Federal Market Map - Fencing, gates & perimeter security systems

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Federal buyers put **$62,676,089** of award value across **368 awards** into fencing, gates, and perimeter systems over the last three years. That is a real market, and it is not a crowded one: **216 distinct companies** shared those 368 awards, and **163 of them won exactly one**. The repeat business is concentrated in very few hands. The top three recipients hold **31.7%** of the award value, the top five hold **42.4%**, and the top ten hold **57.1%**.

The split between those two groups is the most important thing in this report. The companies at the top are not winning because they are cheaper. They are winning because they treat federal fencing as a standing product line: American Posts took 27 separate awards, Allied Tube & Conduit took 30, and A.M.S. Network took 11. Everyone below them is catching one job, delivering it, and going back to commercial work. A contractor who shows up on a predictable schedule, in the codes where the buying actually happens, moves from the second group to the first without winning a single unusually large contract.

The buying is also more concentrated than most fence contractors expect. **Department of Defense alone accounts for $35,783,219 across 166 awards**, roughly 57% of the category. Interior ($6,655,229), Agriculture ($5,702,330), and Homeland Security ($5,493,962) follow. These are land-management and installation-security buyers with recurring perimeter requirements, not one-off capital projects.

Competition depth is the opening. Across the thinness table below, the cells that matter most run at a **median of 1 to 3 offers received**. A median of one offer means the winning bidder was frequently the only bidder. The set-aside mix compounds it: **73% of Agriculture's 238990 obligations and 82% of Interior's 332618 obligations ran as set-asides**, which restricts the competitive field to small businesses before a single price is quoted.

The three moves, in order. First, register and pursue under 238990 with Agriculture and Homeland Security, the two largest thin cells with the most addressable dollars. Second, add the product-side codes (332618, 332312, 332323) that carry Interior's and Agriculture's material buys, because those are separate awards from the installation work and are currently going to suppliers, not installers. Third, get in front of the specific contracting offices identified in the buyers report before their next buying window, since in a market with a median of one offer, being present at the right moment is most of the win.

Snapshot (3-year lookback): 368 federal awards with a combined **award value of $62,676,089** matched this category (NAICS 332618, 332323, 332312, 332999, 238990, 236220, 331222, 331221, 561621, 238210, 332510; PSC 5660; keywords: fence, fencing, gate, perimeter security, chain link, barbed wire, razor wire, bollard, guardrail, cattle guard, security fence, vehicle barrier, perimeter fence). *Award value is the current total value of each award and includes multi-year IDIQ/BPA ceilings - it is not single-year spending, and is not directly comparable to the obligations in the competition thinness table below.*

Who buys

Agency	Award value	Awards
Department of Defense	$35,783,219	166
Department of the Interior	$6,655,229	70
Department of Agriculture	$5,702,330	48
Department of Homeland Security	$5,493,962	37
General Services Administration	$3,851,017	5
Department of Justice	$3,270,153	9
Department of Veterans Affairs	$676,625	10
Department of State	$547,523	12
Department of Transportation	$497,537	5
Department of Health and Human Services	$95,584	2
Department of Commerce	$73,401	2
Federal Communications Commission	$17,000	1
National Gallery of Art	$12,509	1

Defense dominates on volume and on dollars: **$35,783,219 across 166 awards**, about 57% of the category's award value and 45% of its award count. Those are installation perimeters, ranges, ammunition storage, and gate systems bought by base-level contracting offices, which means many moderate awards rather than a few large ones. The average DoD award here is roughly $216,000, well inside the range a regional crew can staff and bond.

The second tier is where the pattern changes. **Interior ($6,655,229 over 70 awards), Agriculture ($5,702,330 over 48), and Homeland Security ($5,493,962 over 37)** are land-management and border-security buyers with continuous, weather-driven replacement cycles: allotment fencing, wildlife exclusion, fire rehabilitation, and boundary control. This work recurs on a predictable annual rhythm and skews heavily to small-business set-asides. General Services Administration is worth separate attention for the opposite reason: **$3,851,017 across only 5 awards** means a small number of large, building-perimeter awards where the entry barrier is higher but a single win is significant. Veterans Affairs is small in this table ($676,625) but carries the highest SDVOSB concentration in the market, so it is the right target only for a service-disabled veteran owned firm.

Who wins

Recipient	UEI	Location	Award value	Awards	Last award	Sample award
AMERICAN POSTS LLC	HC4NR2AFYVA2		$9,795,125	27	2026-03-24	8511186949! POST,FENCE,METAL
ALLIED TUBE & CONDUIT CORPORATION	J3WSJTMBRWA1		$5,456,083	30	2026-03-18	8511151318! BARBED WIRE,CONCERT
A.M.S. NETWORK, LLC	P3MDGR69GJM8		$4,591,952	11	2026-03-18	8511576857! BARBED WIRE

Recipient	UEI	Location	Award value	Awards	Last award	Sample award
KNIGHT CONST. & SUPPLY, INC	S6HKH3KV35N3		$3,857,861	1	2026-03-21	ICE HARBOR DAM NAVIGATION LOCK UPSTREAM GATE FABRICATION
DETEKION SECURITY SYSTEMS, INC.	H3EXWAF1A1W7		$2,848,350	1	2024-06-03	LESS LETHAL/ LETHAL FENCE MAINTENANCE CONTRACT. BASE YEAR WIT
DOLIVEIRA SYSTEMS LLC	FGJMA26WK8H9		$2,486,467	1	2024-08-30	THE PURPOSE OF THIS PROJECT IS FOR A TEMPORARY SECURITY FENC
ACCESS COMMUNICATIONS GROUP, LLC	CWBBTJLJJM54		$2,198,709	2	2025-09-12	CONTRACT FOR SECURITY FENCING DEMOLITION AND REPLACEMENT, PO
MUNICIPAL BASE SERVICES LLC	K27BLTXRNSN4		$1,702,241	1	2023-09-12	HURRICANE IDA FENCE REPAIR
SOCIEDAD ESPANOLA DE MONTAJES INDUSTRIALES SA	GN57AL1PC9M4		$1,623,971	1	2022-07-06	REPAIR SOUTH PERIMETER FENCE
JERSEY SHORE STEEL CO	W9XDNLKPD763		$1,227,678	1	2026-01-22	8511872715! POST,FENCE,METAL
BULL FENCE, INC	CQC5F1AT9MM9		$1,038,963	2	2025-06-09	REPLACE SECURITY PERIMETER FENCE, B73
MC DODD CONSTRUCTION LLC	D4D1LCJPNZJ9		$981,424	1	2023-09-18	CHANGE CO FROM VINCENT BUTLER TO ERICA BUSCH FOR USMS REPLAC
NOLAND TOUGH FENCE, LLC	ND1XQAKA3GL1		$909,148	2	2026-05-18	0410 GAOA SOUTH ZONE FENCE REPLACEMENT
VISIONTRON CORP	C5KFEZKS7DA8		$838,533	4	2023-09-05	CONTRACT CLOSEOUT ACTION
VISIONARY CONSTRUCTION INC	L76ZSHNB61Z3		$750,571	1	2023-07-19	ADD COR TO IAS AND IPP

Recipient	UEI	Location	Award value	Awards	Last award	Sample award
STAMPEDE VENTURES, INC.	WT4BZHCLS8X7		$747,924	1	2024-08-13	X006 NEW GOSPORT PERIMETER FENCE
AXIS GLOBAL ENTERPRISES, INC.	GAE3BQFCPWM5		$747,501	1	2022-09-28	PIDC FENCE
VETERANS CONSTRUCTIO N AND DESIGN INC.	UY56NAVLSWL7		$696,151	1	2025-09-16	INSPECTION AND REPAIR OF EXISTING FENCING, INSTALLATION OF N
AMERICAN TECHNOLOGY INTEGRATORS LLC	LXKBUYKKTWL8		$654,582	2	2025-09-20	THE PURPOSE OF THIS FIRM FIXED PRICE FFP PURCHASE ORDER IS P
MYERS CONSTRUCTIO N, INC.	DVXJL17MHD95		$585,208	1	2024-07-24	CONSTRUCTIO N OF PERIMETER SECURITY FENCE WITH VEHICULAR GATE
M. C. DEAN, INC.	RD55NEXJ5EW4		$572,377	1	2023-05-03	INSTALLATION OF GATES AND TRAFFIC ARMS
BAR NONE FEEDS & FARM SUPPLY LLC	MG68DWY58PJ7		$559,131	1	2024-09-18	FENCING MATERIALS NEEDED FOR POST FIRE REPAIR OF ALLOTMENT F
TEPA EC, LLC	EZMNZ2HYHFB7		$539,172	1	2025-09-15	THE PURPOSE OF THIS CONTRACT IS TO ACQUIRE MATERIALS AND INS
SCOTT TOTAL SECURITY LIMITED	MV6BLVNUDW45		$456,702	1	2024-10-01	THIS IS A REQUIREMENT FOR THE 100 SFS FOR AUTOMATED INSTALLA
BURHANI ENTERPRISES INC	QMCVMXTXA9S1		$456,189	2	2025-11-01	ESR WILDFIRE FENCE MATERIALS PROCUREMEN T

Showing top 25 of 216 recipients - the complete ranking is delivered with this report as a data appendix.

There are two distinct competitor types in this table, and confusing them leads contractors to the wrong conclusion about how hard this market is.

The first type is the **materials supplier with a standing federal line**. American Posts LLC ($9,795,125 over 27 awards), Allied Tube & Conduit ($5,456,083 over 30), and A.M.S. Network ($4,591,952 over 11) are winning repeat, catalog-style orders: fence posts, barbed and concertina wire, fittings. Their sample award descriptions are stock-numbered line items, not projects. They compete on availability and delivery against a known buying rhythm. Between them they hold **31.7% of the entire category**, and they got there through frequency, not deal size. Their median award is well under $400,000.

The second type is the **project contractor who won once**. Knight Const. & Supply ($3,857,861 on a single award), Detekion Security Systems ($2,848,350 on one), Doliveira Systems ($2,486,467 on one), and Municipal Base Services ($1,702,241 on one) each landed a large perimeter job and do not appear again. **163 of the 216 recipients in this market won exactly one award.** That is the single clearest signal in the report: the majority of this market's participants are not building a federal practice, they are catching one job.

The practical read for a regional fencing contractor is that neither group is defended. The suppliers can be competed on installed work they do not perform. The one-time winners hold no incumbency worth protecting and, in most cases, are not bidding the follow-on. Peers of comparable size are already present here: Bull Fence ($1,038,963 over 2 awards), Noland Tough Fence ($909,148 over 2), Myers Construction ($585,208), and Visionary Construction ($750,571) are all small regional firms holding real federal awards. Nothing in this table requires national scale to enter.

Competition thinness

Median *offers received* per NAICS × agency cell - fewer offers means a thinner, more winnable market. (Cells limited to this category's NAICS codes.)

Scope note: obligations below are scoped to the PSC codes the category actually buys (5660, 5680, Y1PZ, Z1PC, Z2PZ) - every row reflects real addressable market, not a coarse NAICS catch-all. Obligations are summed over the swept window (FY2023+FY2024+FY2025) from the USASpending Award Data Archive - a different measure and time window from the multi-year award value in the "Who buys / Who wins" tables above. The two are not directly comparable; a single recipient's multi-year ceiling can exceed these obligations. Set-aside % and SDVOSB % are at NAICS-cell level (not PSC-scoped). Per-fiscal-year obligations for each cell are itemized in the accompanying data appendix.

NAICS	Agency	Awards	Obligations (FY23-25)	Median offers	Set-aside %†	SDVOSB %†	Winners	PSCs
238210	Dept. of Veterans Affairs	2	$1,347,937	1.5	45%	38%	2	Y1PZ, Z2PZ
238990	Dept. of Veterans Affairs	17	$5,733,504	1.0	36%	31%	15	5660, Y1PZ, Z2PZ
332312	Dept. of Veterans Affairs	1	$22,025	1.0	50%	25%	1	5660

NAICS	Agency	Awards	Obligations (FY23-25)	Median offers	Set-aside %†	SDVOSB %†	Winners	PSCs
561621	General Services Administration	1	$17,996	1.0	28%	4%	1	Z2PZ
561621	Dept. of Transportation	1	$50,187	1.0	6%	1%	1	5660
561621	Dept. of Defense	7	$1,105,362	5.0	23%	1%	7	5660, 5680, Z2PZ
561621	Dept. of Agriculture	1	$12,116	2.0	37%	1%	1	5660
561621	Dept. of Homeland Security	2	$657,741	4.0	28%	1%	2	5660
238210	Dept. of Homeland Security	7	$178,862	4.0	43%	1%	7	5660, Y1PZ, Z2PZ
332999	Dept. of Justice	8	$207,580	2.0	28%	0%	8	5660, 5680
561621	Dept. of Justice	4	$84,184	2.0	6%	0%	3	5660
236220	Dept. of Justice	7	$657,072	1.0	24%	0%	6	5680, Y1PZ
236220	Dept. of Energy	4	$207,057	0.0	14%	0%	2	Y1PZ
236220	Dept. of Commerce	1	$11,000	11.0	51%	0%	1	Y1PZ
238990	Dept. of Homeland Security	47	$6,383,056	1.0	51%	0%	37	5660, 5680, Y1PZ, Z2PZ
238210	Dept. of Justice	5	$1,667,022	1.0	26%	0%	5	5660, 5680, Z2PZ
236220	Dept. of the Treasury	2	$617,895	2.0	33%	0%	2	Z2PZ
332999	Dept. of Homeland Security	4	$620,186	1.0	26%	0%	3	5660, 5680
238990	Dept. of Health and Human Services	7	$198,669	2.0	49%	0%	5	5660, 5680, Y1PZ
238990	Dept. of the Treasury	1	$3,332,475	6.0	33%	0%	1	5680
238990	General Services Administration	5	$3,065,762	1.0	57%	0%	5	5660, Z2PZ
332999	Dept. of Health and Human Services	6	$115,000	1.0	11%	0%	6	5680
238990	Dept. of Justice	8	$458,362	1.0	39%	0%	7	5660, 5680, Z2PZ

NAICS	Agency	Awards	Obligations (FY23-25)	Median offers	Set-aside %†	SDVOSB %†	Winners	PSCs
238210	Environmental Protection Agency	1	$10,413	1.0	17%	0%	1	Z2PZ
332618	Dept. of State	10	$213,350	1.0	0%	0%	4	5660, Y1PZ
332323	General Services Administration	100	$37,311	n/r	1%	0%	2	5660, 5680
332510	National Gallery of Art	1	$3,712	1.0	0%	0%	1	5680
236220	Dept. of Veterans Affairs	73	$35,672,453	2.0	57%	55%	27	5660, 5680, Y1PZ, Z2PZ
332323	Dept. of Veterans Affairs	6	$193,147	2.0	71%	50%	5	5660, Z2PZ
332618	Dept. of Veterans Affairs	1	$15,500	1.0	62%	25%	1	5660
332999	Dept. of Veterans Affairs	1	$15,972	2.0	49%	20%	1	5680
236220	Dept. of Homeland Security	155	$6,309,071,294	4.0	38%	2%	48	5660, 5680, Y1PZ, Z2PZ
238990	Dept. of Commerce	5	$204,901	6.0	76%	2%	5	5660, Y1PZ, Z2PZ
238990	Dept. of Transportation	12	$5,679,342	1.0	31%	2%	5	5660, Y1PZ, Z2PZ
238210	Dept. of Agriculture	2	$158,410	11.5	61%	1%	2	Y1PZ
238210	Dept. of Defense	56	$61,057,426	2.5	39%	1%	29	5680, Y1PZ, Z2PZ
238210	Dept. of the Interior	9	$688,454	2.0	64%	1%	9	Y1PZ, Z2PZ
561621	Dept. of the Interior	2	$40,721	2.5	50%	1%	2	5660
332999	Dept. of Defense	131	$26,108,371	1.0	11%	1%	59	5660, 5680
236220	Dept. of Agriculture	16	$11,038,575	2.0	47%	0%	16	5660, Y1PZ, Z1PC, Z2PZ
236220	General Services Administration	8	$18,146,561	1.0	35%	0%	8	5660, 5680, Y1PZ, Z2PZ

NAICS	Agency	Awards	Obligations (FY23-25)	Median offers	Set-aside %†	SDVOSB %†	Winners	PSCs
236220	Dept. of the Interior	72	$73,695,196	2.0	31%	0%	55	5660, 5680, Y1PZ, Z2PZ
332618	Dept. of Defense	63	$15,279,574	3.0	6%	0%	43	5660, 5680
332312	Dept. of Defense	219	$78,112,806	2.0	0%	0%	67	5660, 5680, Z2PZ
238210	Dept. of State	5	$1,423,559	3.0	1%	0%	4	5660, 5680, Y1PZ, Z2PZ
561621	Dept. of State	14	$413,412	1.0	2%	0%	5	5660, 5680
331222	Dept. of Defense	26	$10,185,803	1.5	16%	0%	7	5660, 5680
332510	Dept. of State	6	$177,883	2.0	0%	0%	5	5660, 5680
332323	Dept. of Defense	29	$3,371,556	5.0	24%	0%	25	5660, 5680, Z2PZ
332510	Dept. of Agriculture	5	$177,688	3.0	34%	0%	5	5660
332999	Dept. of the Interior	23	$1,077,704	9.5	57%	0%	16	5660, 5680
332999	Dept. of Agriculture	9	$631,304	5.0	48%	0%	9	5660, 5680
332618	Dept. of Homeland Security	2	$77,211	6.5	17%	0%	2	5660
332999	Dept. of State	6	$238,316	2.0	3%	0%	4	5660, 5680
332999	Dept. of Commerce	1	$169,350	2.0	56%	0%	1	5680
332999	Dept. of Transportation	1	$19,053	1.0	4%	0%	1	5680
332618	Dept. of Justice	2	$22,433	1.5	10%	0%	2	5660
332323	Dept. of State	5	$131,305	1.0	0%	0%	4	5660
332510	Dept. of Veterans Affairs	1	$13,065	3.0	64%	29%	1	5680
238990	Dept. of the Interior	154	$43,812,359	4.0	86%	1%	105	5660, 5680, Y1PZ, Z2PZ
332510	Dept. of the Interior	20	$1,460,231	2.5	53%	0%	10	5660, 5680
332510	Dept. of Defense	60	$7,886,841	1.0	5%	0%	32	5660, 5680
236220	Dept. of State	28	$12,092,313	3.0	17%	0%	13	5680, Y1PZ, Z1PC, Z2PZ

NAICS	Agency	Awards	Obligations (FY23-25)	Median offers	Set-aside %†	SDVOSB %†	Winners	PSCs
332999	General Services Administration	429	$177,101	n/r	4%	0%	9	5680
332510	Dept. of Homeland Security	4	$225,063	2.5	47%	0%	4	5660, 5680
238990	Dept. of State	8	$1,254,652	1.5	1%	0%	7	5660, Y1PZ, Z2PZ
332510	Dept. of Justice	1	$27,000	3.0	24%	0%	1	5660
332510	Dept. of Health and Human Services	15	$774,522	3.0	13%	0%	8	5680
332323	Dept. of the Interior	10	$381,126	3.0	90%	0%	10	5660, 5680
332312	Dept. of State	3	$58,168	3.0	4%	0%	3	5660, 5680, Z2PZ
332323	Dept. of Homeland Security	2	$45,297	8.5	33%	0%	2	5660
238990	Dept. of Agriculture	109	$25,470,279	3.0	73%	1%	65	5660, 5680, Y1PZ, Z1PC, Z2PZ
331221	Dept. of Defense	32	$7,783,861	2.0	30%	1%	7	5660, 5680
236220	Dept. of Defense	550	$806,809,369	4.0	17%	0%	301	5660, 5680, Y1PZ, Z1PC, Z2PZ
332312	Dept. of the Interior	11	$1,410,265	6.0	86%	0%	9	5660, 5680
332618	Dept. of the Interior	24	$1,552,211	4.0	82%	0%	15	5660, 5680, Y1PZ, Z2PZ
236220	Social Security Administration	1	$227,809	3.0	15%	0%	1	5680
332312	Dept. of Agriculture	4	$159,806	8.0	72%	0%	4	5680
332618	Dept. of Agriculture	22	$1,749,140	6.0	69%	0%	15	5660
331222	Dept. of the Interior	6	$513,388	7.0	100%	0%	6	5660, 5680
332323	Dept. of Agriculture	7	$256,159	9.0	89%	0%	7	5660, Y1PZ
331221	Dept. of the Interior	2	$117,838	10.5	100%	0%	2	5680

NAICS	Agency	Awards	Obligations (FY23-25)	Median offers	Set-aside %†	SDVOSB %†	Winners	PSCs
332312	General Services Administration	1	$34,185	1.0	29%	0%	1	5660

† Set-aside % and SDVOSB % are measured at the full NAICS × agency cell level.

Read this table by looking at median offers first and dollars second. A median of 1.0 means that in a typical award in that cell, the winner faced no other bidder. The largest genuinely thin cell in the category is **238990 at Agriculture: 109 awards, $25,470,279 in obligations, a median of 3 offers, and 65 distinct winners**, which is broad enough that no incumbent controls it. Below it, **238990 at Homeland Security ($6,383,056, median 1.0 offer, 37 winners)** and **238990 at Veterans Affairs ($5,733,504, median 1.0 offer)** are thinner still. On the product side, **332618 at Interior ($1,552,211, median 4 offers)** and **332312 at Interior ($1,410,265, median 6 offers)** are more contested but much smaller fields, with 15 and 9 winners respectively.

The set-aside mix is what makes those numbers actionable rather than merely interesting. **73% of the Agriculture 238990 obligations, 82% of Interior's 332618, 86% of Interior's 332312, and 100% of Interior's 331222 ran as set-asides.** In those cells a large national contractor is not permitted to compete at all, so the median offer count is not a temporary condition, it is structural. Two cautions. The VA rows carry high SDVOSB percentages (31% on 238990, 55% on 236220), so they are only addressable with that certification in hand. And the 236220 rows should be read as context, not as targets: that code is commercial and institutional building construction, so those obligations mostly represent whole buildings that happened to include perimeter work, not fencing contracts a specialty firm would bid.

Channel landscape

Federal fencing moves through three channels, and they call for different approaches.

Direct materials supply. The top of the recipient table is this channel: American Posts, Allied Tube & Conduit, Jersey Shore Steel, and A.M.S. Network sell posts, wire, and fittings against stock-numbered requirements, largely to Defense Logistics Agency and installation supply activities. Their award descriptions carry NSN prefixes, which means the requirement is catalogued and repeats. An installer does not displace these firms; the productive move is to buy from them at distributor terms and compete on the installed-work awards they do not bid.

Installation and repair task orders. This is the Y1PZ and Z2PZ work visible in the PSC column of the thinness table, concentrated at Agriculture, Interior, and Homeland Security. It is frequently issued as IDIQ task orders against a regional multiple-award pool, which matters for sequencing: winning a seat on the IDIQ is the real competition, and task orders afterward are competed only among seat holders. Getting on the vehicle is worth more than winning any single task order.

Security-integration subcontracting. Detekion Security Systems, Access Communications Group, Advantor Systems, and American Technology Integrators win the electronic side of perimeter security: sensors, gate operators, intrusion detection. They routinely need a licensed fencing subcontractor for the physical barrier. This is the fastest channel to first federal past performance because it requires no prime award, and these firms are identifiable by name from this table.

Dealer-level detail (which lines each distributor carries, GSA Advantage listings, and current authorized-dealer terms) is per-engagement research and is delivered as a separate channel packet.

Pathways in

Micro-purchase and simplified acquisition. The fastest entry. Purchases up to the $15,000 micro-purchase threshold can be made on a government purchase card with no competition required, and acquisitions up to the $350,000 simplified acquisition threshold are reserved for small business. Both figures rose on 2025-10-01, from $10,000 and $250,000; most guidance still online cites the old numbers, which understates how much work sits in the fast band. A large share of the Interior and Agriculture repair awards in this report fall inside that band. This route needs an active SAM.gov registration and a contracting officer who knows the company exists, nothing more.

Small business set-asides. This is the primary path given the set-aside percentages above. Total small business set-asides run **73% of Agriculture's 238990 obligations** and **82% to 100% of Interior's product-code cells**. Eligibility follows the SBA size standard for the code being bid: 238990 uses a receipts-based standard, while the manufacturing codes (332618, 332312, 332323) use employee-count standards. Confirm the size standard for each code before representing size in SAM, since they are not the same test.

Socioeconomic certifications. Worth pursuing only where the data supports it. SDVOSB concentration is meaningful at Veterans Affairs (31% of 238990, 55% of 236220) and negligible elsewhere in this category, so VetCert is a VA-focused play, not a general one. HUBZone is worth checking against the firm's address because much of the Interior and Agriculture work sits in rural designated areas.

IDIQ vehicles. Agriculture and Interior issue regional fencing IDIQs, which several recipients in this table hold. These are the highest-value target because they convert one competitive win into multi-year task-order flow. They are announced as sources sought well before solicitation, which is the window this engagement monitors.

Subcontracting. Prime contracts above $750,000 carry small business subcontracting plan obligations, so the security integrators and general contractors in this market have a compliance reason to take the call. This is the route to documented federal past performance without a prime award.

GSA Schedule. Realistic timeline is 6 to 12 months from offer submission to award, and it is not the right first step here. Only $3,851,017 of this category ran through GSA over three years, across 5 awards. Revisit once direct past performance exists.

Recommendations

1. **Add the product-side NAICS codes to the SAM registration this month: 332618, 332312, and 332323.** Interior and Agriculture buy fencing materials under these codes as awards separate from the installation work (332618/Interior $1,552,211 at a median of 4 offers; 332312/Interior $1,410,265 at a median of 6; 332618/

Agriculture $1,749,140 at a median of 6). Registration is a form, not a capability investment, and without it these solicitations are never seen.

2. **Make 238990 at Agriculture the primary pursuit lane.** It is the largest thin cell in the category: 109 awards, $25,470,279 in obligations, a median of 3 offers, 65 distinct winners, and 73% run as small business set-asides. No incumbent controls it and the work recurs annually on fire rehabilitation and allotment cycles.

3. **Make 238990 at Homeland Security the second lane.** $6,383,056 across 47 awards at a **median of 1 offer** and 51% set-aside. A median of one offer means most of these awards went to whoever was present and eligible.

4. **Call the three security integrators named in the competitor table this quarter**: Detekion Security Systems, Access Communications Group, and American Technology Integrators. Each holds perimeter-security awards requiring physical fence installation they do not self-perform, and primes above $750,000 carry subcontracting plan obligations. This is the shortest path to documented federal past performance.

5. **Track the Agriculture and Interior fencing IDIQs and respond to every sources-sought notice**, not just the solicitations. Several recipients in this table hold regional fencing IDIQs; a seat converts one competitive win into multi-year task-order flow, and the pre-solicitation window is where requirements are still shapeable.

6. **Do not pursue Veterans Affairs or GSA yet.** VA's fencing spend is small ($676,625) and its thin cells are 31% to 55% SDVOSB, which is unavailable without VetCert. GSA moved only $3,851,017 across 5 large awards, and a Schedule takes 6 to 12 months. Both become reasonable after the first two lanes produce past performance.

7. **Do not try to displace American Posts, Allied Tube, or A.M.S. Network.** They hold 31.7% of the category on catalog materials supply against stock-numbered requirements. Buy from them at distributor terms and compete on installed work instead.

Methodology & sources

All award data is drawn from **USASpending.gov** (FPDS contract data, US-government public-domain), retrieved 2026-07-25. Competition thinness uses the *number_of_offers_received* field from the USASpending Award Data Archive. Recipient identifiers (UEI) are as reported in FPDS and verifiable on SAM.gov. No licensed entity data (SAM Entity API / Dun & Bradstreet) is used in this report.