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Fencing

Industry Study with Forecasts for **2016 & 2021**

Study #2921 | July 2012 | $5100 | 322 pages

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Fencing

Industry Study with Forecasts for ***2016 & 2021***

Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

PRODUCTS

MARKETS

REGIONS

INDUSTRY STRUCTURE

COMPANY PROFILES

(continued on following page)

Fencing

Industry Study with Forecasts for ***2016 & 2021***

Table of Contents

COMPANY PROFILES

(continued from previous page)

List of Tables/Charts

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

PRODUCTS

MARKETS

REGIONS

INDUSTRY STRUCTURE

Fencing

Industry Study with Forecasts for ***2016 & 2021***

Metal accounted for the largest share of the US fencing market in both dollar value and linear feet in 2011, though plastic and composite materials will post the fastest gains through 2016.

Demand to rise more than 7% yearly through 2016

US demand for fencing is forecast to rise 7.1 percent per annum to $8.3 billion in 2016, totaling 835 million linear feet. Growth will be driven by an expected rebound in building construction from a depressed 2011 base. Gains will also be supported by growing installation of high-value fences, such as ornamental metal and composite fencing. Consumers are turning to these materials based on their aesthetic and performance advantages.

Plastic & composite materials to see fastest gains

Among fencing materials, plastic and composite is forecast to exhibit the most rapid growth in demand through 2016. Plastic and composite fencing materials often resemble natural wood but have minimal maintenance needs and have longer lifespans than wood fencing. Plastic and composite fencing products are also seen as being "green" because they are often made from recycled materials, such as reclaimed plastics and wood scraps.

In 2011, metal fencing accounted for the largest share of the fencing market in both dollar value and linear feet. Chain link fencing is often utilized to mark boundaries and secure properties, while ornamental metal fencing is erected around houses and businesses to form an aesthetically pleasing barrier. Demand for metal fencing will increase in line with the industry average through 2016. High-value ornamental fencing will spur dollar gains. In addition to the rebound in housing activity, some business owners will opt for ornamental fencing to serve as an aesthetically pleasing alternative to chain link or wire fencing.

Wood fencing demand will increase at a below average pace through 2016. Wood is mostly used in the residential market because of its low cost and favorable aesthetics. However, demand for wood fencing will face competition from plastic and composite fencing, which require less maintenance than wood.

Residential building market to remain dominant

In 2011, residential buildings accounted for nearly one-half of demand, making it the largest market for fencing. Demand for fencing in residential building construction applications is forecast to rise at an above average pace through 2016, fueled by a rebound in housing completions. Further growth will be supported by the large residential replacement segment, which will benefit from a recovery in improvement and repair spending.

Nonresidential fencing demand will post strong gains through 2016. Increasing nonresidential building construction -- particularly in the office and commercial segment -- will drive demand. Fences are often installed around nonresidential structures to provide security barriers and to demarcate property lines.

Fencing

Industry Study with Forecasts for ***2016 & 2021***

Sample Text, Table & Chart

MARKETS

Residential

The residential market accounted for 46 percent of fenc
in terms of length in 2011. This is a smaller share of the mar
historical average, indicative of the low level of residential b
struction activity in 2011. Demand for fencing in the residen
is forecast to advance
2016. Growth will be
more homes are const
lines and improve the
structed. The improv
as improving econom
to engage in home imp
replacement of fences.

SAMPLE TEXT

However, residential fencing demand in 2016 will remain below that of 2006. Many newly built homes will be smaller than those previously constructed and located on smaller-sized lots, in an effort to make them more affordable to potential home buyers. Thus, these homes will require less fencing to demarcate property boundaries. Moreover, many homeowners suffered a severe erosion in their property values as a result of the 2007-2009 recession. Home equity loans are one of the key ways in which home improvement projects are financed. Because of this decline in home values, many homeowners will be unable to take out the necessary loans for such projects as the installation and replacement of fences. This will negatively affect fencing demand in the improvement and repair market going forward.

In 2011, wood fencing accounted for 48 percent of the r
market by length. Despite its higher maintenance requireme
fencing will remain the leading fencing material by length th
However, wood fencing's share of residential demand is exp
decline because of competition from plastic, composite, and

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TABLE III-1

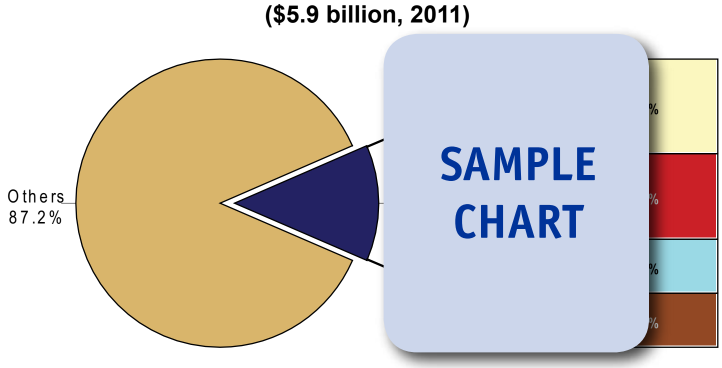
FENCING DEMAND VALUE BY MATERIAL
(million dollars)

Item	2001	2006	2011	2016	2021
Construction Expenditures (bil $)					
$ fencing/000$ construction					
Fencing Demand					
Metal					
Wood					
Plastic & Composite					
Concrete					
Other					
$/linear foot					
Fencing Demand (mil linear ft)					
Addendum:					
Gate & Accessory Demand (mil $)					

SAMPLE TABLE

CHART VI-1

US FENCING MARKET SHARE
($5.9 billion, 2011)



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Sample Profile, Table & Forecast

TABLE V-8

SOUTH FENCING DEMAND BY SUBREGION & MARKET (million dollars)

Item	2001	2006	2011	2016	2021
South Construction (bil 2005$)					
linear feet fencing/000$ construction					
South Fencing Demand (mil ln ft)					
$/linear foot					
South Fencing Demand					
By Subregion:					
South Atlantic					
East South Central					
West South Central					
By Market:					
Residential					
Nonresidential Building					
Nonbuilding					
Agricultural					
% South					
Fencing Demand					

SAMPLE TABLE

COMPANY PROFILES

Builders Fence Company Incorporated
11040 Randall Street
Sun Valley, CA 91352
818-768-5500
http://www.bu

Annual Sales
Employment:

Key Products ... distribution of chain link fen

SAMPLE PROFILE

Builders Fence Company (BFC) is engaged in the production and sale of ornamental iron fencing, gates and security products for the residential, commercial and industrial markets. The privately held company also distributes chain link fencing, vinyl fencing, tools, accessories, and other products. BFC operates facilities in Los Angeles, Fontana, Sacramento, and San Diego, California; and Tacoma, Washington.

The Company participates in the US fencing industry primarily through the manufacture and marketing of ornamental iron fencing and gates. BFC's ornamental iron fencing is sold in six main styles: Regal, Aristocrat, Guardian, Modern, Empire, and Napoleon. Each style offers models for light, heavy, and extra-heavy duty residential and commercial uses. Moreover, iron fencing from the Company is available with custom design options for residential applications.

Finish options for BFC ornamental iron fencing include GALVA-GUARD I, GALVA-GUARD II, GALVA-GUARD III, and BFC POLY PRO +. All GALVA-GUARD finishes are used in corrosive environments. The Company's GALVA-GUARD I paint finish comprises galvanized tubing power washed for paint preparation, then coated with

263

"Demand for fencing in the nonbuilding construction market is expected to advance 3.6 percent per year to $290 million in 2016. Growth will be spurred by the increase in transportation and utility construction expenditures. As the region's population increases, more roads and utility connections will need to be built. Fences will often be installed to enhance site security and to improve the safety of roadways. However, the region's increasing population will boost interest in the use of sound barriers, ..."
--Section V, pg. 215

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Other Studies

Green Building Materials

US green building materials demand is forecast to increase 11 percent annually to $86.6 billion in 2017. Permeable pavement and structural products (e.g., recycled concrete, FSC-certified lumber) will grow the fastest. Exterior products such as energy-efficient windows and green roofing will remain the largest segment. This study analyzes the $51.8 billion US green building material industry, with forecasts for 2017 and 2022 by product, market and US region. The study also considers market environment factors and profiles industry participants.

#2995 .... February 2013 .... $5100

Wood & Competitive Decking

US demand for decking is forecast to rise 2.4 percent annually through 2016 to 3.3 billion lineal feet, valued at $5.7 billion. Wood-plastic composite and plastic lumber decking materials will grow at double-digit rates, far outpacing the dominant wood segment. The residential building market will lead gains. This study analyzes the 2.9 billion lineal foot US wood and competitive decking industry, with forecasts for 2016 and 2021 by material type, market, application and US region. The study also evaluates company market share and profiles industry competitors.

#2959 .... October 2012 .... $5300

World Drywall & Building Plaster

Worldwide sales of drywall will rise 8.6 percent annually through 2016 to 10.7 billion square meters, with China and the US claiming most new demand. The residential market will outpace its nonresidential counterpart. Global building plaster demand will rise 5.8 percent annually to 37.4 million metric tons in 2016. This study analyzes the world drywall and building plaster industry, with forecasts for 2016 and 2021 by product, market, world region and for 23 major countries. The study also evaluates company market share and profiles industry participants.

#2924 .... August 2012 .... $6100

World Roofing

World demand for roofing materials is forecast to grow 3.8 percent annually through 2016 to 11.7 billion square meters. The US and China will jointly account for nearly 60 percent of global gains in roofing volume demand. The dominant bituminous products segment will post the fastest growth. This study analyzes the 9.7 billion square meter world roofing industry, with forecasts for 2016 and 2021 by product, market, world region and major country. The study also evaluates company market share and profiles industry participants.

#2896 .... June 2012 .... $6300

Wood-Plastic Composite & Plastic Lumber

US demand for wood-plastic composite and plastic lumber is projected to advance 13.2 percent annually to $5.4 billion in 2015. Decking will remain the largest application and grow the fastest, followed by the molding and trim and windows and doors segments. Wood-plastic composite lumber will outpace plastic types. This study analyzes the $2.9 billion US wood-plastic composite and plastic lumber industry, with forecasts for 2015 and 2020 by material, application and market. The study also evaluates company market share and profiles industry players.

#2836 .... January 2012 .... $5100

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