +1%. Confidence across the sector remains surprisingly resilient, but investment is slowing, and employment is beginning to contract. It's a market that rewards preparation, not complacency.

How This Impacts Siddall and Hilton — and the Fencing Sector as a Whole

While broader manufacturing output is softening, Siddall and Hilton is structured to not just weather these conditions, but to support our customers through them. Some key impacts — and how we counter them — include:

Reduced fabrication activity:
System manufacturers who rely on welded mesh products may face sporadic project pipelines. To help, Siddall and Hilton maintains substantial stock levels of standard panels, ensuring customers can access critical mesh products without the long lead times often associated with slower markets.

Pressure on inventory management:
Contractors and stockholders are naturally cautious in uncertain climates, leaning towards just-in-time procurement models. should this be Siddall & Hilton's responsive production scheduling and high-quality standard panel ranges give our partners the flexibility they need to meet project demands without overcommitting on inventory.

Tighter competition and downward pressure on margins:
Where some see a race to the bottom on price, we focus on uncompromising quality. Siddall and Hilton products are manufactured to rigorous British Standards, with superior weld strength, flatness, and longevity. In a market where every penny counts, choosing a product that lasts — and reduces costly rework or early replacement — becomes a true differentiator.

In short: while others may be forced to cut corners, Siddall and Hilton continues to invest in product quality, operational efficiency, and customer support — providing real value in a challenging environment.

What System Manufacturers and Contractors Should Be Thinking About

For system manufacturers, responsiveness and adaptability remain key. Product ranges that can pivot into growing sectors — such as utilities, renewables, and public realm infrastructure — will be better placed to weather any slowdowns in traditional markets like commercial construction.

Contractors, meanwhile, should be mindful of potential supply chain volatility. Working closely with trusted system manufacturers— who offer traceability, British Standards compliance, and responsive service — is critical to maintaining project momentum and protecting margins.

Above all, in a quieter market, quality will be even more visible. As pressures build, specifying robust, compliant products from reputable UK manufacturers isn't just about best practice — it's about de-risking projects, safeguarding reputations, and maintaining profitability.

What the Latest Construction Data Means for the Fencing Sector and System Manufacturers

The Q1 2025 construction data may show zero overall growth, but look deeper and there are important shifts that directly impact the fencing industry. The standout factor is the strength in infrastructure — up 2.5% in March and a major contributor to the 26.6% quarterly rise in new orders. This signals increasing momentum in long-term, capital-intensive projects like transport, utilities, logistics hubs, and energy — all areas that rely heavily on perimeter fencing at scale.

For the fencing market, this is both a challenge and an opportunity. Projects are getting larger and more time-sensitive, meaning system manufacturers must be able to scale delivery without sacrificing quality or reliability. Contractors under pressure to hit timelines and budgets will prioritise suppliers who can offer consistency, availability, and proven performance.
At the same time, the drop in repair and maintenance (-1.2%) shows a shift away from reactive fixes and towards upfront investment in new installations — reinforcing the demand for robust systems that perform from day one.

For system manufacturers, this environment means forward planning, agility in sourcing, and strong relationships with mesh panel suppliers who can deliver reliably. Those who can guarantee short lead times and a dependable supply chain will have a real competitive edge as the infrastructure pipeline accelerates.

Bottom Line: This isn't just a volume game. It's about who can operate smarter — with trusted partnerships, reliable lead times, and the confidence to take on larger, more complex installations without second-guessing the supply chain.

Key Takeaways:

Infrastructure momentum is real — and we're ready to meet the mesh demand it generates.

Fencing manufacturers that align with reliable UK suppliers will be better placed to win and deliver.

The market is cautious, but confidence is growing. We're helping our customers stay one step ahead.

The message from us is simple: we're not waiting to see what happens — we're preparing for what's next.

Conclusion: Steady Hands in Shifting Ground

As steel prices fluctuate, demand cools in some regions, and competition sharpens, the path ahead for the fencing sector won't be linear. But with uncertainty comes opportunity — for those who prepare, adapt, and focus on quality.

At Siddall & Hilton, we're not just reacting to market changes — we're anticipating them. By investing in our people, our processes, and our partnerships, we continue to support system manufacturers with dependable British-made mesh, tailored service, on the ground stock and the flexibility needed to thrive in a changing landscape.

We're here to help you deliver — securely, consistently, and competitively — no matter how the market shifts.

Let's talk about how we can support your next project.

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