THORNTON
FENCE CONSULTING
GROUP
FENCETECH 2023
& METALfab
OKLAHOMA CITY
AFA NOMMA
Economic Heartbeat of the Fence Industry for 2023
with
TONY THORNTON
AFA

What is your Prediction

Economic Heartbeat of the Fence Industry for 2023

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Trends Driving Demands

- Real Estate Development
- Residential End- User segments post COVID (62% in 2021)
- Federal Government Infrastructure
- Chain Link and Ornamental Dominates Commercial Segment (52%)
- Metal (chain link/ornamental) and PVC Dominates the Residential Segment

Trends Driving Demands

- Power Plant Security Breach
- Industrial and Commercial Construction
- Product Substitutes/Imported Products
- Mergers & Acquisitions
- Research & Development

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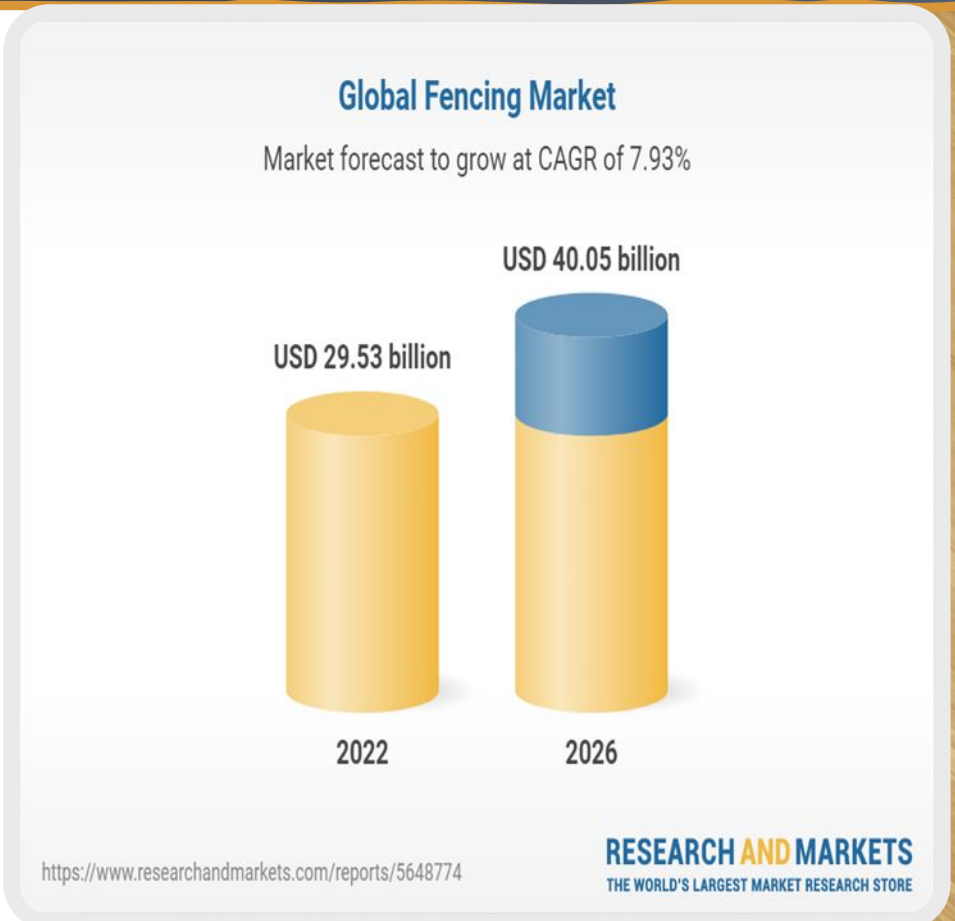
Global Fencing Market

- Expected growth from /$28.19 billion in 2021 to $29.53 billion for 2022
- Compound Annual Growth Rate of 4.75%/5.5% for 2022
- Expected to reach $40.05 billion in 2026 at CAGR of 7.73%

*Research and Markets/Grandview Research



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Global Market Report Countries Covered

Australia
Brazil
China
France
Germany
India
Indonesia
Japan
Russia
South Korea
United Kingdom
United States

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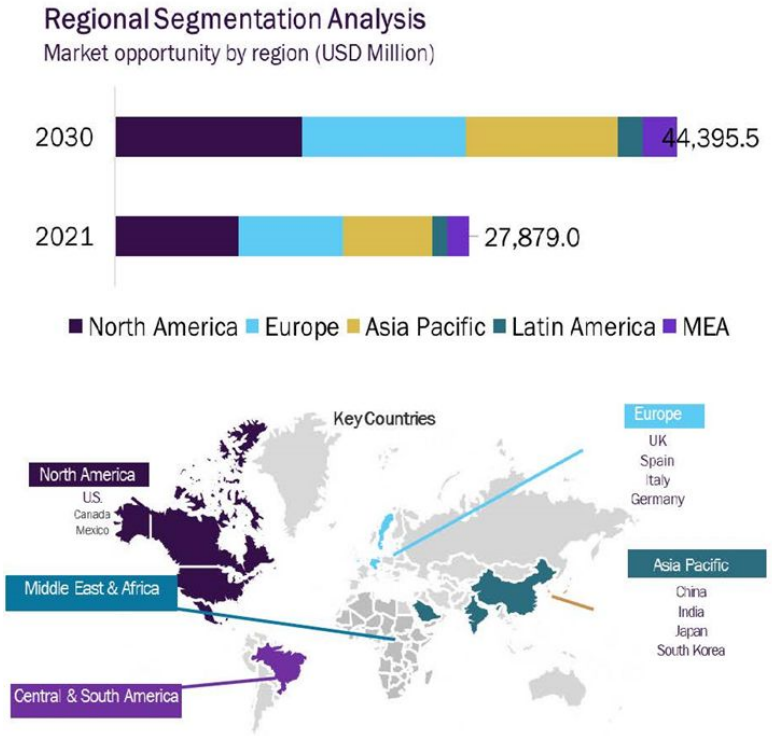
North America was the largest region in 2021 market



KEY FINDING

North America led the fencing market and continuous expansion in construction activities allows the region to dominate the worldwide market

**Market opportunity equates to Incremental growth in volume & value (Δ=Y2030-Y2021)
**Growth momentum is factor of comparison between segmental CAGR% Vs overall market CAGR%

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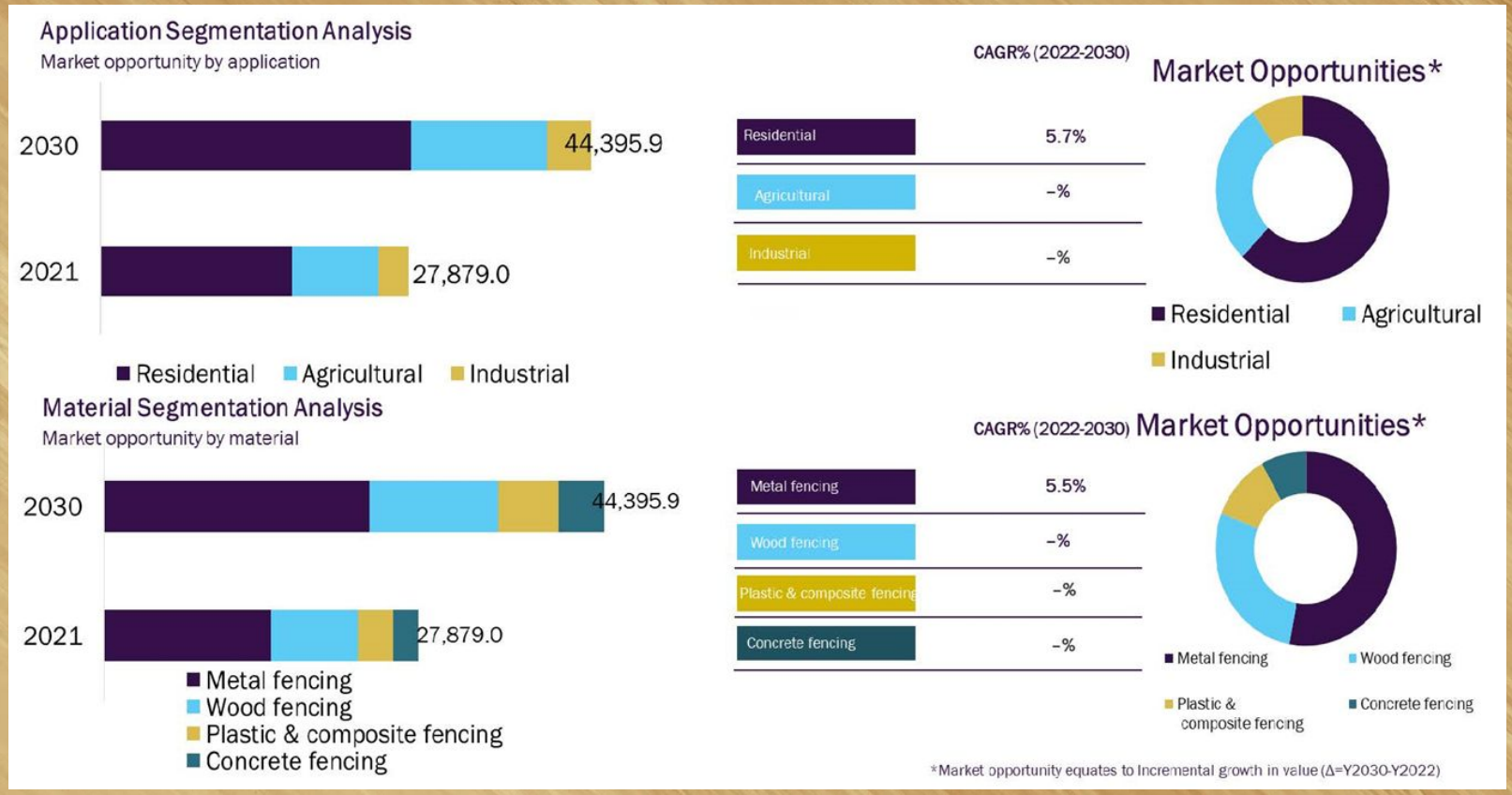
Market Opportunities



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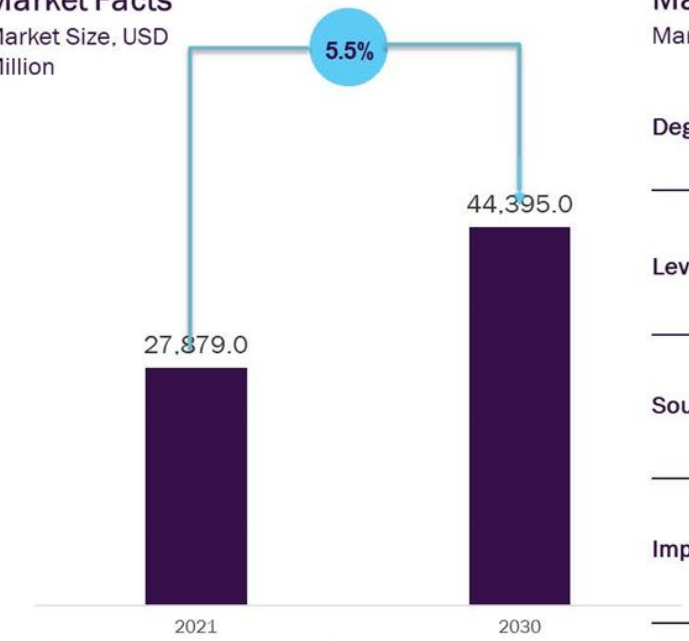
Market Outlook

Market Facts

Market Size, USD Million



Market Growth Stage	Pace of Market Growth
Medium	ACCELERATING
Low | Medium | High | Exponential	Accelerating | Decelerating

Market Characteristics

Market Attributes

	LOW	MEDIUM	HIGH
Degree of Innovation			
Level of M&A Activities			
Source of Disruption			
Impact of Regulations			
Product Substitutes			

Vendor Preview

Market Participants

Key Vendors

- Allied Tube & Conduit
- Ameristar Fence Products Incorporated
- Associated Materials LLC
- Bekaert
- Betafence NV
- CertainTeed Corporation
- Gregory Industries, Inc.
- Jerith Manufacturing Company Inc.
- Long Fence Company Inc.
- Ply Gem Holdings Inc.
- Poly Vinyl Creations Inc.

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Material Trends

- The metal fencing segment dominated the market in 2021 and was valued at USD 14,764.1 Million.
- It is anticipated to reach USD 23,585.6 Million by 2030.
- Metal has been the most preferred material used in fencing application and is expected to maintain its dominance over the forecast period owing to the superior robust properties offered.
- Concrete fencing is anticipated to experience significant growth and reach USD 4,099.7 Million by 2030, registering a CAGR of 7.1% from 2022 to 2030.

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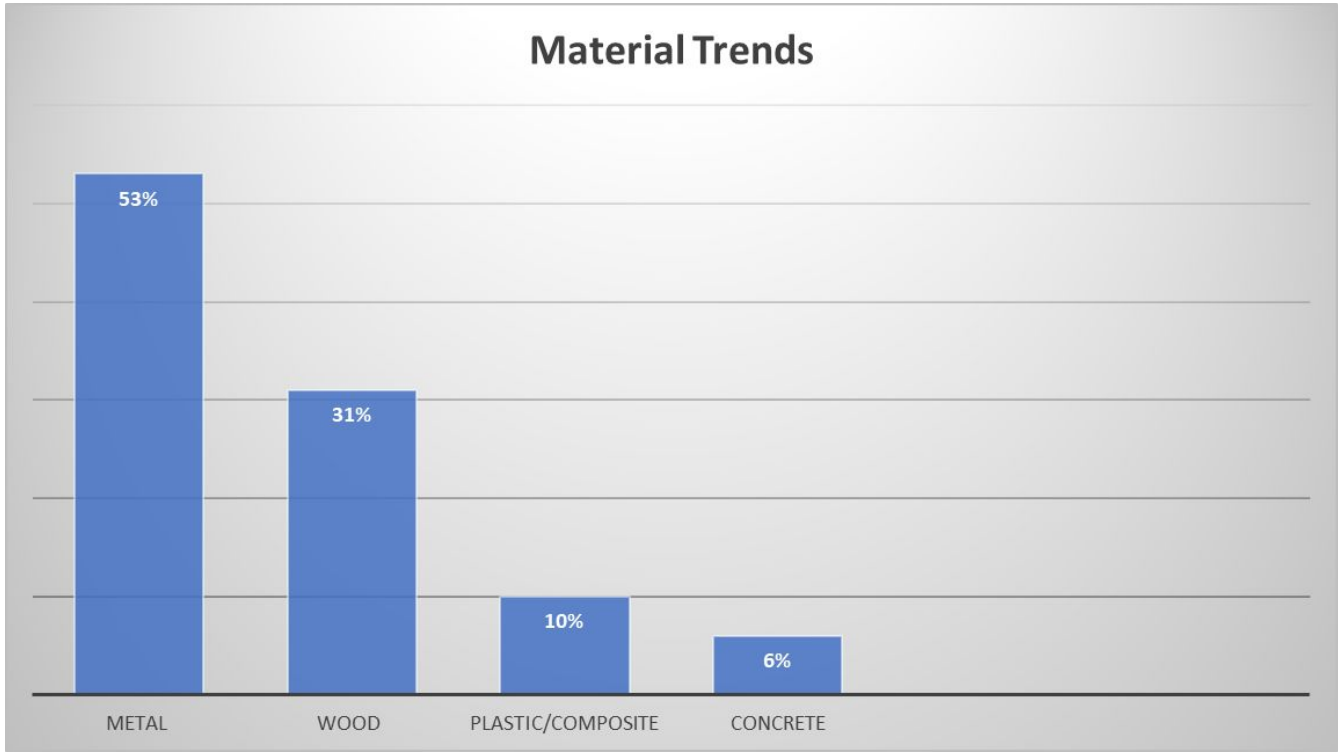
Material Trends



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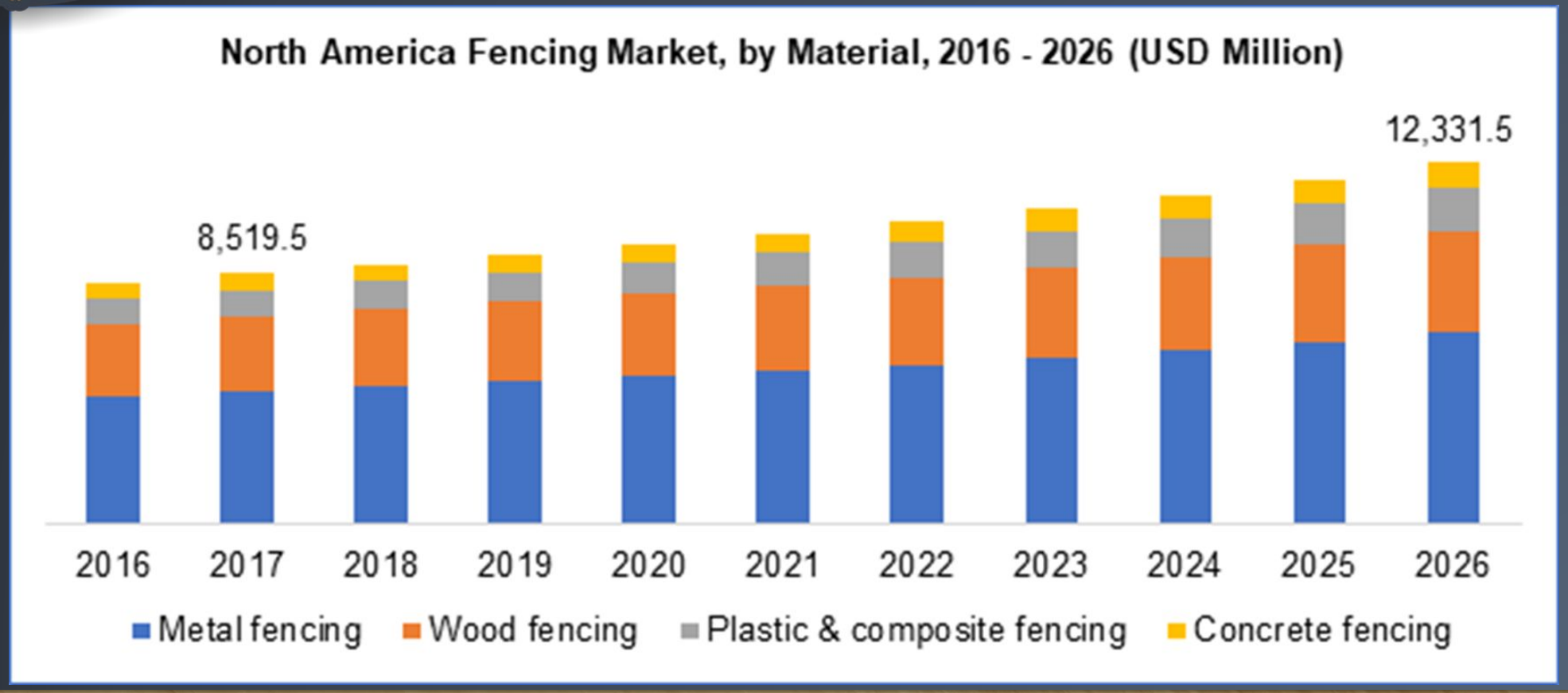

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Distribution Trends

- Based on distribution channel, the fencing market has been segmented into online and retail.
- The retail segment dominated the market in 2021 and was value at USD 21,357.8 million.
- It is anticipated to reach USD 31,477.1 million by 2030.
- The online segmented is anticipated to experience significant growth and reach USD million by 2030, registering a CAGR of 8.0% over the forecast

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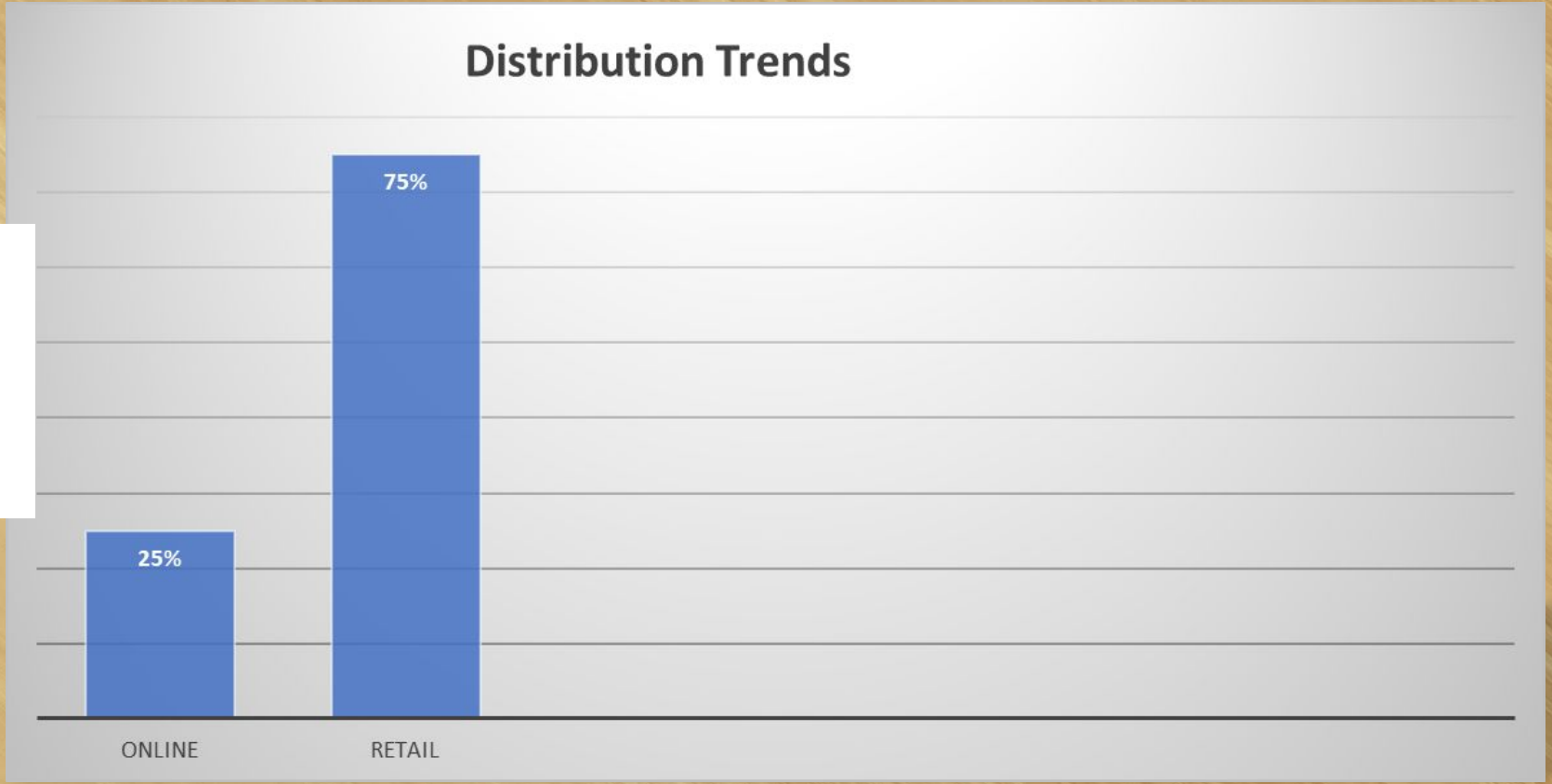
Distribution Trends



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Installation Trends

- Based on installation the fencing market has been segmented into Do-It-Yourself and contractor.
- The contractor segment dominated the market in 2021 and was valued at USD 21,620.8 million.
- It is anticipated to reach USD 35,674.5 million by 2030, registering the highest CAGR of 5.9% from 2022 to 2030.
- The DIY segment anticipated to register a considerable growth and reach USD 8,721.3 million by 2030, registering a CAGR of 3.9% from 2022 to 2030.

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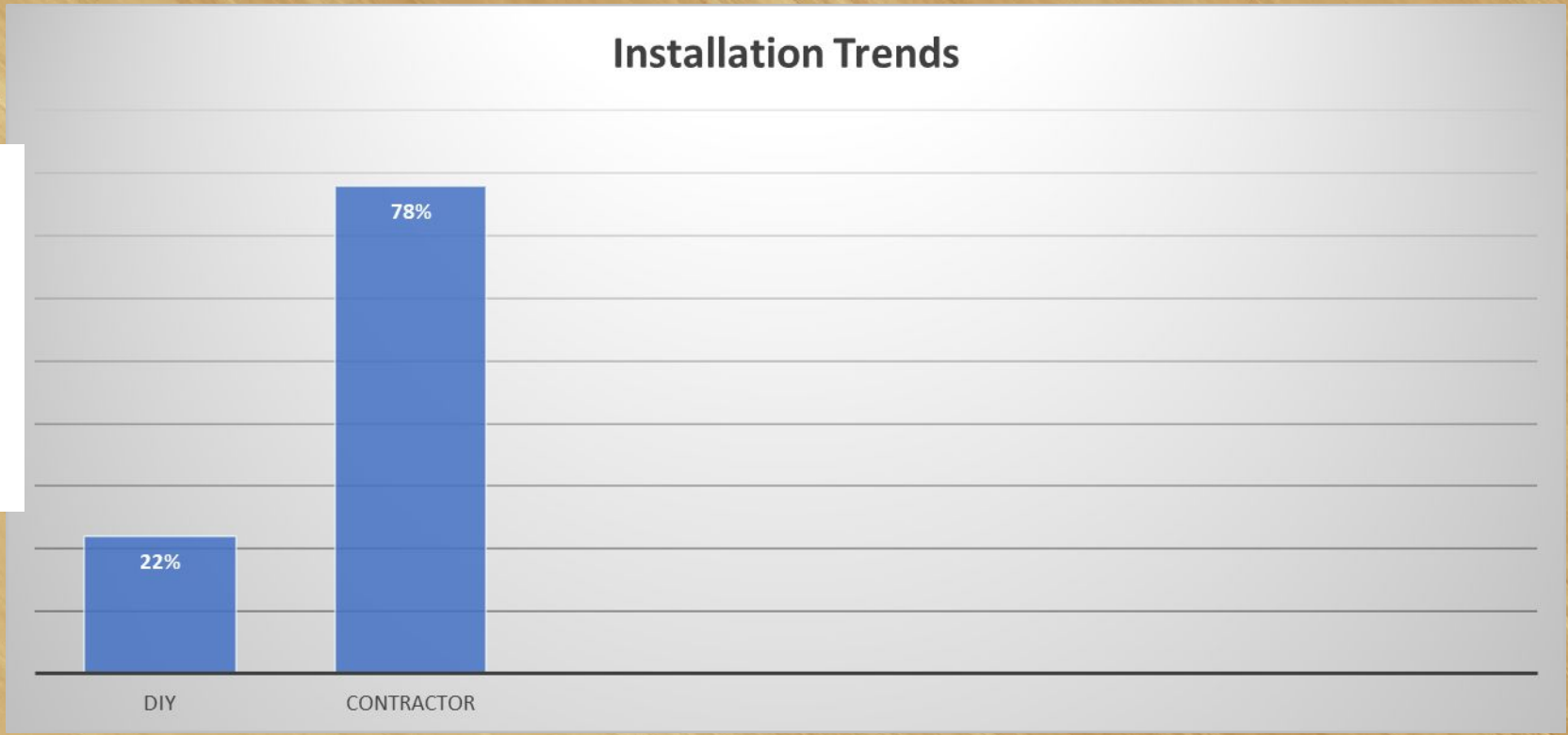
Installation Trends



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Application Trends

- The residential fencing segment dominated the market and was valued at USD 17,322.9 million in 2021.
- It is anticipated to reach USD 28,084.8 million by 2030, registering the highest CAGR of 5.7% from 2021 to 2030.
- This segment is expected to witness growth owing to the significant increase in new construction activities and remodeling market segments.

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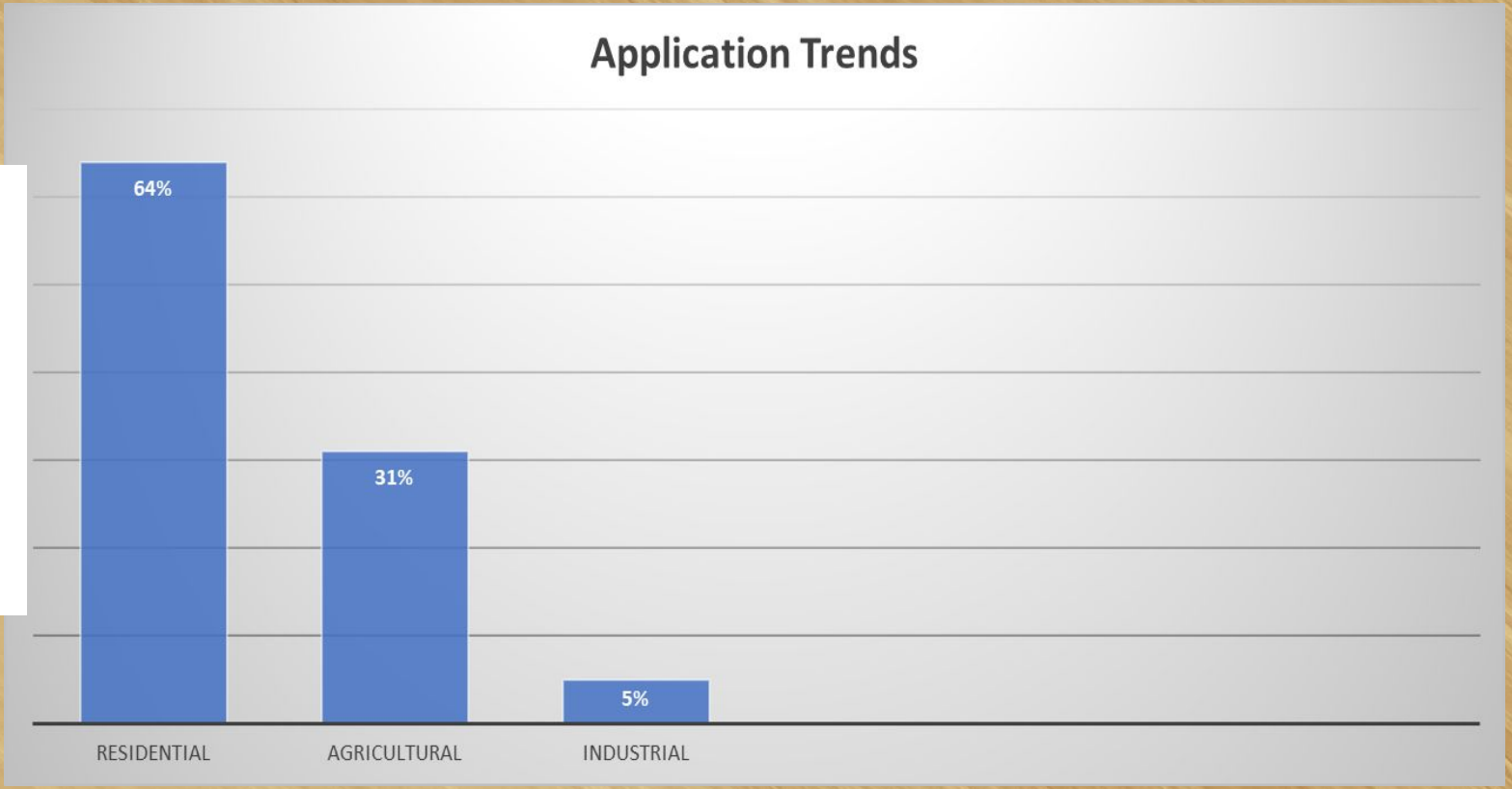
Application Trends



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Industrial Trends

- ✔ The global fencing market is segmented
- ✔ Government
- ✔ Petroleum & Chemicals
- ✔ Military & Defense
- ✔ Mining
- ✔ Energy & Power (expected to register the highest CAGR of %5.2)
- ✔ Transport

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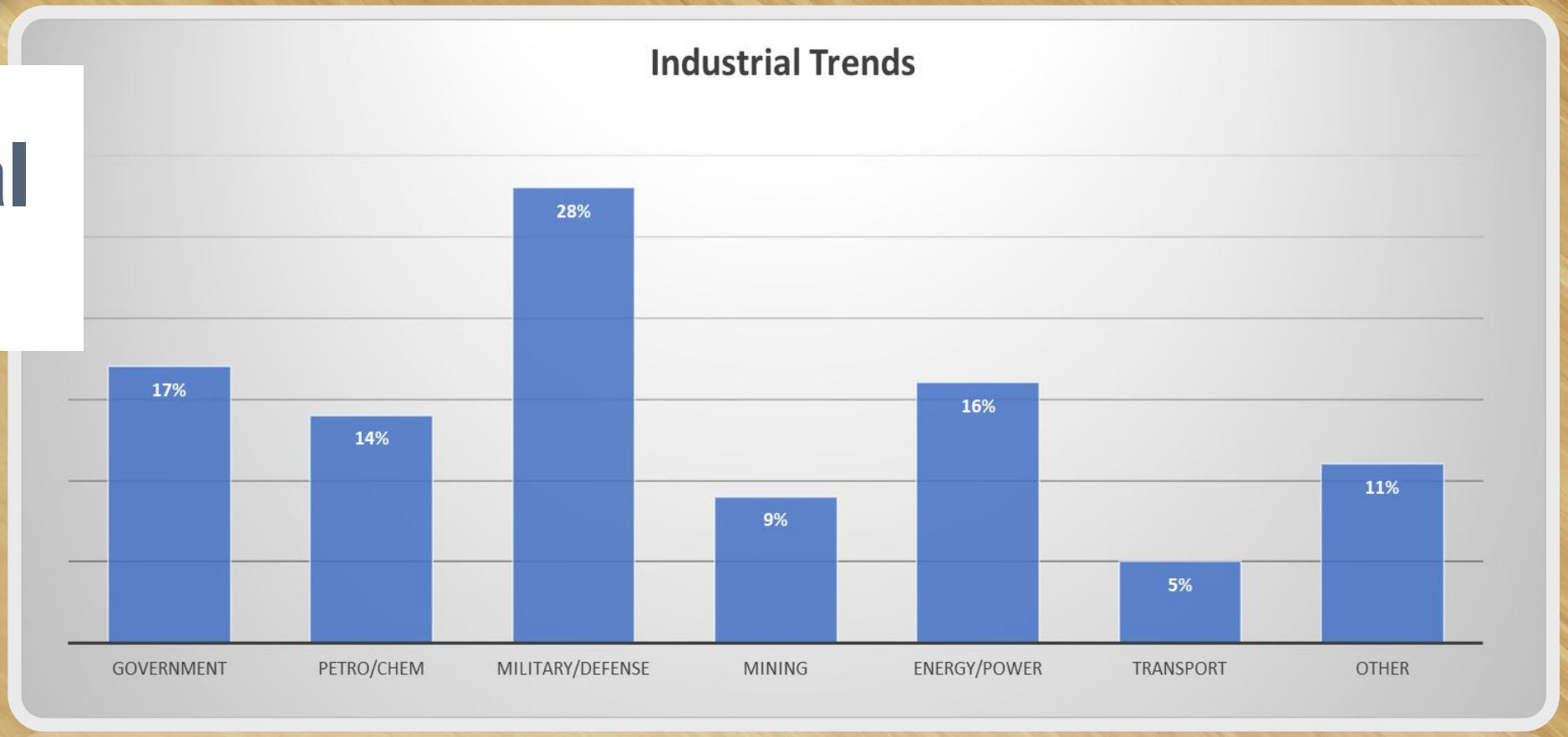
Industrial Trends



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Regional Trends

- North America led the fencing market and continuous expansion in construction activities allows the region to dominate the worldwide market.
- More than 50,000 fence contractors work in the U. S. alone. These contractors supply materials and provide services all over the world.
- The regional market is also expected to increase significantly throughout the projected period.
- In addition, the rising demand for home decorating products from households across North America is expected to boost regional market expansion.

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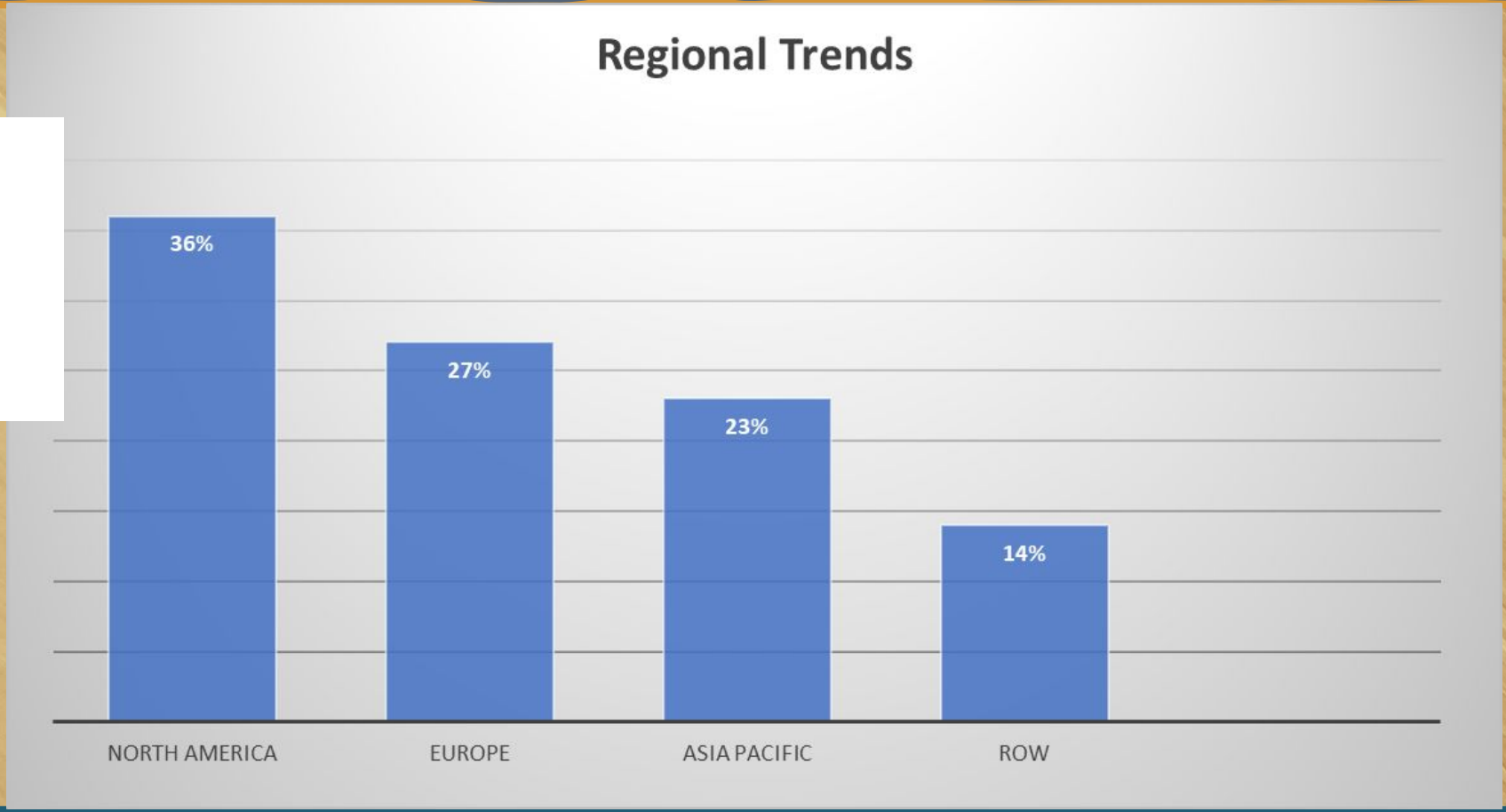
Regional Trends



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WHAT DOES ALL THIS DATA TELL US?

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“I don’t think anyone knows whether we’re going to have a recession or not — and if we do, whether it’s going to be a deep one or not,”

Fed Chair Jerome H. Powell said at a news conference last month. “It’s not knowable.”

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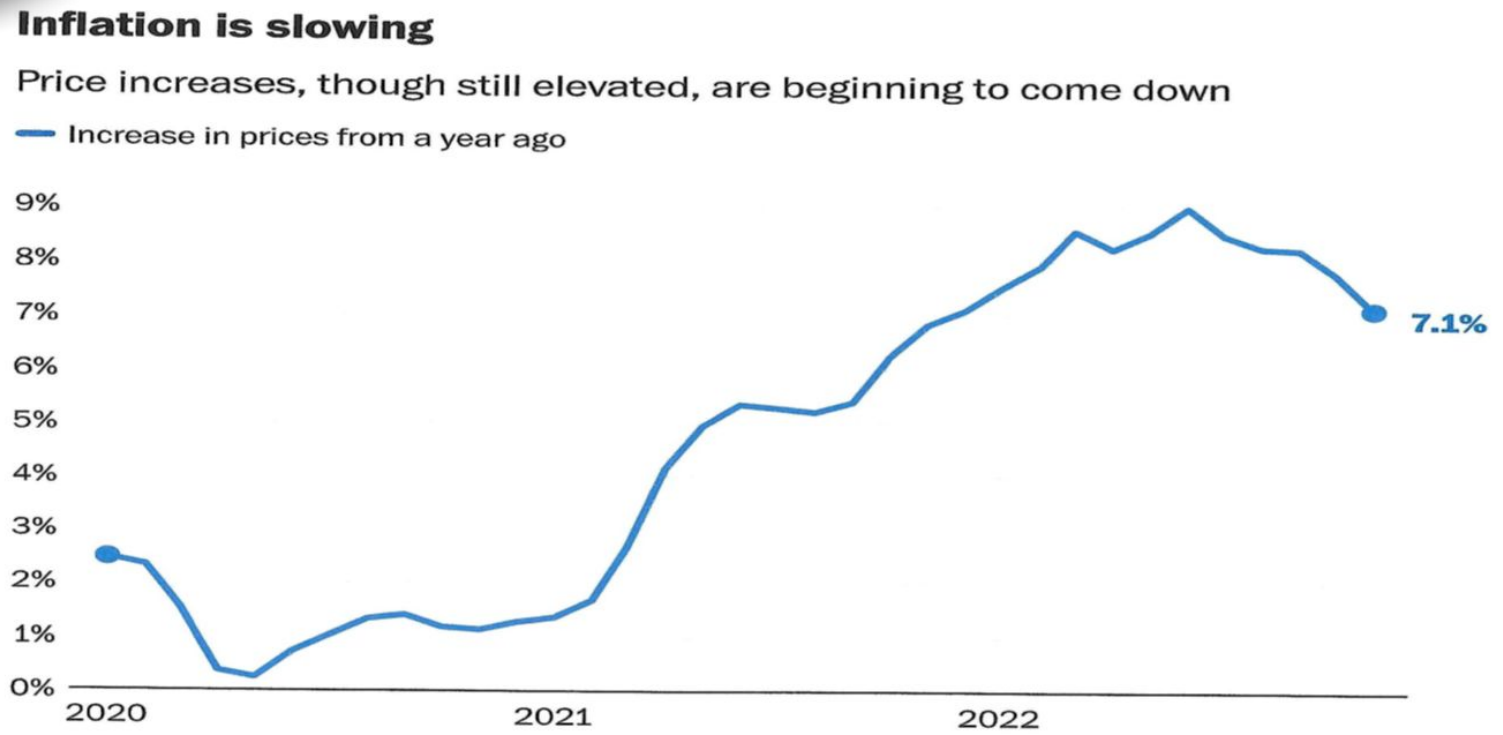

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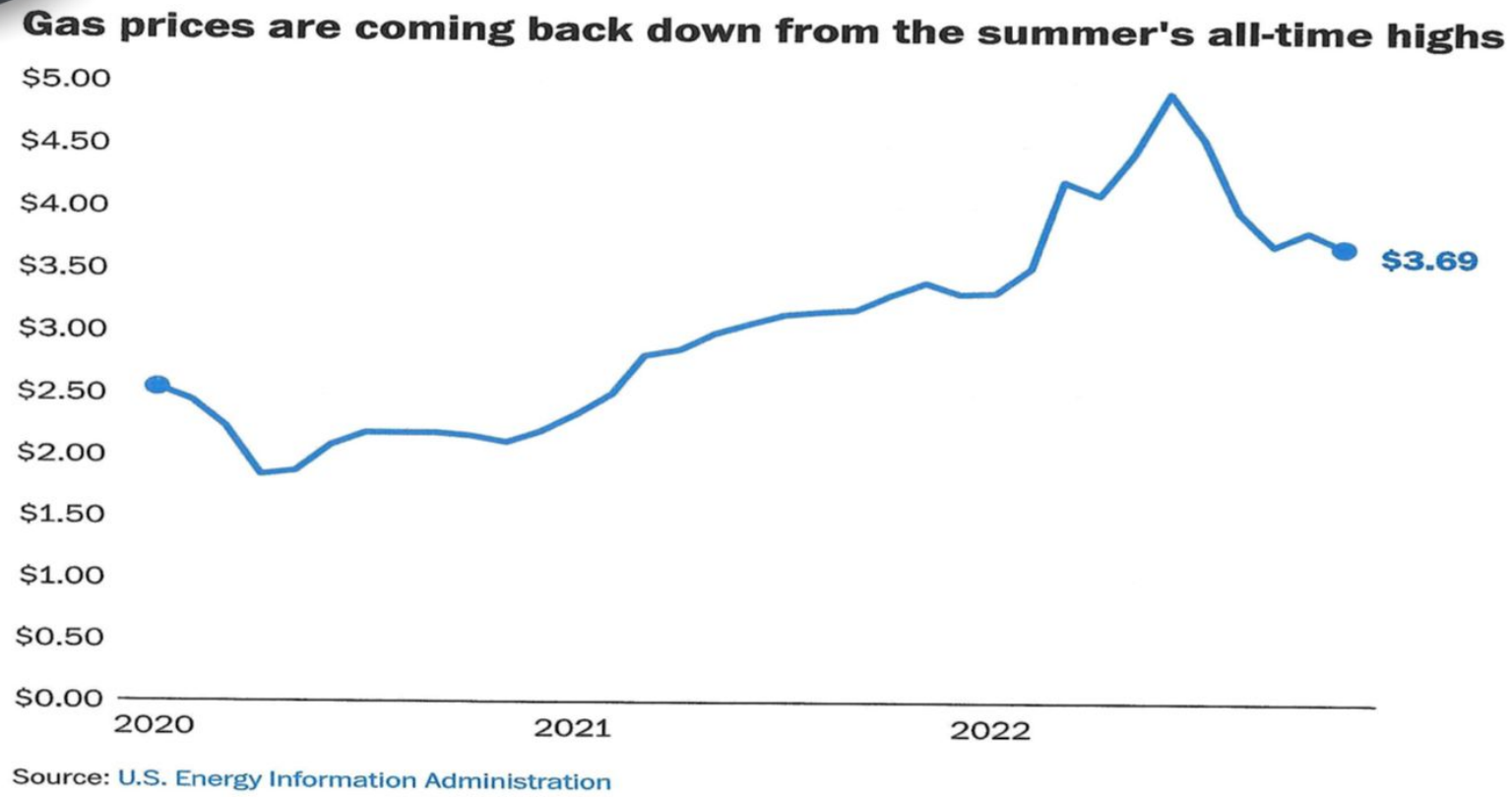

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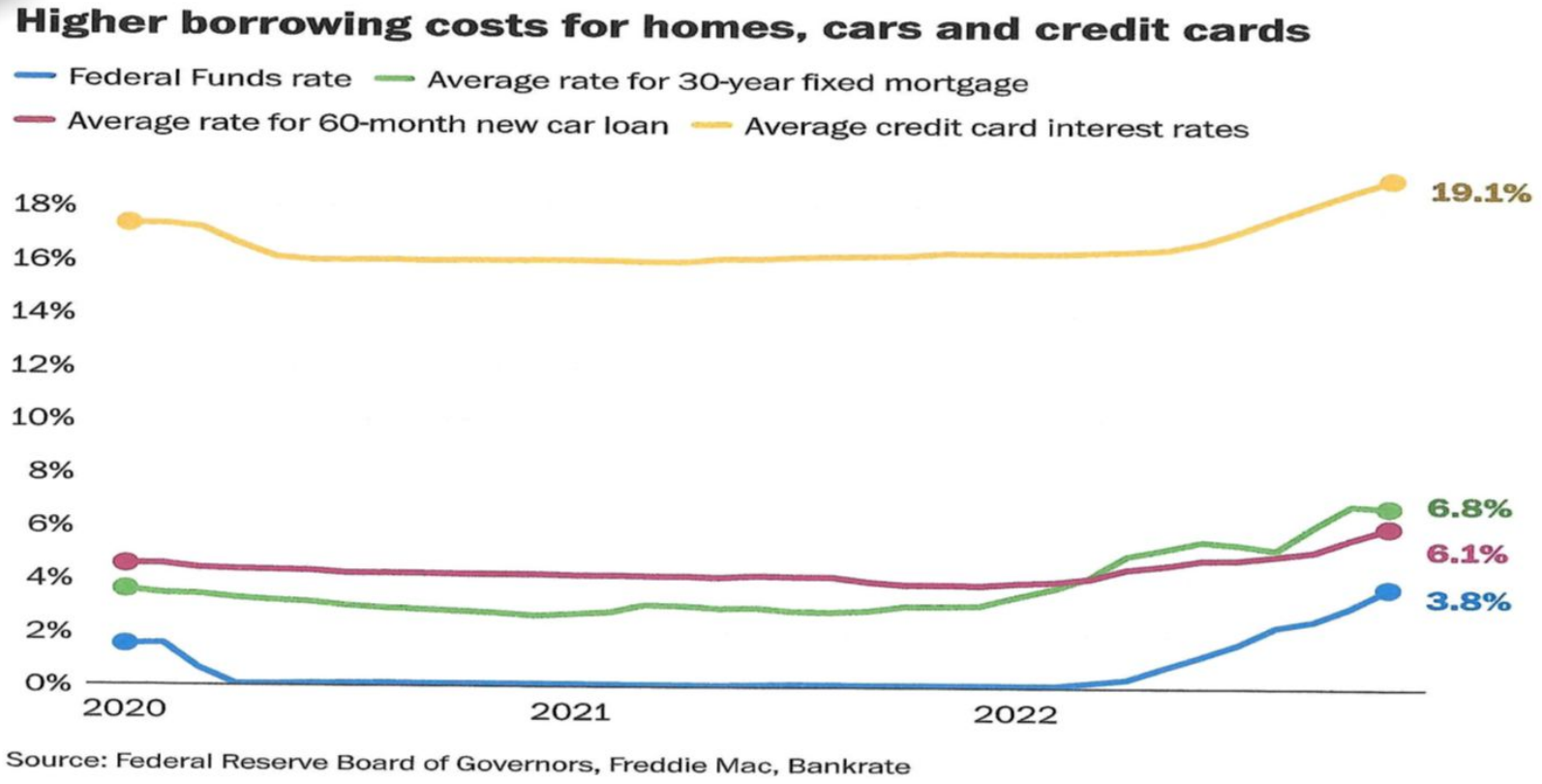

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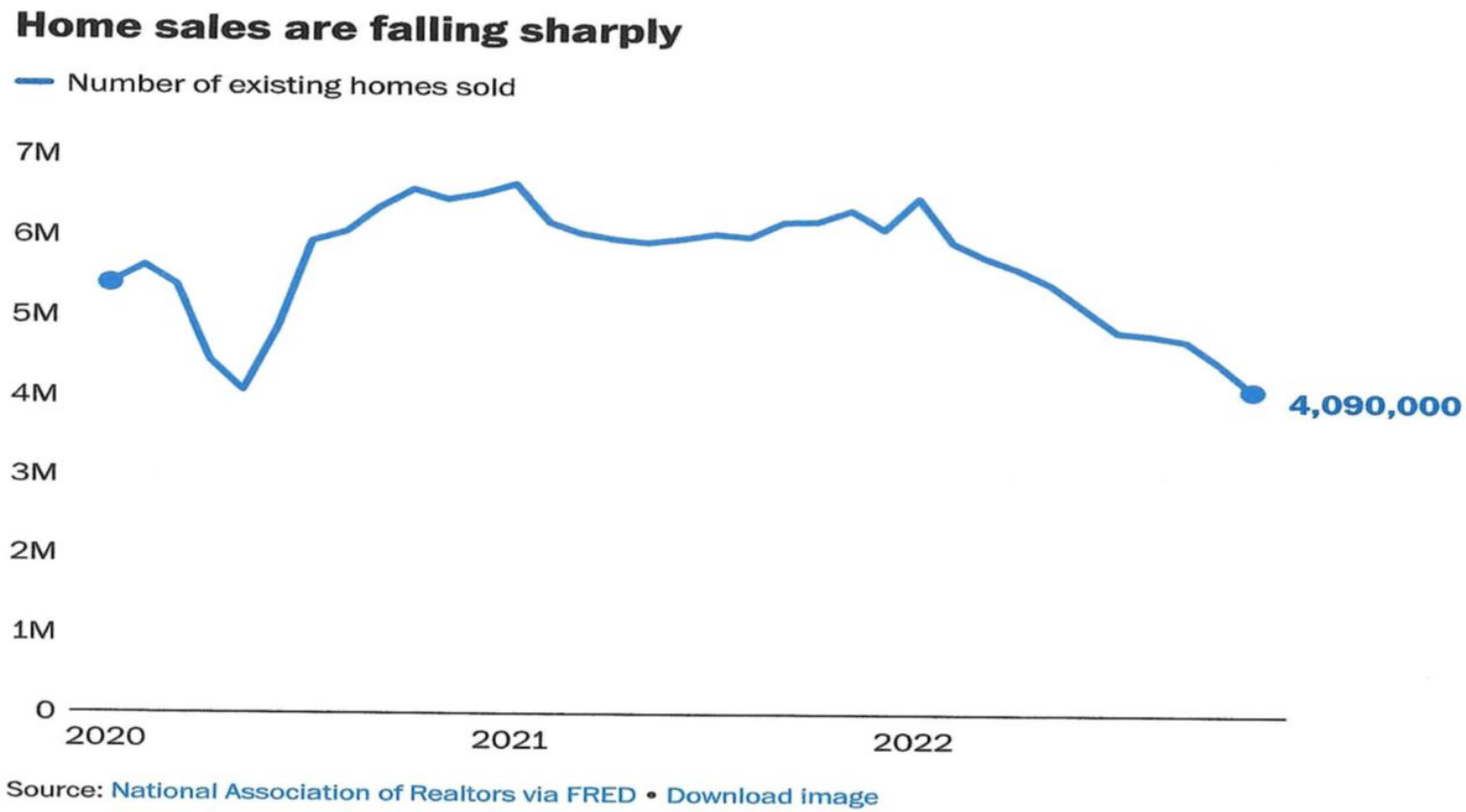

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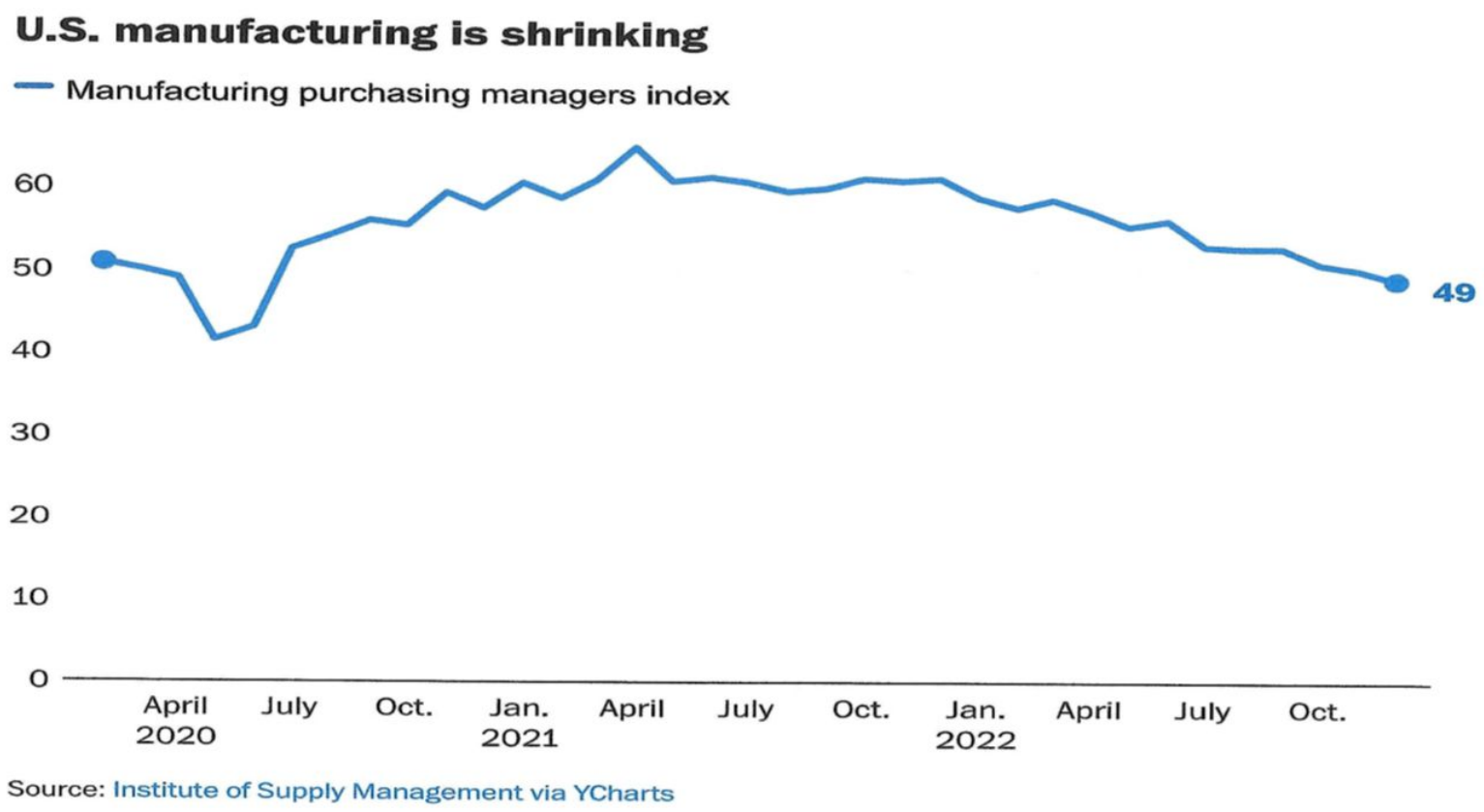

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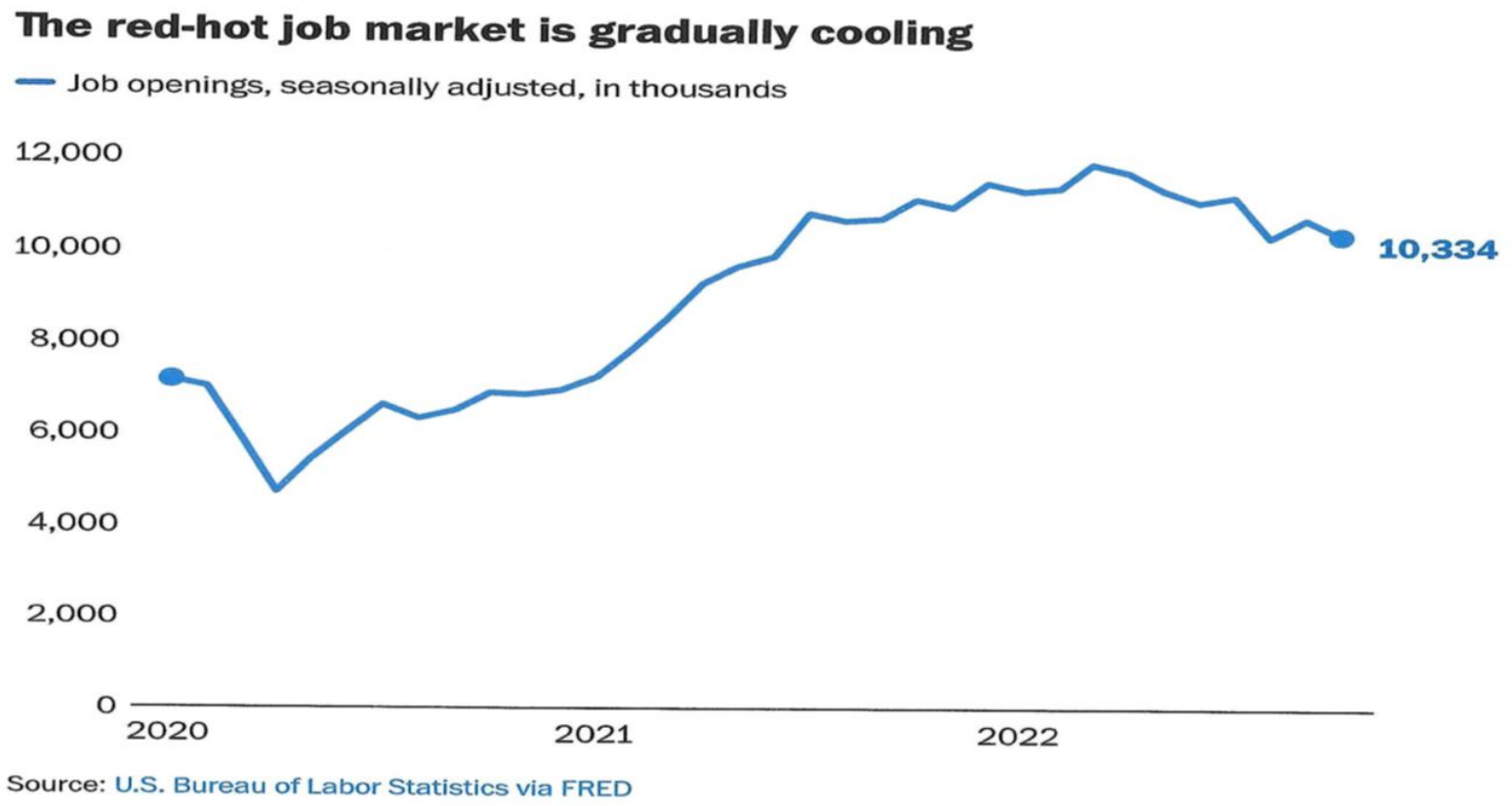

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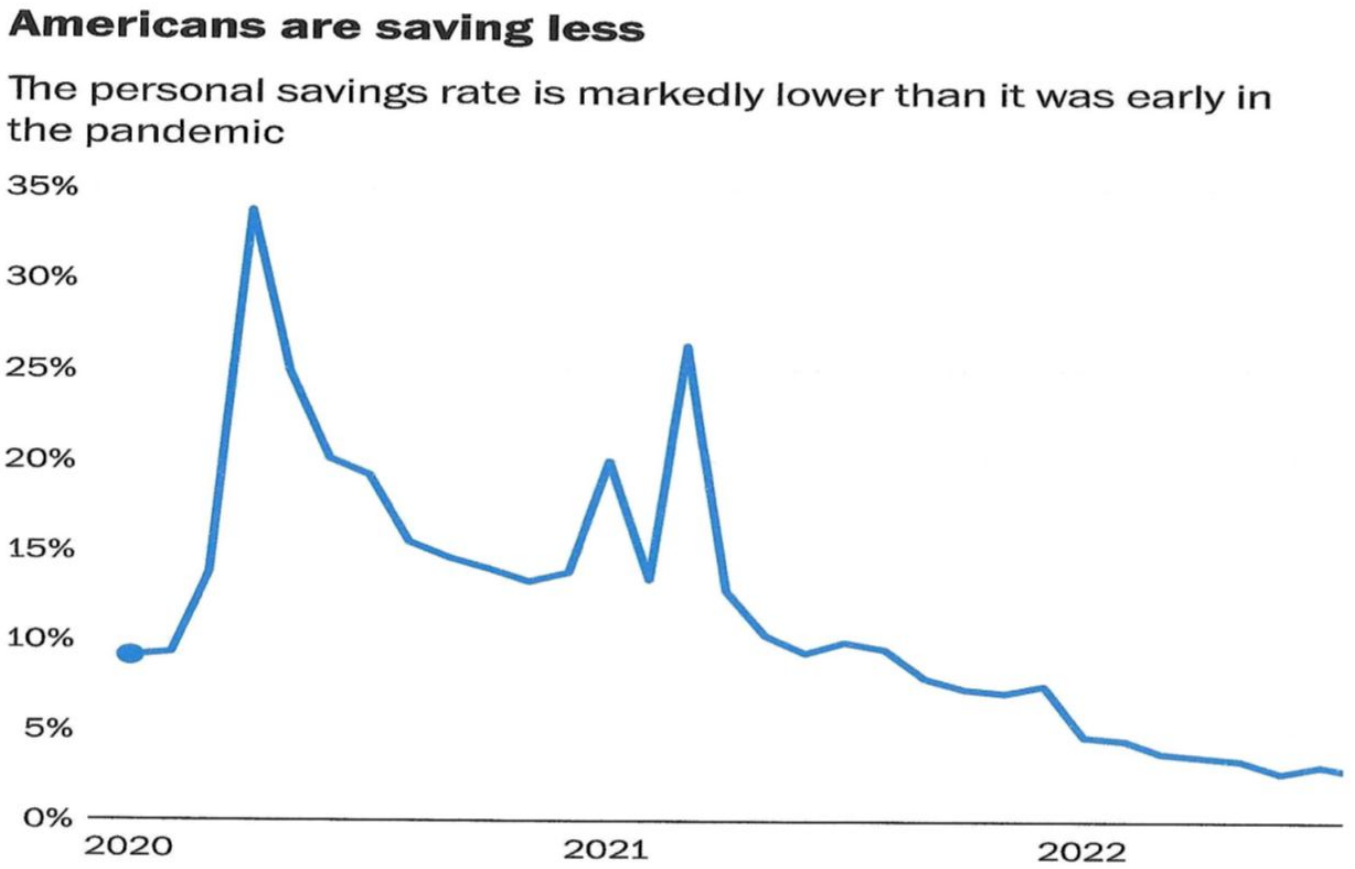

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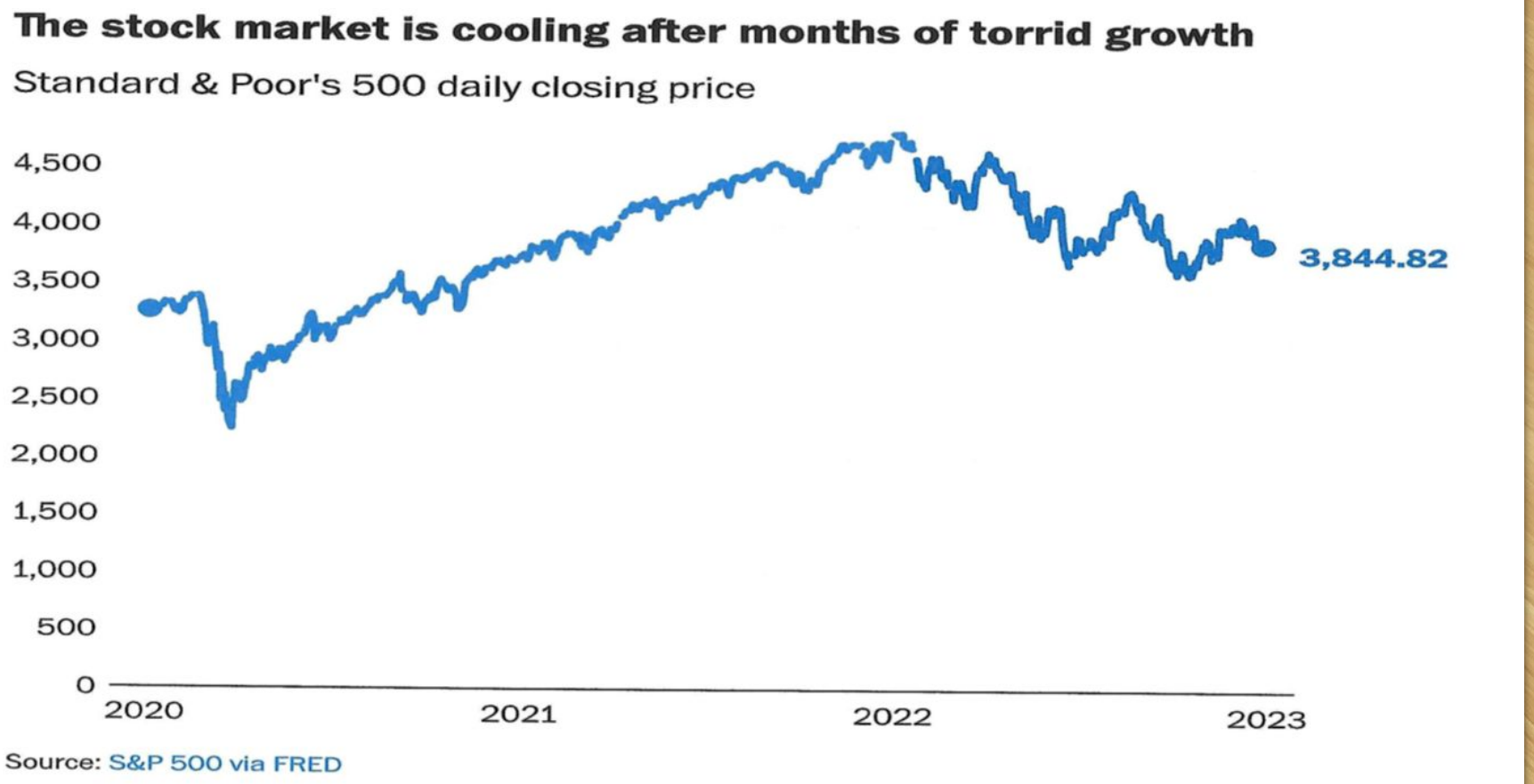

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Recession Forecasting

Major banks are divided on 2023 recession calls

BANK	2023 RECESSION FORECAST	NOTES
J.P. Morgan	Mild recession beginning late in the year.	Bank economists expect U.S. economic growth to slow.
Goldman Sachs	U.S. will "narrowly avoid" a recession.	There is a 35 percent chance of a U.S. downturn in 2023, bank economists say.
Bank of America	Mild recession likely beginning in the first half of the year.	An economic downturn is "all but inevitable" in the United States and Europe, the bank says in a recent report.
Morgan Stanley	No recession.	Bank economists expect that the U.S. "just skirts" a downturn, though the labor market is likely to take a hit.
Barclays	"Shallow" recession beginning in the spring.	The bank recently pushed back its forecast by one quarter, and now expects a downturn starting in the second quarter.

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