



US Fencing Services Market

Sector Brief Review



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US Fencing Services Market M&A Overview

- Fencing market witnessed a dip in deal activity in H1 2024 likely due to macroeconomic headwinds, such as increased material costs, supply chain disruptions, policy & trade retaliation and deal-making caution
- Despite the 2024 dip, the YTD 2025 volume suggests M&A remains a key growth strategy in fencing services, particularly among private equity and strategic buyers
- Recent transactions in the market include:
 - **Perimeter Solutions Group, LLC's** acquisition of **Strategic Fence and Wall** backed by **Bertram Capital**
 - **Fenceworks** acquisition of **Kanas Fencing, Inc.**
- The Fencing market stood at **~US\$ 32.9 Bn** in **2025** and is expected to grow at a CAGR of **5.4%** to reach **~US\$ 42.8 Bn** by **2032**

Key Trends Shaping Fencing Market M&A

Increasing emphasis on privacy, home aesthetics, and safety is boosting M&A interest in fencing and outdoor improvement

Growing demand for bamboo, bio composites, and natural fencing solutions is prompting strategic acquisitions in sustainable product lines

Acquirers are targeting firms with innovative designs and smart fencing tech to capture younger, affluent demographics

Both PE firms and corporates are actively acquiring fencing suppliers and services businesses to capitalize on the construction rebound and real estate growth

The shift toward direct-to-consumer (D2C) online sales, alongside strong offline wood fencing demand, is influencing acquisition targets with hybrid sales models

US Fencing Services Market – Key Trends



Urban Development & Infrastructure Spending

Government infrastructure projects and suburban expansion are driving demand for perimeter fencing in public and commercial spaces



Customization & Aesthetics

Consumers are prioritizing design, colors, and decorative features, fueling demand for customizable fencing solutions



Increase in outsourcing of fencing services

Builders and homeowners are shifting towards third-party providers for faster, cost-efficient solutions



Growing residential renovation demand

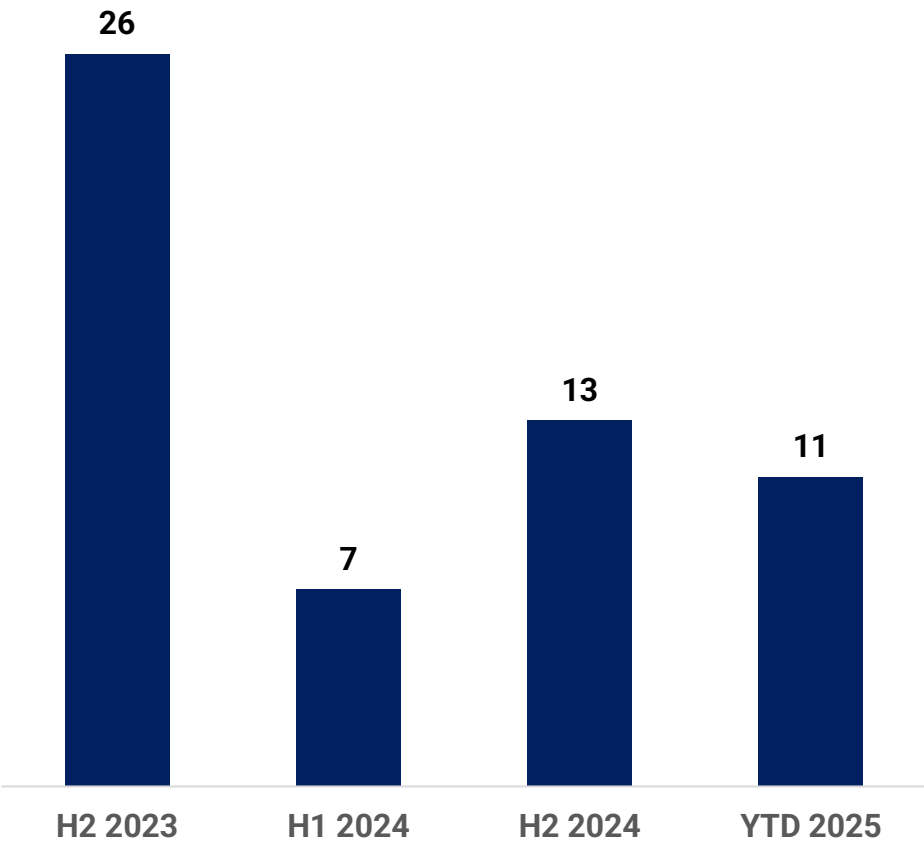
Fencing demand is rising due to increased home improvement and new housing starts



Shift Toward Low-Maintenance Materials

Rising preference for vinyl, composite, and metal fencing due to durability and lower upkeep compared to wood.

Global Fencing Services Market Deal Volume



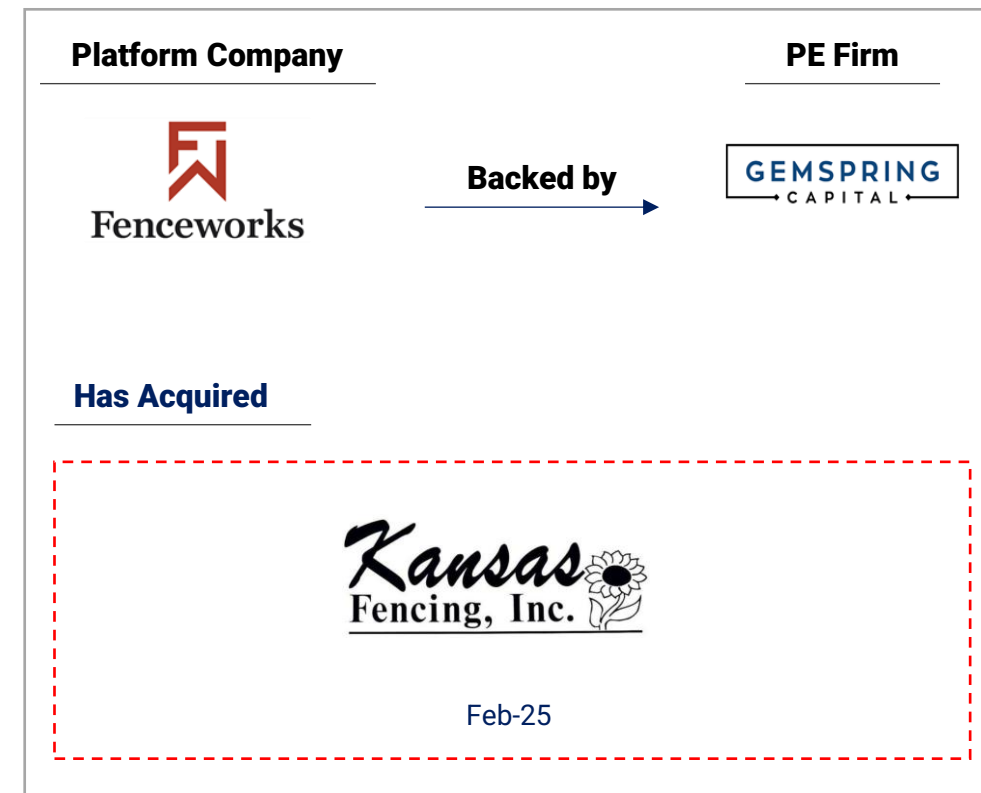
Source: CapitalIQ as of 6th May 2025, Company Press Releases

Active PE Backed Platform Buyers



Platform Overview

Perimeter Solutions Group (PSG) is a Florida-based provider of perimeter security solutions, including commercial fencing and automated access systems. Backed by Bertram Capital since 2024, PSG is expanding through strategic acquisitions



Platform Overview

Fenceworks is a leading California-based fencing installer offering design, prefabrication, and installation services for wood, vinyl, iron, and glass fencing. Backed by Gemspring Capital since 2023, the company is actively pursuing expansion, including its 2025 acquisition of Kansas Fencing

Active PE Backed Platform Buyers (Cont'd)



Platform Overview

Oldcastle is a leading North American manufacturer of fencing, concrete, and building materials serving residential and commercial markets. Its Oldcastle APG division specializes in vinyl, wood, aluminum, and chain-link fencing products




Platform Overview

Fencing Supply Group (FSG) is the largest U.S. distributor of fencing and outdoor living products, with 84 locations across all 50 states. Backed by The Sterling Group, it operates under 15 brands including Merchants Metals and Binford Supply

Active PE Backed Platform Buyers (Cont'd)

Platform Company





Backed by



Has Acquired


Nov-24


Apr-24


Apr-24

Platform Company



Backed by



Has Acquired


Jul-24

Platform Overview

Decks & Docks Lumber Company headquartered in Clearwater, Florida, is a leading specialty distributor of marine construction and outdoor living supplies in the United States. The company offers a comprehensive range of products, including composite decking, treated lumber, fencing, etc.

Platform Overview

Fencing Supply Group (FSG) is the largest U.S. distributor of fencing and outdoor living products, with 84 locations across all 50 states. Backed by The Sterling Group, it operates under 15 brands including Merchants Metals and Binford Supply

Active Private Equity Groups



has acquired



Apr-25



has acquired



Feb-23



has acquired



Jul-24



has acquired



Jan-23



has acquired



Dec-24



has acquired



Jun-24

Active Private Equity Groups (Cont'd)



has acquired



has acquired



has acquired



Selected M&A Transactions

Marquee M&A Deals

Date	Target	Acquiror(s) / Investor(s)	Stake %	Target Business Description
Apr-25	Advanced Forming Technologies	Superior Concrete Products (Backed by MAG Capital Partners)	-	Advanced Forming Technologies (AFTEC) is a Utah-based company specializing in the design and manufacture of precast concrete fence wall systems and forming equipment
Jan-25	Key-Link Fencing & Railing, Inc.	PrimeSource Brands, Inc. (Backed by Clearlake Capital Partners)	100	Key-Link Fencing & Railing, Inc. is based in New Holland, Pennsylvania (not West Chester as previously stated). It manufactures premium aluminum and vinyl railing and fencing systems for residential and commercial applications
Oct-24	Douglas Lumber Corporation	Builders FirstSource, Inc. (NYSE:BLDR)	100	Douglas Lumber Corporation is a New England-based supplier of building materials, specializing in lumber, fencing, kitchens, and home improvement products. It serves contractors and homeowners through a large-format retail center with design and delivery services
Jul-24	The LandTek Group, Inc.	TenCate Grass Holding B.V.	-	The LandTek Group, Inc., based in Bay Shore, NY, specializes in constructing athletic facilities, including turf fields, tracks, and lighting. It also offers sports-related fencing solutions like perimeter fencing, backstops, and ball containment systems
May-24	EverFence Corporation	Highpost Capital, LLC	100	EverFence Corporation is a U.S.-based fencing company specializing in the design, installation, and maintenance of various fencing solutions, including vinyl, wood, ornamental iron, chain-link, and custom fences
Apr-24	Fence & Deck Direct, Inc.	Decks and Docks Lumber Company, LLC	100	Fence & Deck Direct, Inc., founded in 2007 and based in Halethorpe, Maryland, is a regional supplier specializing in high-quality aluminum fencing, railing, and deck hardware. Catering to both DIY homeowners and professional contractors
Nov-23	Rhino Tool Company Inc.	Palindrome LLP	100	Rhino Tool Company Inc., headquartered in Kewanee, Illinois, is a U.S.-based manufacturer and supplier specializing in high-performance post drivers and fencing installation tools

Selected M&A Transactions

Marquee M&A Deals

Date	Target	Acquiror(s) / Investor(s)	Stake %	Target Business Description
Nov-23	The Vinyl Outlet Inc	ReVamp Companies	100	The Vinyl Outlet is a New York-based company specializing in the design, manufacturing, and installation of vinyl fencing, decking, and railing products
Nov-23	Ideal Fencing Corp	GeoStabilization International	100	Ideal Fencing Corp. is a Colorado-based contractor specializing in highway and infrastructure fencing solutions, including guardrails, crash barriers, and security fencing
Aug-23	Finyl Sales, Inc.	Walpole Outdoors, LLC	100	Finyl Sales, Inc., based in Ocala, Florida, is a fabrication and dealer company specializing in architectural millwork and exterior products. They offer a wide range of custom and pre-fabricated solutions, including fencing, railings, columns, pergolas, trellises, shutters, louvers, brackets, and trim packages
Aug-23	Allstate Rent A Fence	American Fence Company	-	Allstate Rent A Fence is a Phoenix-based provider of temporary fencing solutions for construction sites, events, and emergency response needs
Jul-23	Cam Services	Tendit Group	100	CAM Services is a Denver-based company specializing in a wide range of exterior facility maintenance services, including fencing solutions. Established in 1999 and headquartered at 2525 W 64th Ave, Denver
Jun-23	Fortress Fencing LLC	Cinterra	100	Fortress Fencing LLC is a U.S.-based commercial and industrial fencing contractor headquartered in Carrboro, North Carolina. Founded in 2001, the company specializes in high-security fencing solutions for solar farms, substations, utilities, and large-scale infrastructure

Have questions about this report or would like to speak to our team?

Reach out to:



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