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Economic Heartbeat of the Fence Industry for 2023

with

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Economic Heartbeat of The Fence Industry for 2023

What is your Prediction



Economic Heartbeat of the Fence Industry for 2023

**INFLATION
2022**



**RECESSION
2023**





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Economic Heartbeat of the Fence Industry for 2023

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



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Trends Driving Demands

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



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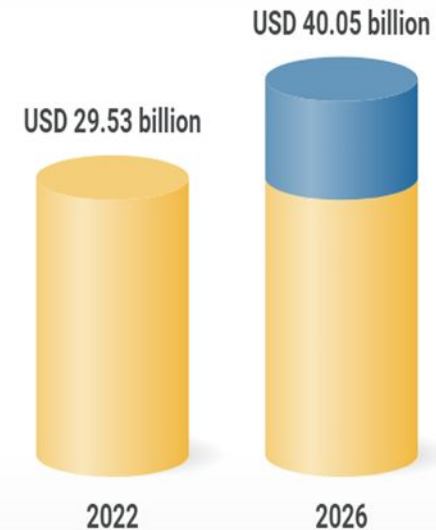
Global Fencing Market

- 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

Global Fencing Market

Market forecast to grow at CAGR of 7.93%



<https://www.researchandmarkets.com/reports/5648774>

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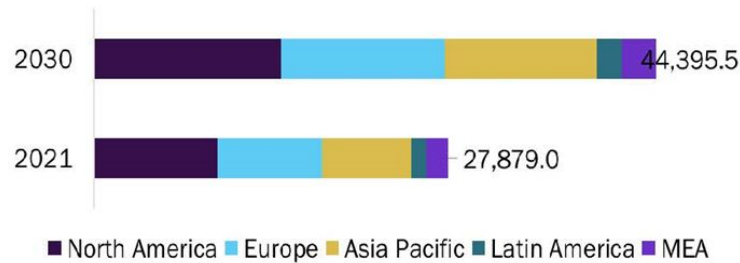
Global Market Report Countries Covered

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

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North America was the largest region in 2021 market

Regional Segmentation Analysis
Market opportunity by region (USD Million)



Market Opportunities**



- North America
- Europe
- Asia Pacific
- Latin America
- MEA

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%

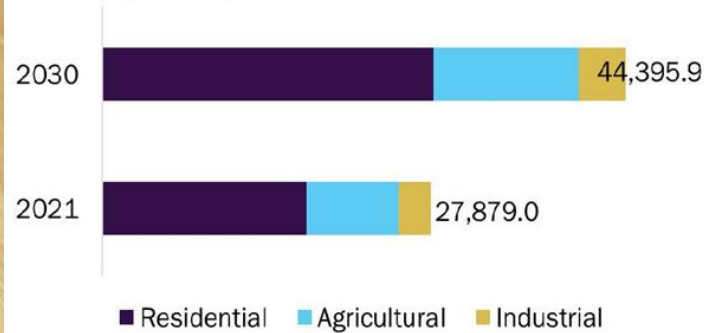


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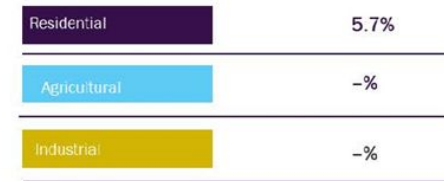
Market Opportunities

Application Segmentation Analysis

Market opportunity by application



CAGR% (2022-2030)



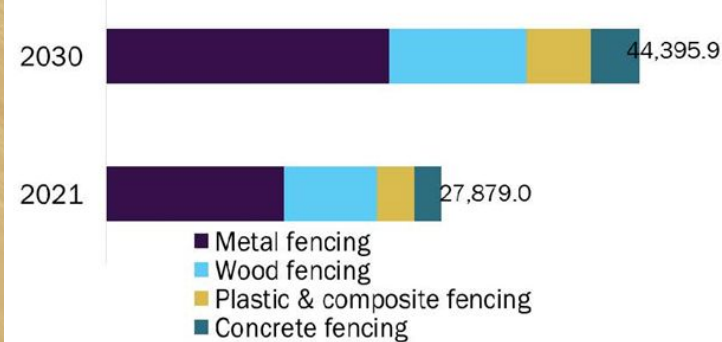
Market Opportunities*



■ Residential ■ Agricultural ■ Industrial

Material Segmentation Analysis

Market opportunity by material



CAGR% (2022-2030)



Market Opportunities*



■ Metal fencing ■ Wood fencing ■ Plastic & composite fencing ■ Concrete fencing

*Market opportunity equates to Incremental growth in value ($\Delta=Y2030-Y2022$)

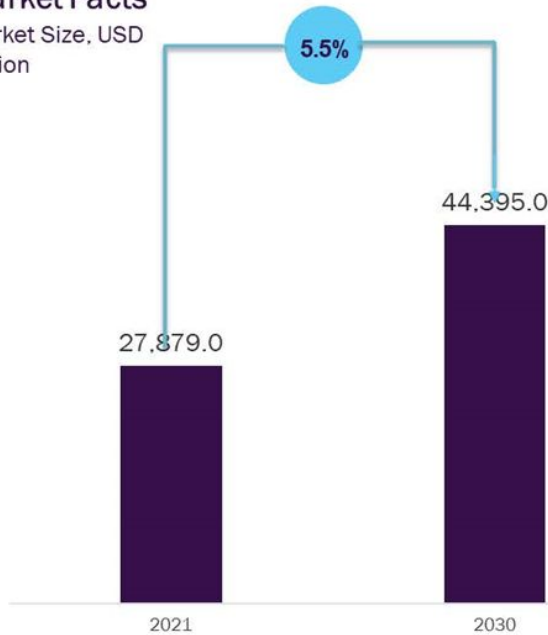


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Market Outlook

Market Facts

Market Size, USD Million



Market Growth Stage

Medium

Low | Medium | High | Exponential

Pace of Market Growth

ACCELERATING

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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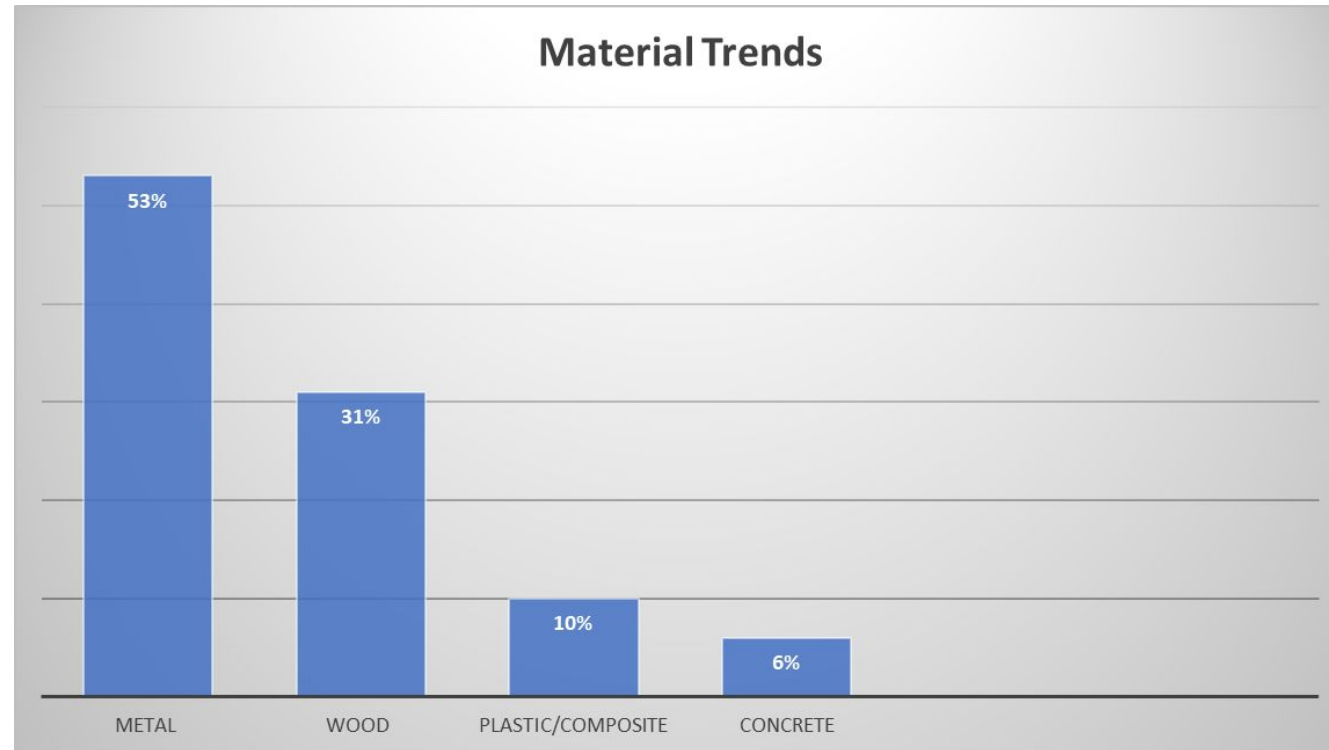
Material Trends

- 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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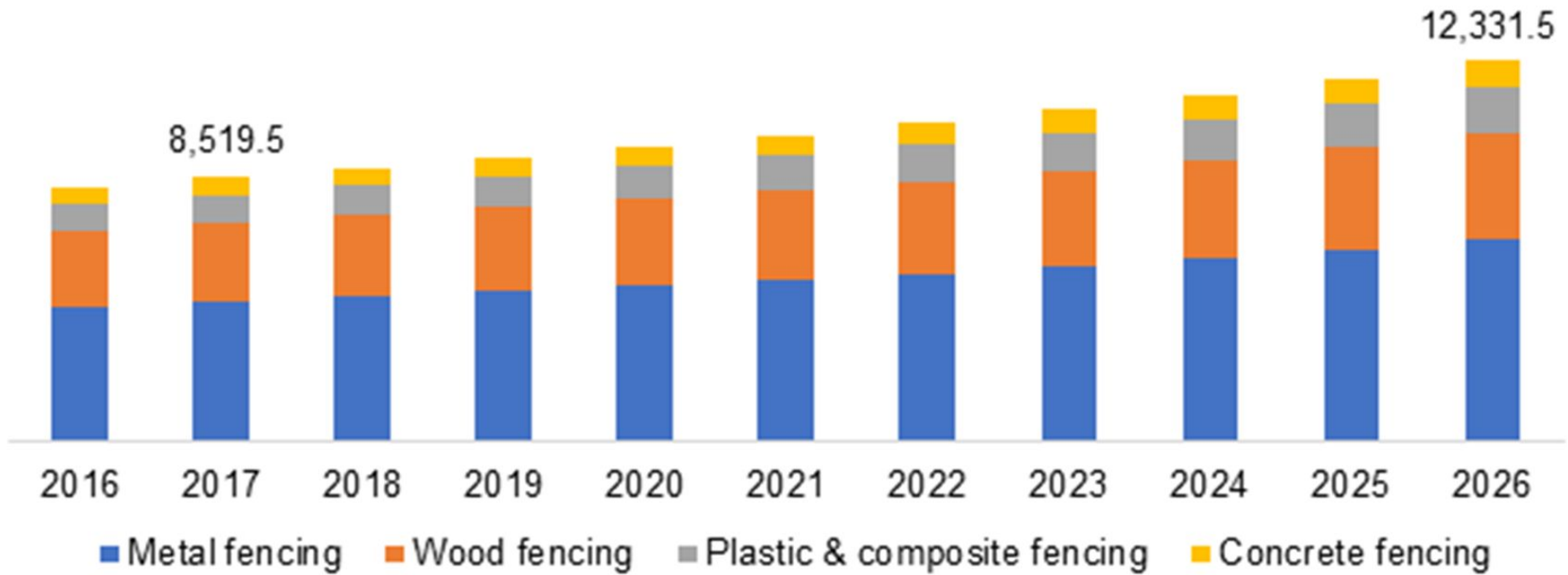
Material Trends





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North America Fencing Market, by Material, 2016 - 2026 (USD Million)





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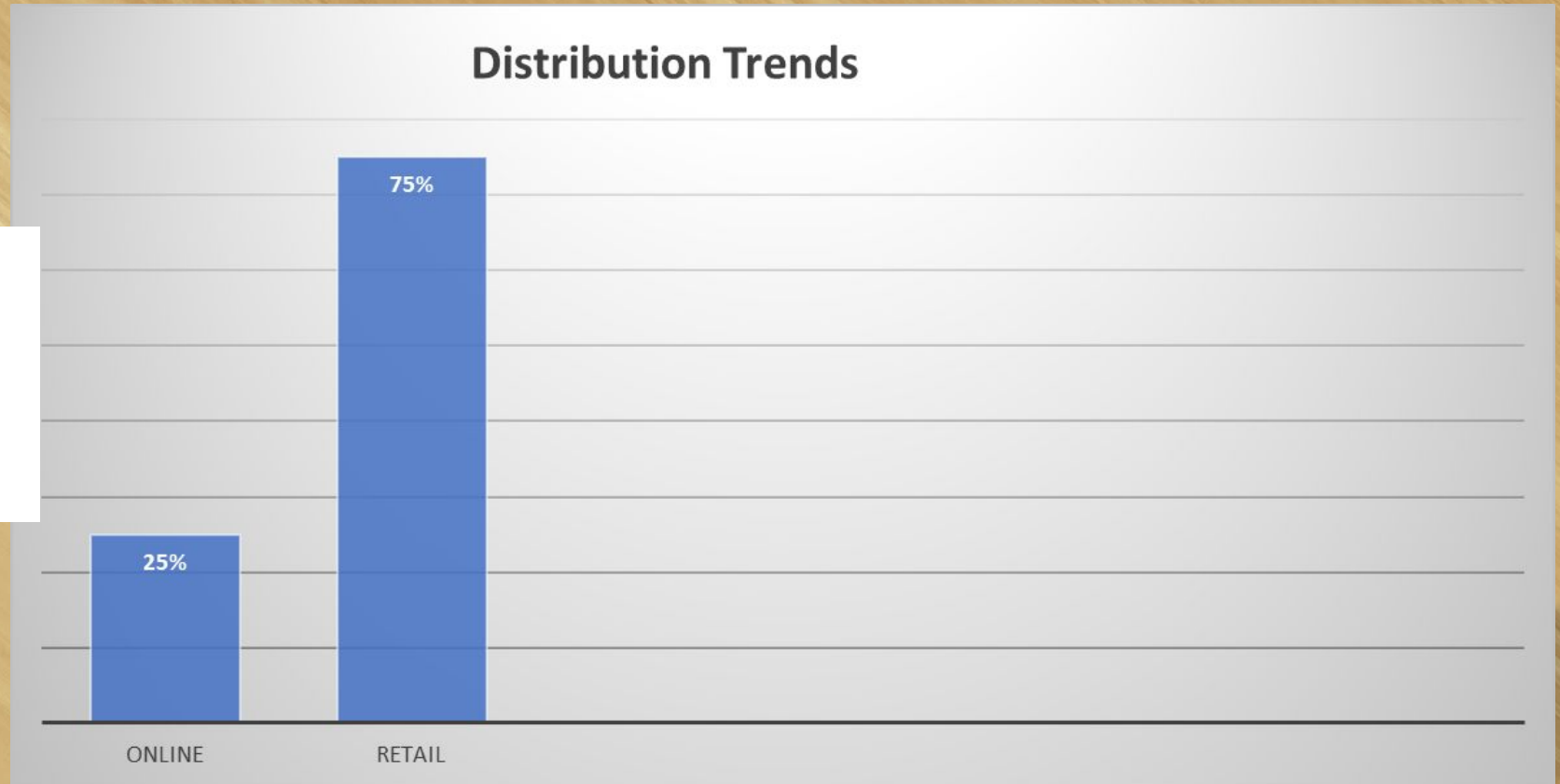
Distribution Trends

- ❖ *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

Installation Trends





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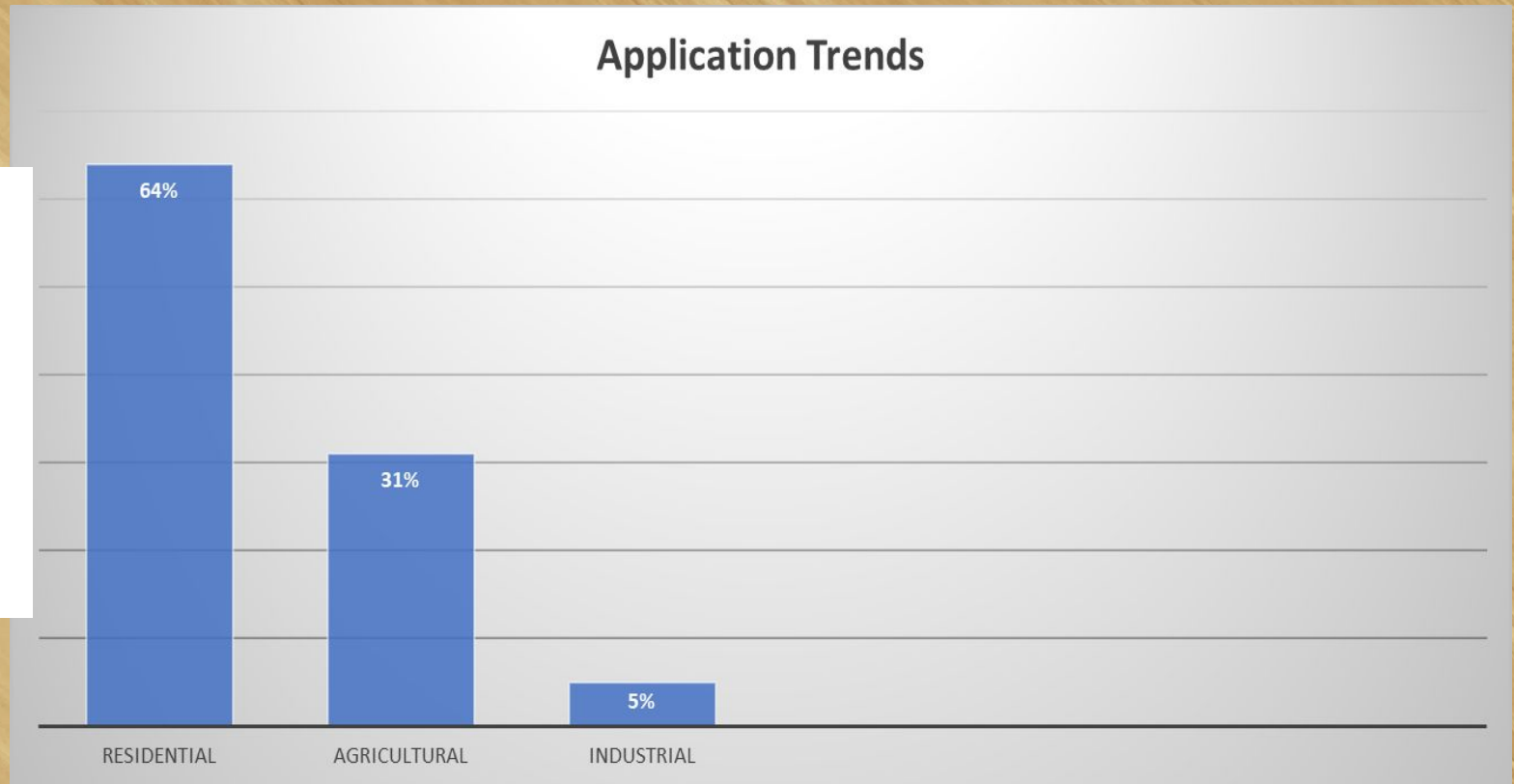
Application Trends

- ◆ 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

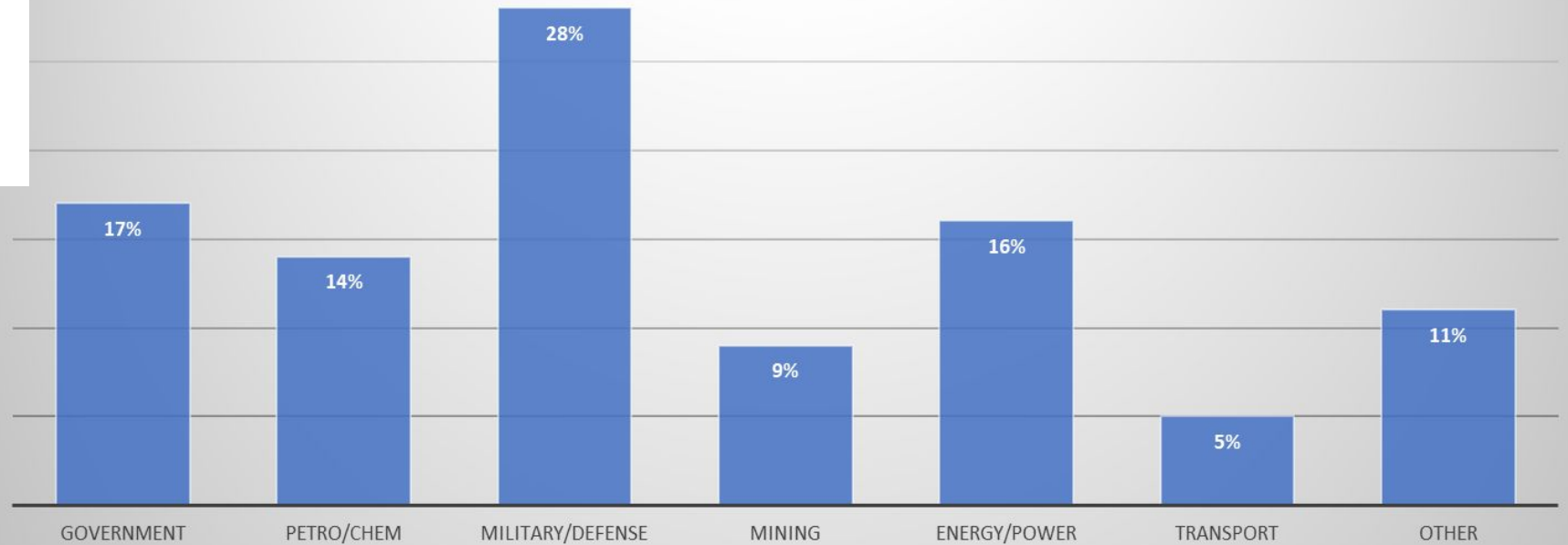
- ✓ The global fencing market is segmented
- ✓ Government
- ✓ Petroleum & Chemicals
- ✓ Military & Defense
- ✓ Mining
- ✓ Energy & Power (expected to register the highest CAGR of %5.2)
- ✓ Transport



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Industrial Trends

Industrial Trends





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Regional Trends

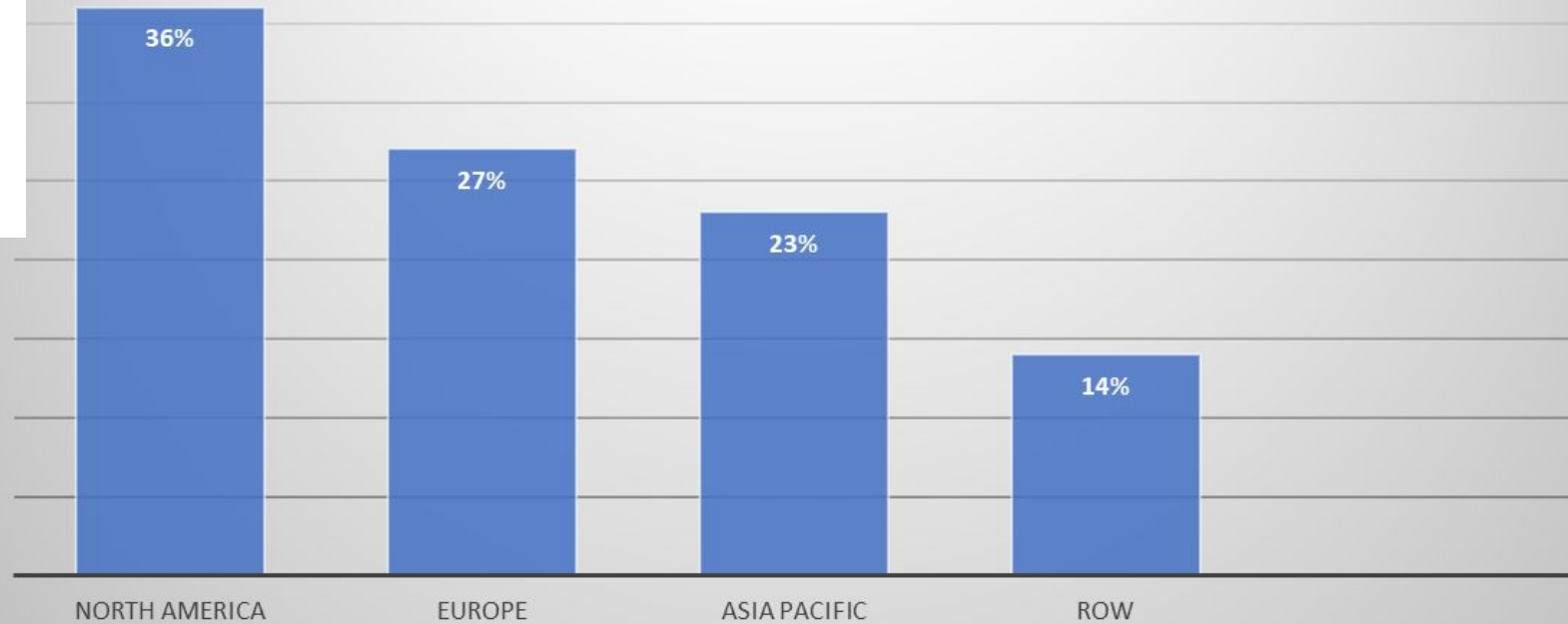
- ◆ North America led the fencing market and continuous expansion in construction activities allows the region to dominate the worldwide market.
- ◆ More than 50,000 fence contractors work in the U. S. alone. These contractors supply materials and provide services all over the world.
- ◆ The regional 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

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."

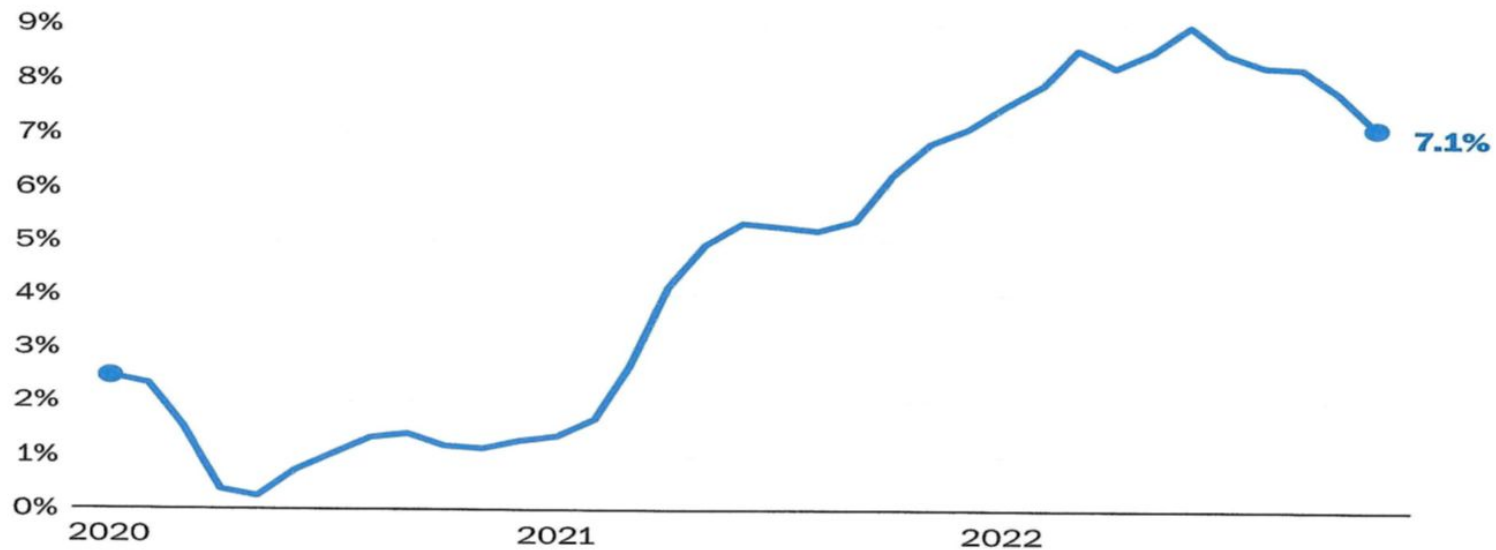


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Inflation is slowing

Price increases, though still elevated, are beginning to come down

— Increase in prices from a year ago

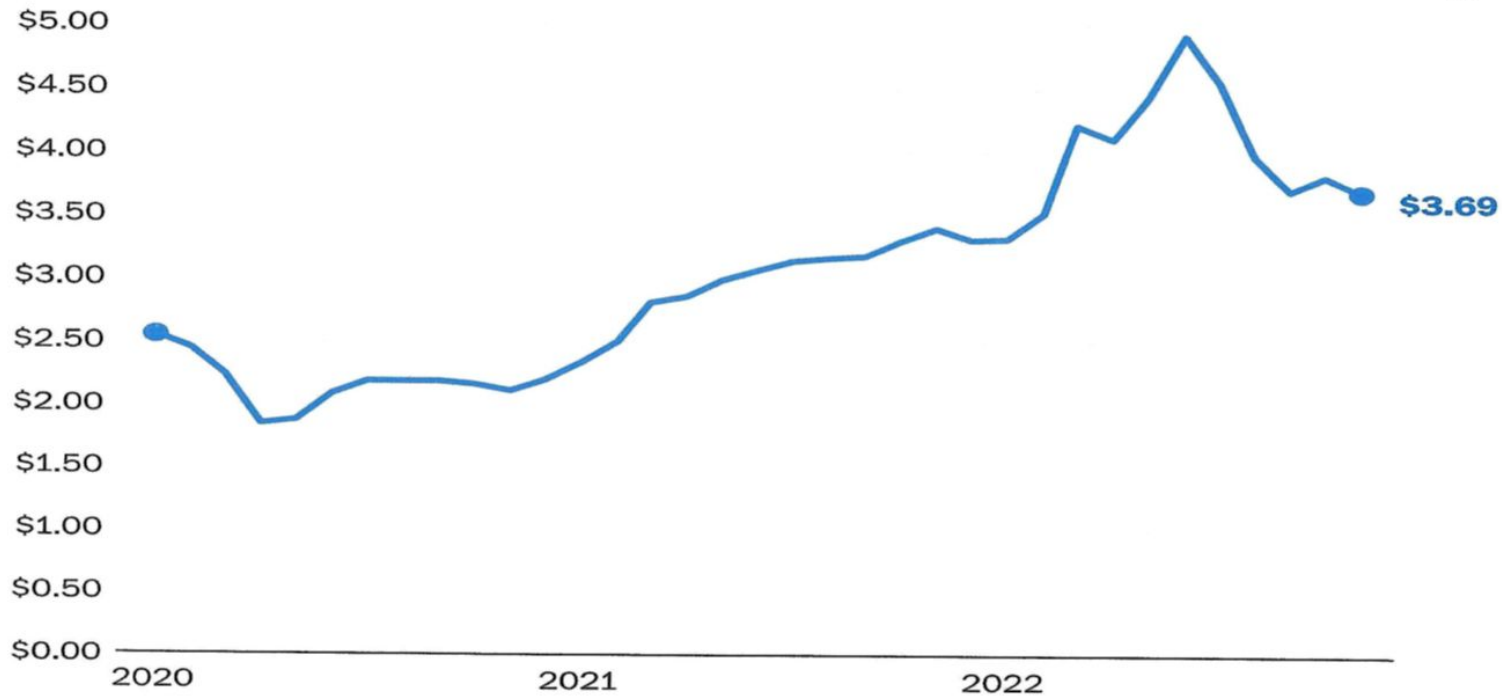


Source: Consumer Price Index, U.S. Bureau of Labor Statistics



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Gas prices are coming back down from the summer's all-time highs

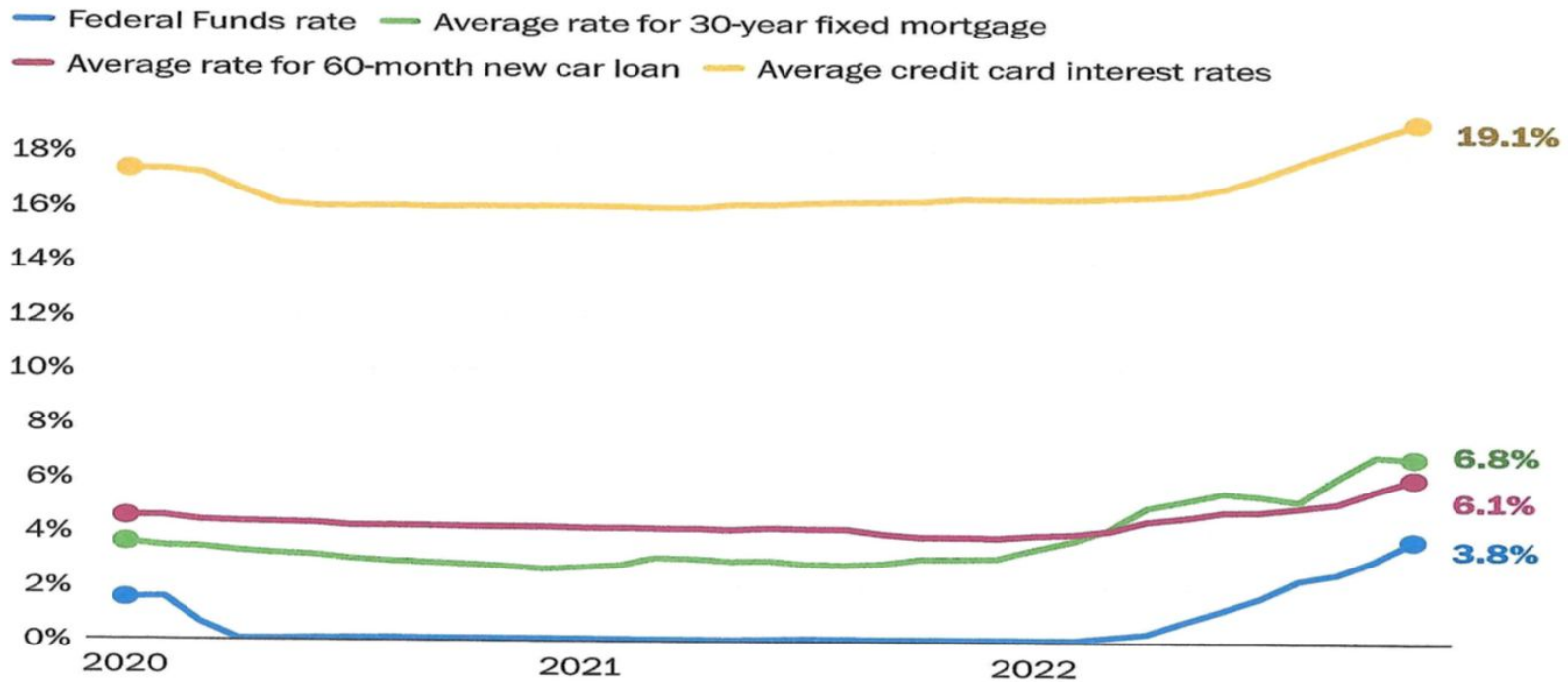


Source: U.S. Energy Information Administration



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Higher borrowing costs for homes, cars and credit cards

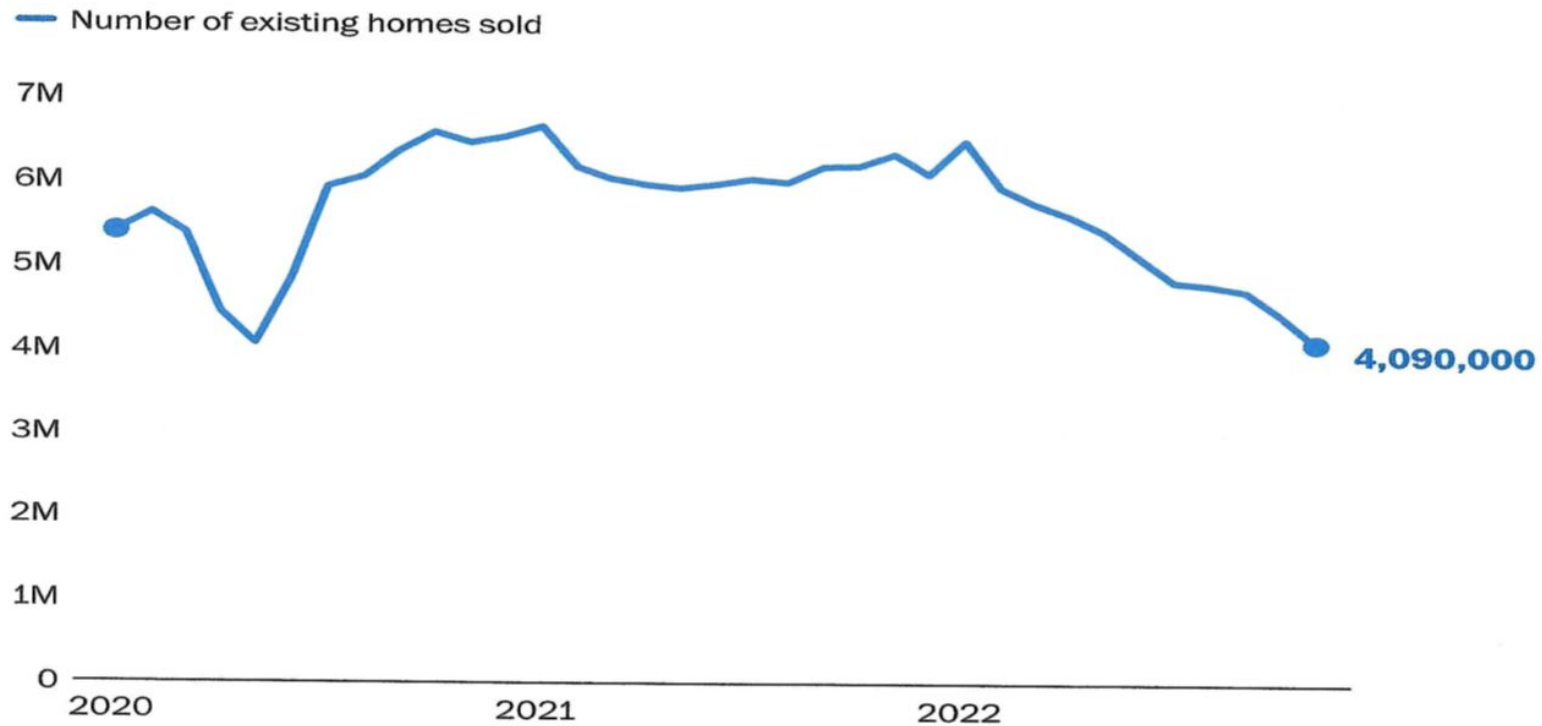


Source: Federal Reserve Board of Governors, Freddie Mac, Bankrate



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Home sales are falling sharply



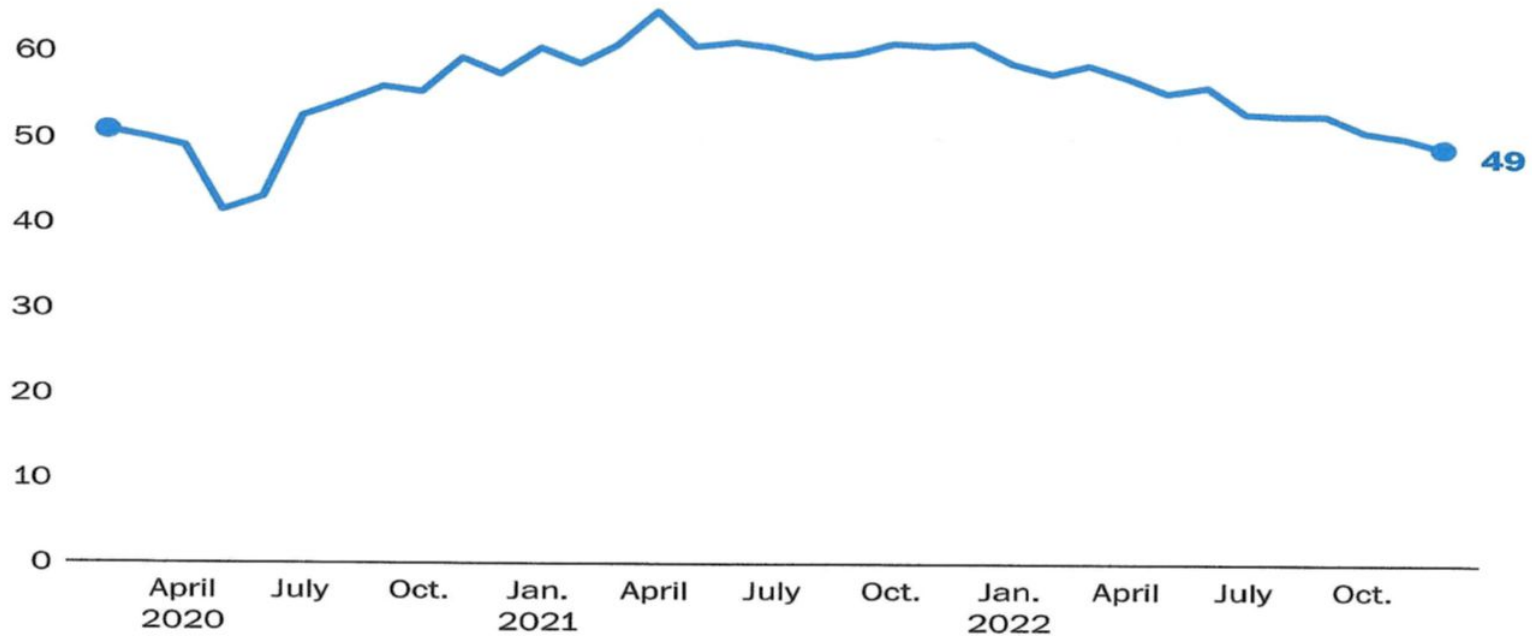
Source: National Association of Realtors via FRED • [Download image](#)



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U.S. manufacturing is shrinking

— Manufacturing purchasing managers index



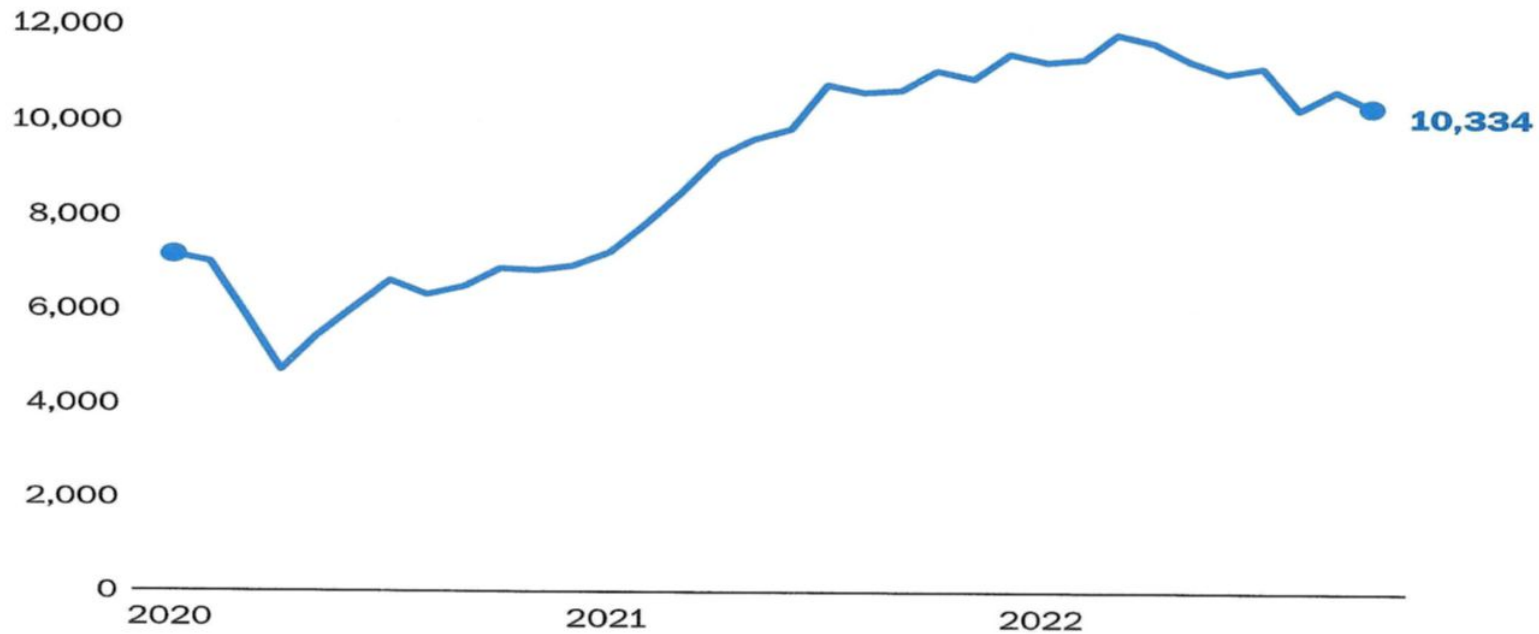
Source: Institute of Supply Management via YCharts



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The red-hot job market is gradually cooling

— Job openings, seasonally adjusted, in thousands



Source: U.S. Bureau of Labor Statistics via FRED

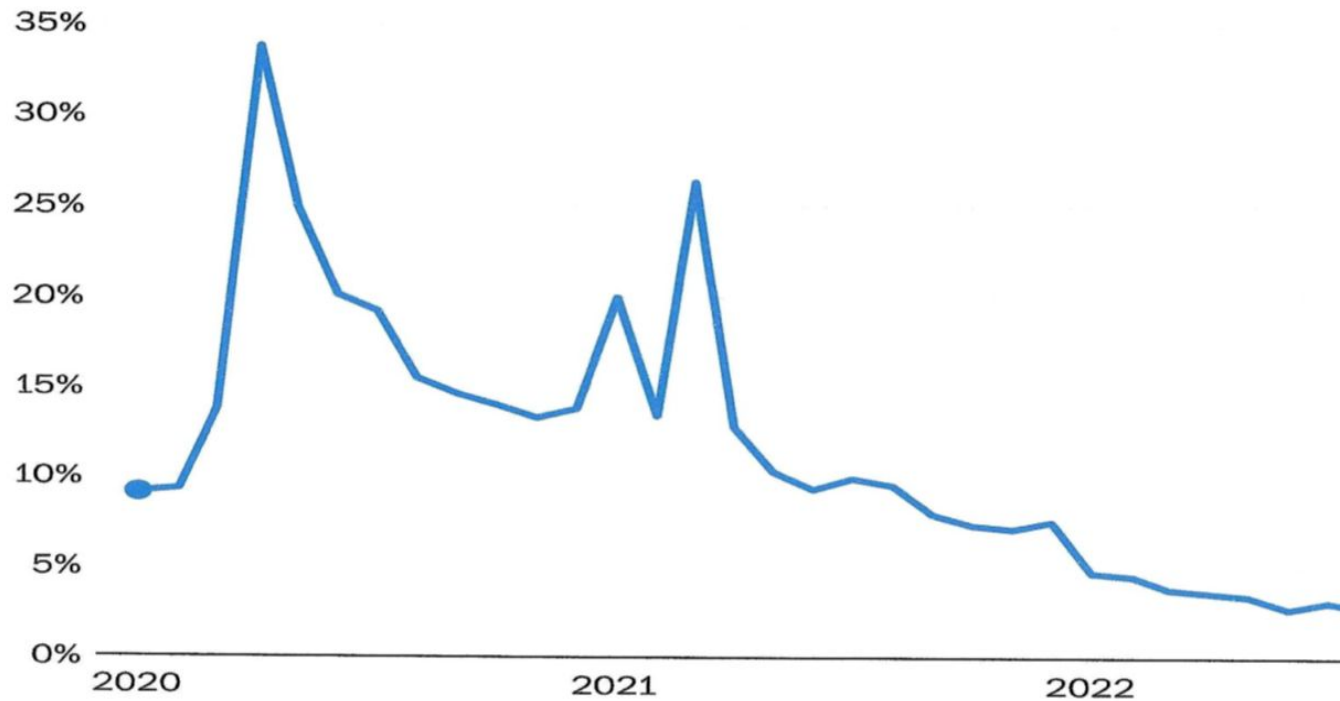




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Americans are saving less

The personal savings rate is markedly lower than it was early in the pandemic

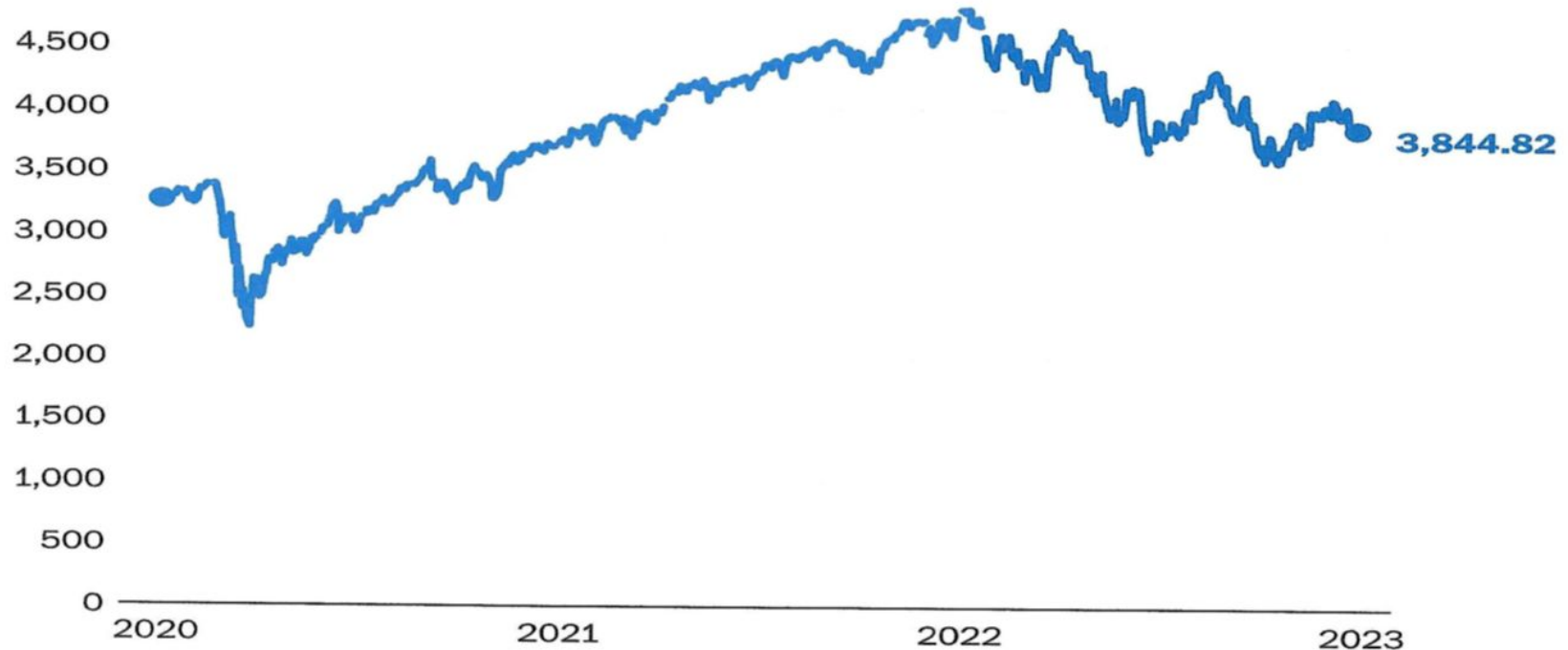




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The stock market is cooling after months of torrid growth

Standard & Poor's 500 daily closing price



Source: S&P 500 via FRED



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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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CONCLUSION



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