



# ACMA Industry Statistics Program Report

**Full Year 2022 - Total Composites\* Industry Report**

\*Total Composites = glass reinforced polyester/vinyl ester thermoset composites

**Release: March 17, 2023**

**Compiled by Vault Consulting, LLC**



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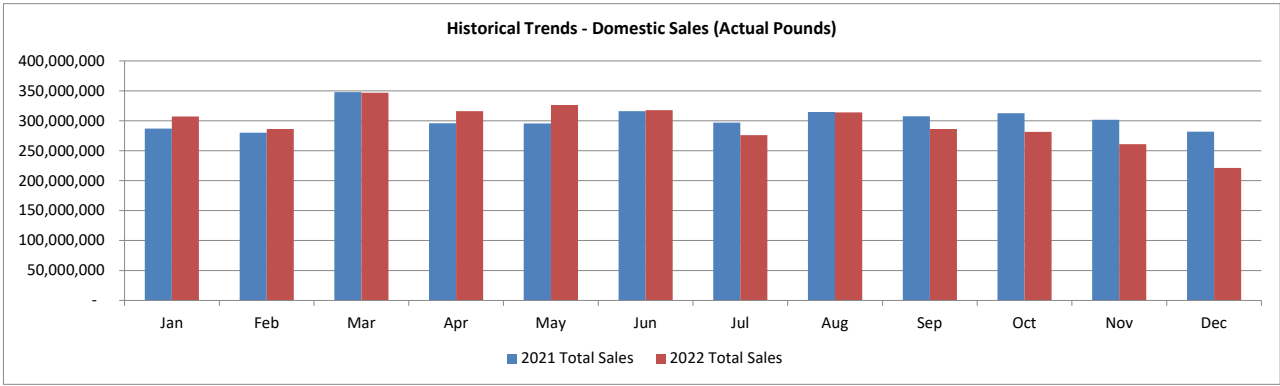
# ACMA Total Composites Industry\* Report

## Executive Summary

Full Year 2022

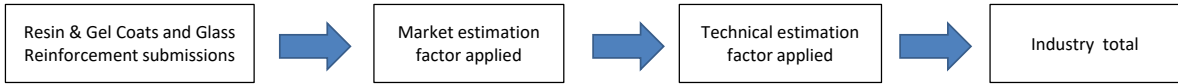
\*Total Composites = glass reinforced polyester/vinyl ester thermoset composites

DOMESTIC SALES (US + Canada) POUNDS	2022 YTD	2021 YTD	2022 YTD vs 2021 YTD % Change
Marine	379,700,242	377,096,746	0.7%
Transportation	659,052,011	724,008,936	-9.0%
Infrastructure	868,360,479	845,972,470	2.6%
Construction	1,090,293,051	1,142,303,200	-4.6%
Other	543,305,890	548,591,326	-1.0%
<b>TOTAL</b>	<b>3,540,711,673</b>	<b>3,637,972,678</b>	<b>-2.7%</b>



**Methodology:**

The chart below shows the process used to calculate the total composites number. Only the industry totals are published.

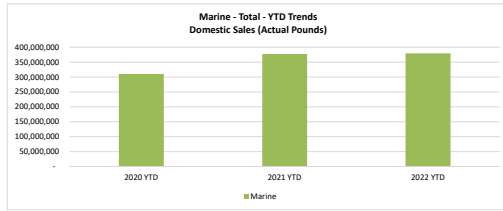


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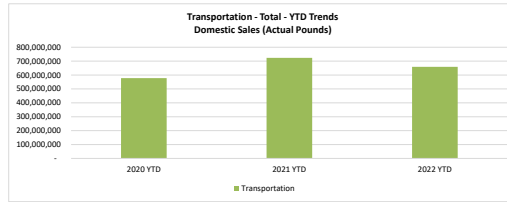
**ACMA Total Composites\* Industry Report**  
**Graphical Analysis**  
**Full Year 2022**

\*Total Composites = glass reinforced polyester/vinyl ester thermoset composites

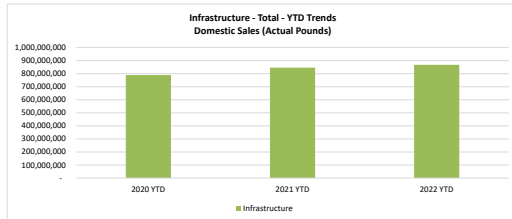
**Marine**



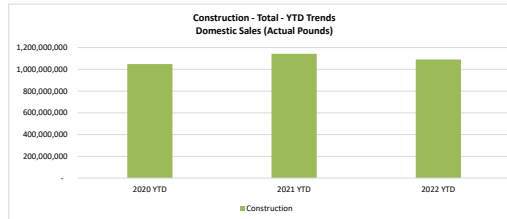
**Transportation**



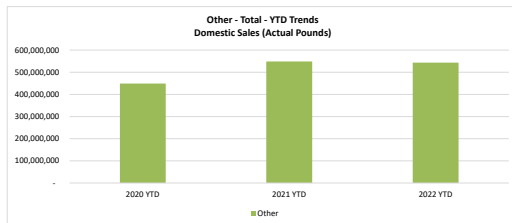
**Infrastructure**



**Construction**



**Other**



**ACMA Total Composites Industry\* Report**

**Full Year 2022**

\*Total Composites = glass reinforced polyester/vinyl ester thermoset composites

DOMESTIC SALES (US + Canada) POUNDS	Jan 2020	Feb 2020	Mar 2020	Apr 2020	May 2020	Jun 2020	Jul 2020	Aug 2020	Sep 2020	Oct 2020	Nov 2020	Dec 2020	2020 YTD
Marine	30,313,640	28,764,471	28,050,123	8,643,660	20,190,490	25,525,117	26,904,046	28,169,397	29,018,859	31,297,348	28,877,148	24,384,941	310,139,240
Transportation	59,599,829	55,429,124	50,137,385	20,605,378	21,699,777	36,292,417	44,723,638	52,560,637	56,651,939	62,094,517	59,829,149	58,296,509	577,920,299
Infrastructure	72,902,842	66,841,342	73,940,702	59,210,847	59,292,828	59,592,744	64,428,060	67,183,560	71,118,984	73,859,792	62,045,180	59,095,598	789,512,479
Construction	89,639,505	87,643,658	92,616,246	71,205,619	74,601,260	87,417,644	89,831,335	90,005,648	95,979,385	96,305,482	90,659,107	82,436,888	1,048,341,777
Other	40,460,260	40,555,342	41,186,549	28,746,995	27,709,981	30,939,335	36,318,322	38,173,345	40,329,333	44,316,332	37,746,275	42,625,183	449,107,252
<b>TOTAL</b>	<b>292,916,076</b>	<b>279,233,937</b>	<b>285,931,005</b>	<b>188,412,499</b>	<b>203,494,336</b>	<b>239,767,257</b>	<b>262,205,401</b>	<b>276,092,587</b>	<b>293,098,500</b>	<b>307,873,471</b>	<b>279,156,859</b>	<b>266,839,119</b>	<b>3,175,021,047</b>

**ACMA Total Composites Industry\* Report  
Full Year 2022**

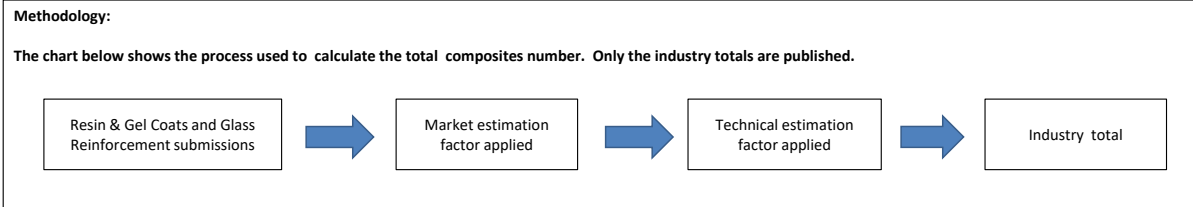
\*Total Composites = glass reinforced polyester/vinyl ester thermoset composites

DOMESTIC SALES (US + Canada) POUNDS	Jan 2021	Feb 2021	Mar 2021	Apr 2021	May 2021	Jun 2021	Jul 2021	Aug 2021	Sep 2021	Oct 2021	Nov 2021	Dec 2021	2021 YTD	2021 YTD vs 2020 YTD
Marine	31,534,950	30,560,582	38,437,133	30,320,732	30,664,214	33,220,440	29,182,413	32,473,385	30,508,001	32,449,227	30,934,599	26,811,070	377,096,746	21.6%
Transportation	64,083,723	59,634,867	72,170,809	58,551,944	59,180,719	59,225,533	59,682,810	59,126,161	62,481,521	60,117,326	55,069,440	54,684,083	724,008,936	25.3%
Infrastructure	58,878,649	57,820,374	74,548,998	67,902,700	70,803,623	77,415,168	71,328,484	79,130,960	75,191,408	76,470,776	71,092,893	65,388,437	845,972,470	7.2%
Construction	93,347,468	87,981,599	110,862,510	93,620,688	91,079,444	98,337,116	93,106,989	96,407,873	93,797,330	93,935,136	96,961,793	92,865,254	1,142,303,200	9.0%
Other	39,068,930	44,112,730	51,982,915	45,627,393	43,664,184	48,022,540	43,607,582	47,696,855	45,636,403	49,550,679	47,586,122	42,034,993	548,591,326	22.2%
<b>TOTAL</b>	<b>286,913,720</b>	<b>280,110,152</b>	<b>348,002,365</b>	<b>296,023,457</b>	<b>295,392,184</b>	<b>316,220,797</b>	<b>296,908,278</b>	<b>314,835,234</b>	<b>307,614,663</b>	<b>312,523,144</b>	<b>301,644,847</b>	<b>281,783,837</b>	<b>3,637,972,678</b>	<b>14.6%</b>

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Full Year 2022**

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DOMESTIC SALES (US + Canada) POUNDS	Jan 2022	Feb 2022	Mar 2022	Apr 2022	May 2022	Jun 2022	Jul 2022	Aug 2022	Sep 2022	Oct 2022	Nov 2022	Dec 2022	2022 YTD	2022 YTD vs 2021 YTD
Marine	31,771,414	29,169,422	35,880,225	33,449,839	33,902,197	35,175,175	26,782,964	35,244,084	29,961,606	33,580,781	30,492,348	24,290,187	379,700,242	0.7%
Transportation	59,975,873	55,128,750	67,349,591	59,251,314	62,416,915	59,130,671	53,126,717	55,531,234	52,221,696	46,436,369	46,520,678	41,962,203	659,052,011	-9.0%
Infrastructure	68,897,197	67,537,537	80,306,628	74,579,855	75,524,868	75,334,321	70,216,705	79,499,390	71,986,352	75,101,906	68,918,039	60,457,681	868,360,479	2.6%
Construction	98,381,204	88,730,217	109,909,312	97,182,739	103,518,845	100,403,895	85,433,119	98,041,162	88,500,493	84,728,871	76,653,197	58,809,997	1,090,293,051	-4.6%
Other	48,086,477	45,672,243	53,420,602	51,678,677	51,052,412	47,834,145	40,374,679	45,709,656	43,678,877	41,496,901	38,472,447	35,828,774	543,305,890	-1.0%
<b>TOTAL</b>	<b>307,112,165</b>	<b>286,238,169</b>	<b>346,866,358</b>	<b>316,142,424</b>	<b>326,415,237</b>	<b>317,878,207</b>	<b>275,934,184</b>	<b>314,025,526</b>	<b>286,349,024</b>	<b>281,344,828</b>	<b>261,056,709</b>	<b>221,348,842</b>	<b>3,540,711,673</b>	<b>-2.7%</b>



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## ACMA Industry Statistics Program Definitions

### General Program Rules and Definitions:

- General definitions for Resins and Glass Reinforcements
  - o Glass Reinforcements includes: Rovings, chopped strands & mats (continuous & chopped), converted/knitted fabrics for polyester/vinyl ester thermoset composites.
  - o Resins and Gel Coats include: Formulations of unsaturated polyester and vinyl ester resin (excluding gel coat base resins) and formulated gel coat.
- Report Gel Coat in the appropriate market categories. Exclude sales of gel coat base resin.
- Domestic Region – the United States and Canada. Exclude territories such as Puerto Rico, US Virgin Islands Guam, etc. Include all sales in the domestic region, including materials produced outside of region. DO NOT REPORT ANY EXPORT SALES.
- Manufacturers should exclude all Sales to Distributors and Convertors
- Captive Use – sales to a company that is 50% or more owned by the seller. These sales are to be included.
- Co-Producer Sales and Swaps – if you sell material to another participating company (excluding distributors) the purchasing company is to report the pounds.

### Market Segments

<b>Marine:</b> Manufacture, maintenance or repair of pleasure, commercial or military watercraft, including component parts and motor covers. Includes formulated gel coat for Marine.
Examples include: Any part or component of a watercraft
Exclude: Infrastructure, such as docks, piers, floating structures for wind turbines and barge covers

Marine Submarkets:	Examples include:
Recreational	yachts, fishing boats, sailboats, personal water craft
Other	commercial and military craft

<b>Transportation:</b> Manufacture, maintenance or repair (excluding body putty) of land and air transportation vehicles, including parts or components for passenger vehicles, heavy trucks, truck trailers and aerospace.	
Examples Include:	
Accessories/after-market included	Instrument panels
Aerospace and aircraft components	Integrated Front Ends
Agriculture	Load Floors
Auto and truck body panels	Marine docks
Automotive parts	Mooring buoys
Autos	Motorcycle
Buses	Pick-up box covers
Closures: Doors, deck lids and lift gates	Pail/barge covers
Door inserts and headliners	RVs
Exterior body panels (fender, hoods, quarter panels and roof tops)	Trains
Floats	Truck caps/tonneau covers
Formulated Gel Coat for Transportation	Underbody shields and engine covers
Exclude: body putty, marine (as stated above)	



Transportation Submarkets:	Examples include:
Aerospace	personal, business and commercial aircraft
Automotive	passenger vehicle components; body panels; pickup beds
Commercial	heavy truck; agricultural & construction equipment; ground military vehicles; freight rail
Mass Transit	buses; passenger rail; subway cars
RV & Aftermarket	RVs; pick-up caps; conversion kits

Infrastructure:	
Manufacturer, maintenance or repair of parts, components or installations used in bridge, road, utility, water treatment, chemical processing, chemical and power distribution, seawalls, mining, energy, and wind.	
Examples Include:	
Bridge decks and overlays	Highway pavements
Cell towers	I-beams
Chemical processing	Light and power poles
CIPP	Manholes
Civil construction	Mining
Composite pipes	Polymer concrete
Cross-arms	Port components
Ducts	Power poles
Fences and railings and water and sewer pipes	Roads/bridges
Fittings	Tanks
Formulated Gel Coat for Infrastructure	Water treatment
Grating	Wind energy
Exclude: Commercial and residential components.	

Infrastructure Submarkets:	Examples include:
Energy	energy generation & distribution; wind, solar and hydro energy; utility structures; power poles & crossarms
Industrial	chemical processing; mining; pollution control; water processing; oil & gas; pipe & tank; CIPP
Transportation Structures	bridge, road & marine infrastructure; seawalls

Construction:	
Manufacturer, maintenance or repair of Residential, Commercial and industrial construction articles and building structure. Includes pultrusion resins unless specifically marked for infrastructure or another market segment.	
Examples include:	
Architectural decorative parts	Fixtures
Architectural columns	Floor grates
Bathroom and kitchen	Formulated Gel Coat for Construction
Baths and shower stalls	Hand rails
Building panels	Insulation screens & decorative items
Building parts	Ladder rails
Cable trays	Onyx
Columns	Reinforced concrete
Composite walls	Roofing panels
Cooling towers	Sinks
Counter tops	Skylight boards
Cultured marble	Surfaces
Door skins, cooling tower, and components	Swimming pools & spas
Electrical, construction or architectural panels	Window lineals
Electrical and electronic components	
Exclude: N/A	



<b>Construction Submarkets:</b>	<b>Examples include:</b>
Architencural & Structural	windows; doors; exterior cladding; interior surface panels (reinforced); facades; sculpture; foundations; structural panels; beams; decking
Kitchen / Bath / Pool / Cast polymers	engineered stone; solid surface; counter tops; sinks; tubs; showers; pools; spas

<b>Other: everything else</b>	
Examples include:	
Bowling	Leisure equipment
Consumer goods	Putty base resin
Drills	Sporting goods (Surfboards, etc.)
Formulated Gel Coat for Other	Surface coatings (not gel coat)
Furniture	Rakes
Hose bibs	Tools of all types
Exclude: boats (covered in Marine)	

<b>Other Submarkets:</b>	<b>Examples include:</b>
Consumer Goods	tools; furniture; household goods
Sporting Goods	canoes; kayaks; bowling balls; skis
Other	body putty

## **ACMA Total Composites Industry Report Participants**

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AOC

Composites One

INEOS Composites

Interplastic

Johns Manville

\*Jushi

NEG

North American Composites

Owens Corning

Polynt-Reichhold

\* Asterisk indicates data estimated for the current period.