

US Fencing Services M&A Update

Sector Brief Review



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US Fencing Services Market M&A Overview

- Fencing services encompass the professional design, installation, repair, and maintenance of physical barriers around residential, commercial, or agricultural properties
- **PE buyers** have shown strong interest in fencing services companies
- Deal volume in **H2 2025** was up **~130%** as compared to **H1 2025**
- Notable transactions in the market include:
 - **Harkness Capital Partners'** acquisition of **Premier Fence** (Oct 2025)
 - **Perimeter Solutions Group's** acquisition of **Strategic Fence and Wall** (Feb 2025)
- United States fencing market stood at **~\$9.4Bn** in **2024** and is expected to reach USD **~14.9Bn** by 2033, growing at a CAGR of **5.3%**

Key Trends Shaping Fencing Market M&A

Residential construction tailwinds are driving demand for fencing services fueling M&A activity in the sector

Rising security concerns are increasing adoption of advanced fencing solutions across residential and commercial segments

Growth in home improvement spending is creating recurring demand for fencing services; Spending across single-family and multifamily housing is expected to grow at **~5% CAGR from 2025 to 2029**

Highly fragmented industry structure provides a large pipeline of acquisition targets, enabling sponsor-backed platforms to scale through add-ons

Fencing Services Market – Key Trends



Rising Homeownership & Residential Demand

The rising demand for residential fencing is the fastest-growing segment at a 5.7% CAGR, fueled by urbanization, outdoor living trends and DIY installations. The U.S. fencing market was valued at \$9.4B in 2024 and is projected to reach \$14.9B by 2033 at a 5.3% CAGR



Growing Adoption of Smart Fencing & Advanced Materials

Smart fences equipped with IoT sensors, cameras, and intrusion detection are gaining traction across residential and commercial applications. Demand for low-maintenance and eco-friendly materials such as composite fencing and recycled plastic is rising



Growth in Government Spending & Real-Estate Market

The booming real estate sector and increased public investment in infrastructure are fueling demand for ornamental fencing that blends security with sophisticated design

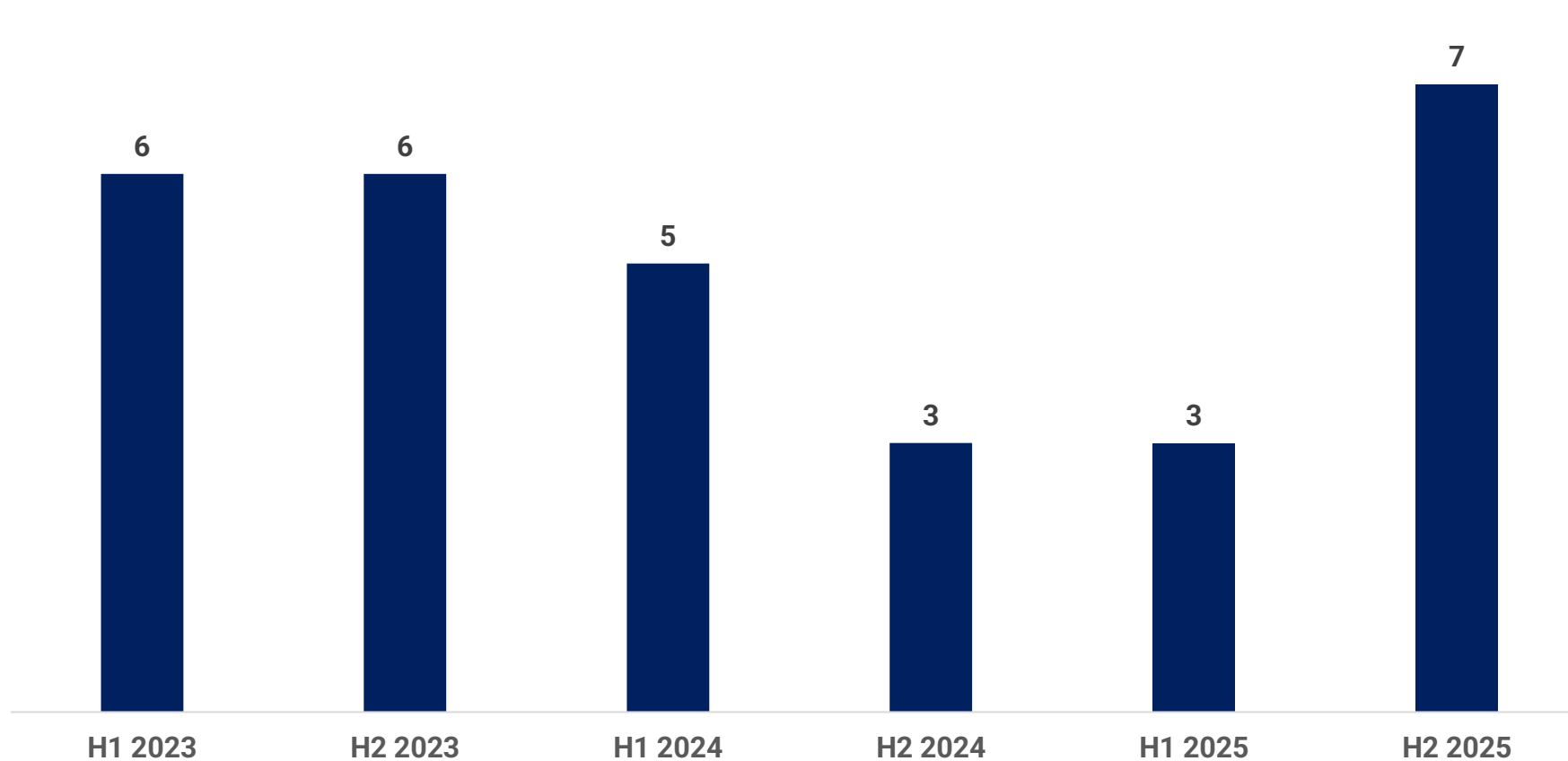


Technological Integration and Smart Security Solutions

The integration of solar and electric technologies, alongside the shift toward automated gate systems, is transforming fencing from a passive barrier into a high-tech, sustainable solution for modern security and agricultural management







Fencing Services M&A Activity Rebounded Strongly in H2 2025

Volume of Deals in US Fencing Service Market for past 3 Years





- Deal activity hit a new high in H2 2025, driven by an accelerating PE consolidation wave
- H2 2025 recorded 7 transactions, representing a 130%+ surge compared to H1 2025
- The rebound follows a slowdown in H2 2024–H1 2025, indicating renewed M&A momentum

Active PE Backed Platform Buyers



| PE Firm | Platform Company | Platform Overview | Select Acquisitions |
|--|--|---|--|
|  |  | <p>Fenceworks is a provider of fencing products that offers a variety of fencing options including vinyl, wood, tubular steel, chain-link, and concrete fencing; The firm is acquiring fencing service companies as a part of its growth strategy</p> |  |
|  |  | <p>Perimeter Solutions Group is a provider of fencing services offering commercial fencing, temporary fencing, high security and custom solutions. The firm is acquiring fencing service companies to broaden its geographic reach</p> |  |

Active Private Equity Groups




has acquired



has acquired





has acquired



has acquired



has acquired



has acquired



has acquired



has acquired


Selected M&A Transactions

| Date | Target | Acquiror(s) / Investor(s) | Target Business Description |
|--------|---|-------------------------------|---|
| Mar-26 | Midsouth Access Fence & Automatic Gates | Access Data Network Solutions | Midsouth access is a gate company specializing in crafting custom iron fences, gates, and handrails |
| Mar-26 | Security Works | Premier Fence | SecurityWorks is a provider of perimeter security services that offers fence, gate, access control, and video entry systems, as well as installation and repair services |
| Jan-26 | Econo Fence | Perimeter Solutions Group | Econo Fence is a provider of permanent fencing services that specializes in the installation of fences and gates and ironwork |
| Jan-26 | Accurate Fence | Fenceworks | Accurate Fence is a provider of residential and commercial fencing installation services including aluminum, wood, vinyl, and chain-link, serving the Atlanta metropolitan area |
| Jan-26 | ReVamp Companies | Calera Capital | ReVamp Companies is a multi-state platform providing vinyl fence installation and residential floor coating services |
| Dec-25 | Perimeter Holdings | Kian Capital Partners | Perimeter Holdings USA is a platform company comprising multiple legacy fencing, gate, and ironwork brands serving residential and commercial customers |
| Dec-25 | ARX Perimeters | Sunbelt Rentals | ARX Perimeters is a provider of high-security perimeter protection solutions including anti-climb fencing, mobile barriers, and hostile vehicle mitigation systems |
| Oct-25 | Premier Fence | Harkness Capital Partners | Premier Fence is a provider of fencing, guardrail, gates, and access control installation services |

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| Aug-25 | Tusco | Perimeter Solutions Group | Tusco is a nationwide installer of high-security assets including crash-rated fencing and gates, bollards, barriers, and access control systems for data centers, government facilities, and commercial properties |
| Aug-25 | Rick's Custom Fencing and Decking | Tenex Capital Management | Rick's Custom Fencing and Decking is a provider of residential fencing and decking installation services |
| Jul-25 | Fence Builders | Watchtower Capital Partners | Fence Builders is a provider of fencing and gate installation services that offers services including the design, fabrication, and installation of wood, vinyl, ornamental metal, and chain-link fences |
| Jul-25 | Green Hill Fence Company | Watchtower Capital Partners | Green Hill Fence Company is a provider of fence installation services that offers fence construction, installation, gate installation, fence planning and landscaping |
| Apr-25 | Academy Fence Brokers | Southstone Holdings | Academy Fence Brokers is a provider of custom fence design and installation services for residential, commercial, and home developer clients |
| Feb-25 | Strategic Fence & Wall Company | Perimeter Solutions Group | Strategic Fence & Wall is a provider of permanent fence and gate installation, temporary fencing, automated gates, and retaining wall services for residential, commercial, and municipal clients |
| Feb-25 | Kansas Fencing | Fenceworks | Kansas Fencing is a provider of commercial fence installation and temporary rental fence solutions |

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

Reach out to:



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