

Fencing

US Industry Study with Forecasts for 2020 & 2025

Study #3453 | September 2016 | \$5300



Growth in fencing will be driven by rising building construction expenditures. The increased adoption of high value fencing materials such as ornamental metal and plastic and composite lumber will further boost demand. These materials have the ability to improve the appearance and value of the properties where they are installed, which will lead more consumers to select them.

Residential fencing benefits from home improvement

The residential building market accounts for the largest share of fencing demand, and is expected to outpace all other markets through 2020. Gains will be driven by sustained strong growth in housing completions. Rising residential improvement and repair spending will further drive fencing demand growth. As consumer confidence continues to grow, more homeowners are expected to undertake home improvement projects, including the addition of new fences and the repair of existing fences to improve the appearance and value of their properties.

Metal fencing retains largest share of market

Metal fencing accounts for the largest share of fencing demand in terms of both value and linear feet. Ornamental metal fencing is expected to grow at the fastest pace of all metal materials because an increasing number of

consumers believe that it enhances the exterior appearance and value of properties. However, chain link fencing will continue to be the largest category of metal fencing demand due to its low cost and durability.

Plastic & composite fencing to register rapid growth

Demand for wood fencing is expected to remain above that of plastic and composite fencing through the forecast period, primarily due to its lower cost. The plastic and composite fencing segment is expected to register the most rapid rate of growth in both value and length through 2020, driven by the popularity of these materials. Plastics and composites have longer lifespans, are less susceptible to damage caused by the elements, and offer long-term color consistency.

Study coverage

This study analyzes the US fencing market. It presents historical demand data (2005, 2010, 2015) plus forecasts (2020, 2025) by product (metal, wood, concrete, plastic and composite, gates and accessories, other materials), market (residential, nonresidential buildings, nonbuilding, agricultural) and region of the US. In addition, the study assesses key market environment factors, examines the industry structure, and evaluates company market share.

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New England
Middle Atlantic

Midwest

East North Central
West North Central

South

South Atlantic
East South Central
West South Central

West

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Plastic & Composite Fencing

Demand for plastic and composite fencing grew 5.9 percent per year between 2010 and 2015, spurred by increasing consumer recognition of the performance and aesthetic properties of these materials. Though plastic and composite fencing often has a higher initial cost than wood fencing, these materials are capable of lasting longer and are resistant to degradation caused by insect attack or exposure to the elements. Additionally, while wood fencing must be periodically painted or stained to maintain its appearance, plastic and composite lumber fencing usually retains its original appearance once installed.

Plastic and composite lumber demand in terms of length is forecast to rise to 1.2 billion linear feet in 2020. Growth in residential construction activity, particularly in the residential market, will drive a rise in residential fencing installation of plastic and composite materials. This is due to the same cause of their performance and market share from wood fencing and will also offer consumers who perceive chain link fencing to be a material that does not enhance the appearance value of their properties may instead specify plastic or composite fencing which can be made to resemble natural wood.

In value terms, plastic and composite fencing is forecast to advance 7.6 percent annually through 2020 to \$765 million. Rising sales in linear feet will drive gains. Further advances will be boosted by efforts of manufacturers to offer more aesthetically pleasing products. For instance, BUFFTECH PVC fencing from CertainTeed is available in styles that

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TABLE IV-6

RESIDENTIAL IMPROVEMENT & REPAIR FENCING DEMAND BY MATERIAL (million dollars)

Item	2005	2010	2015	2020	2025
Res Improvement & Repair (bil 2009\$) linear feet fence/000\$ construction					
Res I&R Fencing (mil linear ft) \$/linear foot					
Residential Improvement & Repair Fencing					
Metal					
Wood					
Plastic & Composite					
Concrete & Other					
% improvement & repair Residential Fencing Demand					

Source: The Freedonia Group

TABLE III-4

METAL FENCING DEMAND BY TYPE (million dollars)

Item	2005	2010	2015	2020	2025
Metal Fencing Demand					
Chain Link:					
Metal-Coated					
Polymer-Coated					
Ornamental					
Wire					
Other					

Source: The Freedonia Group

This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

Related Studies

Residential Roofing

US demand for residential roofing is forecast to rise 4.4 percent per year to 147 million squares in 2020, valued at \$10.4 billion. Homeowners will respond to improved lending conditions and engage in previously delayed reroofing projects. Asphalt will remain the top roofing material, while metal roofing and roofing tiles will post the fastest gains. This study details the 121 million square US market for roofing, giving forecasts for 2020 and 2025 by type, market, US region, and distribution channel. The study also reviews industry structure and evaluates company market share.

#3436..... August 2016 \$4900

Residential Windows & Doors

US demand for residential windows and doors is projected to grow 6.0 percent per year through 2020 to \$25.6 billion. Among material types, plastic will post the most rapid growth, though wood will continue to account for the largest share of the US market. This study presents historical demand data plus forecasts for 2020 and 2025 by product, material, market and US region. In addition, the study analyzes market environment factors, assesses the industry structure, evaluates company market share, and profiles US industry competitors.

#3427..... July 2016 \$4900

World Prefabricated Housing

Global demand for prefabricated housing will rise 2.7 percent annually through 2019 to 3.4 million units. Gains will be driven by the Asia/Pacific and Africa/Mideast regions and by Central and South America, based on advances in overall housing activity as well as increasing market penetration of prefabricated housing. This study analyzes the 2.9 million unit world prefabricated housing industry, with forecasts for 2019 and 2024 by type for six world regions and 20 major countries. The study also evaluates company market share and profiles industry participants.

#3375..... February 2016 \$6200

Siding

US siding demand is forecast to rise 5.6 percent annually to 100 million squares in 2019, valued at \$10.7 billion. Gains will be driven by a rebound in housing completions and an acceleration in the residential replacement market. Vinyl siding will remain the largest category by volume, but will lose market share to stucco and fiber cement siding. This study analyzes the 76.2 million square US siding industry, with forecasts for 2019 and 2024 by material, market and region. The study also evaluates company market share and profiles industry participants.

#3374..... January 2016 \$5500

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Freedonia's methods

- Establishing consistent economic & market forecasts
- Using input/output ratios, flow charts & other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts & end users
- Researching a proprietary database that includes trade publications, government reports & corporate literature

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