



ACMA Industry Statistics Program Report

First Quarter 2021 - Total Composites* Industry Report

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

Release: May 4, 2020

Compiled by Vault Consulting, LLC



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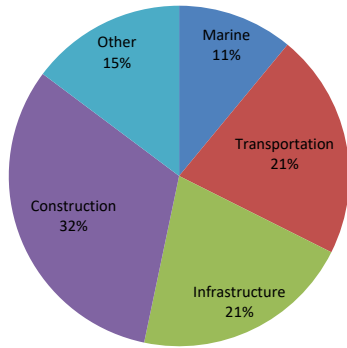
**ACMA Total Composites* Industry Report
First Quarter 2021**

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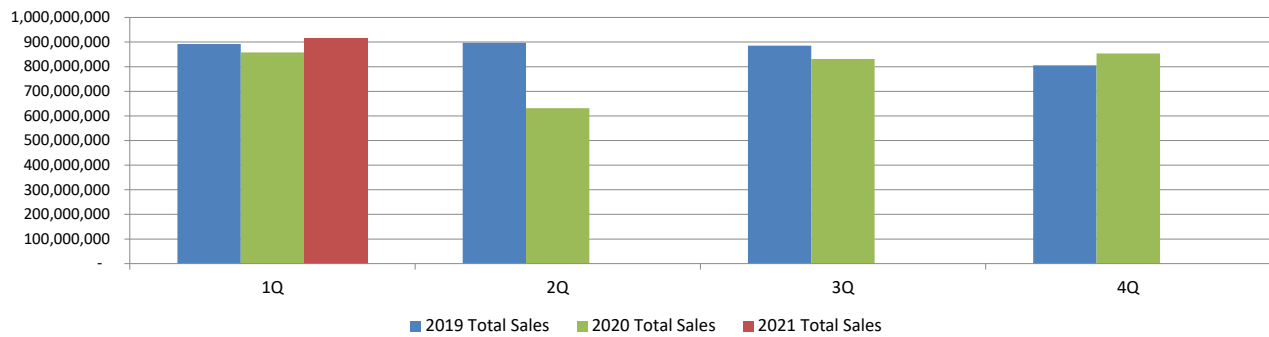
DOMESTIC SALES (US + Canada) POUNDS	1Q 2021	4Q 2020	1Q 2020	1Q 2021 vs 4Q 2020 % Change	1Q 2021 vs 1Q 2020 % Change
Marine	100,532,665	84,559,437	87,128,234	18.9%	15.4%
Transportation	195,889,399	180,220,175	165,166,338	8.7%	18.6%
Infrastructure	191,248,021	195,000,570	213,684,886	-1.9%	-10.5%
Construction	292,191,577	269,401,477	269,899,409	8.5%	8.3%
Other	135,164,575	124,687,790	122,202,151	8.4%	10.6%
TOTAL	915,026,237	853,869,449	858,081,018	7.2%	6.6%

DOMESTIC SALES (US + Canada) POUNDS	2021 YTD	2020 YTD	2021 YTD vs 2020 YTD % Change
Marine	100,532,665	87,128,234	15.4%
Transportation	195,889,399	165,166,338	18.6%
Infrastructure	191,248,021	213,684,886	-10.5%
Construction	292,191,577	269,899,409	8.3%
Other	135,164,575	122,202,151	10.6%
TOTAL	915,026,237	858,081,018	6.6%

Current Year Trends - Domestic Sales (% Breakout)

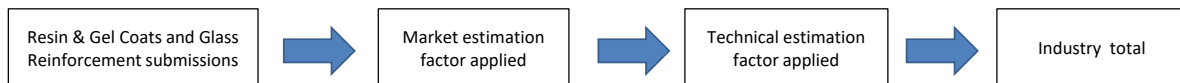


Historical Trends - Domestic Sales (Actual Pounds)



Methodology:

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



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DOMESTIC SALES (US + Canada) POUNDS	1Q 2019	2Q 2019	3Q 2019	4Q 2019	2019 YTD
Marine	94,061,120	95,391,527	87,087,429	80,397,864	94,061,120
Transportation	198,548,729	185,732,569	188,873,086	163,432,900	198,548,729
Infrastructure	229,186,730	232,302,519	235,342,000	212,348,286	229,186,730
Construction	262,405,661	262,775,295	258,165,392	246,870,634	262,405,661
Other	107,883,162	120,896,257	115,524,997	102,298,869	107,883,162
TOTAL	892,085,402	897,098,167	884,992,904	805,348,553	892,085,402

DOMESTIC SALES (US + Canada) POUNDS	1Q 2020	2Q 2020	3Q 2020	4Q 2020	2020 YTD
Marine	87,128,234	54,359,267	84,092,302	84,559,437	87,128,234
Transportation	165,166,338	78,597,572	153,936,214	180,220,175	165,166,338
Infrastructure	213,684,886	178,096,419	202,730,604	195,000,570	213,684,886
Construction	269,899,409	233,224,523	275,816,368	269,401,477	269,899,409
Other	122,202,151	87,396,311	114,821,000	124,687,790	122,202,151
TOTAL	858,081,018	631,674,092	831,396,488	853,869,449	858,081,018

DOMESTIC SALES (US + Canada) POUNDS	1Q 2021	2Q 2021	3Q 2021	4Q 2021	2021 YTD	2021 YTD vs 2020 YTD
Marine	100,532,665				100,532,665	15.4%
Transportation	195,889,399				195,889,399	18.6%
Infrastructure	191,248,021				191,248,021	-10.5%
Construction	292,191,577				292,191,577	8.3%
Other	135,164,575				135,164,575	10.6%
TOTAL	915,026,237				915,026,237	6.6%

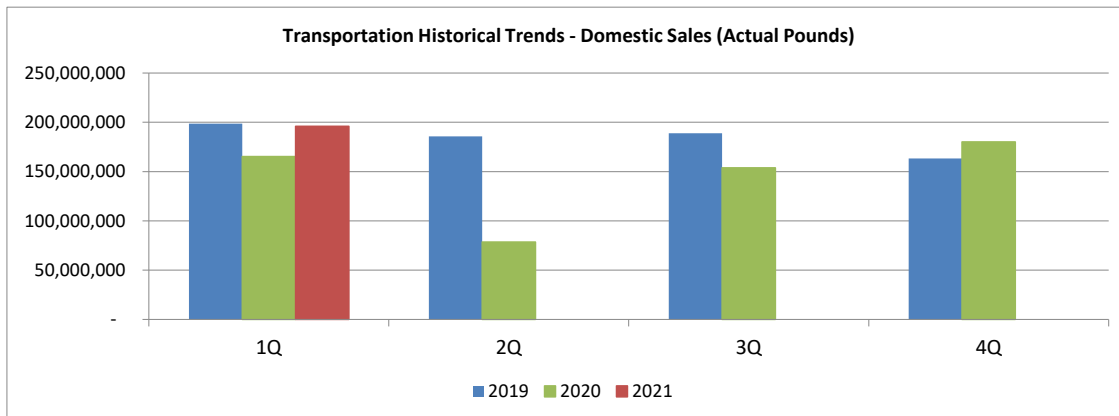
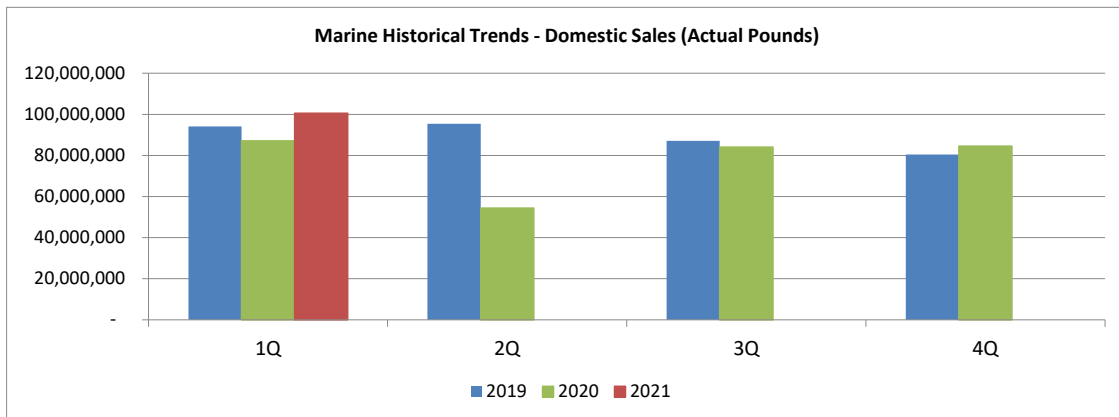
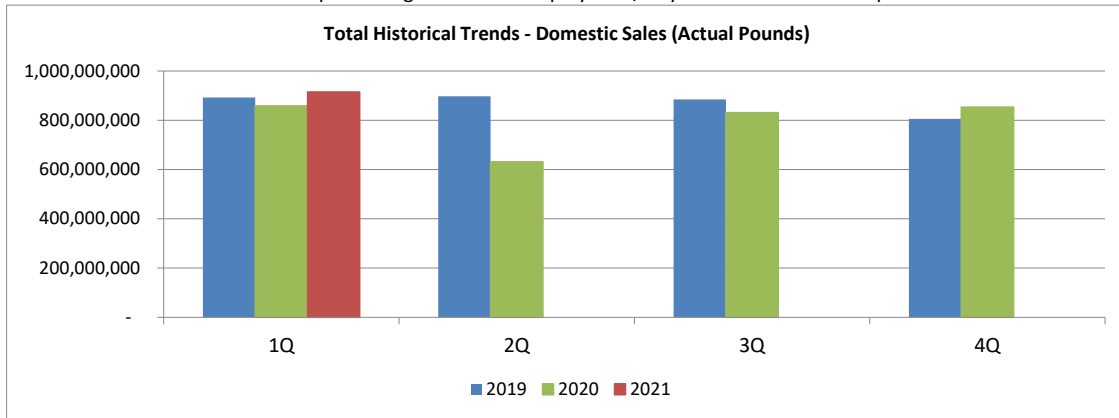
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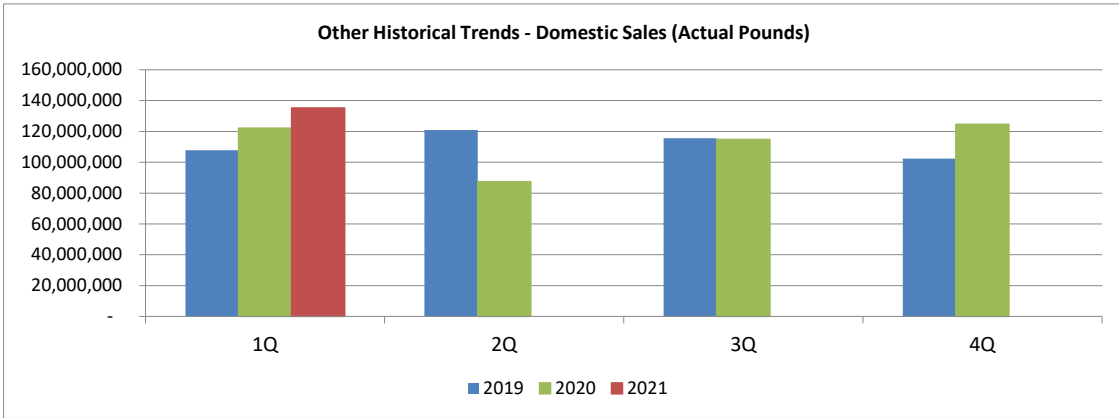
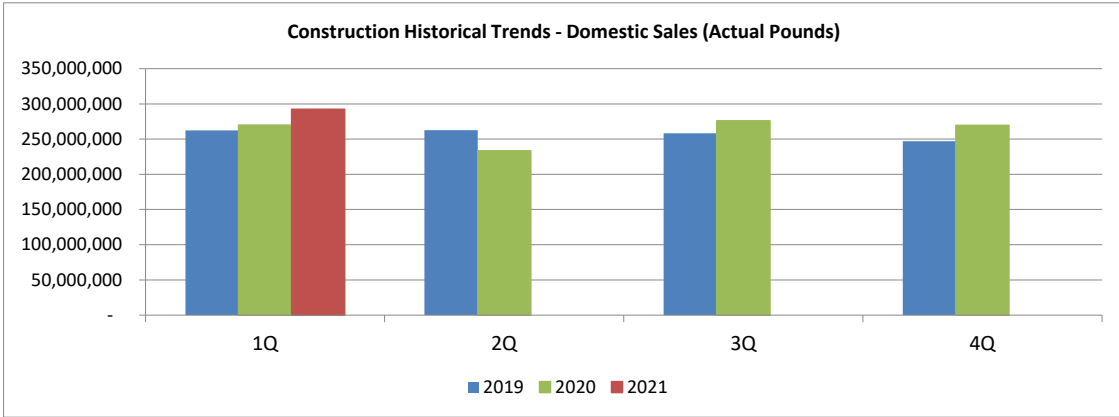
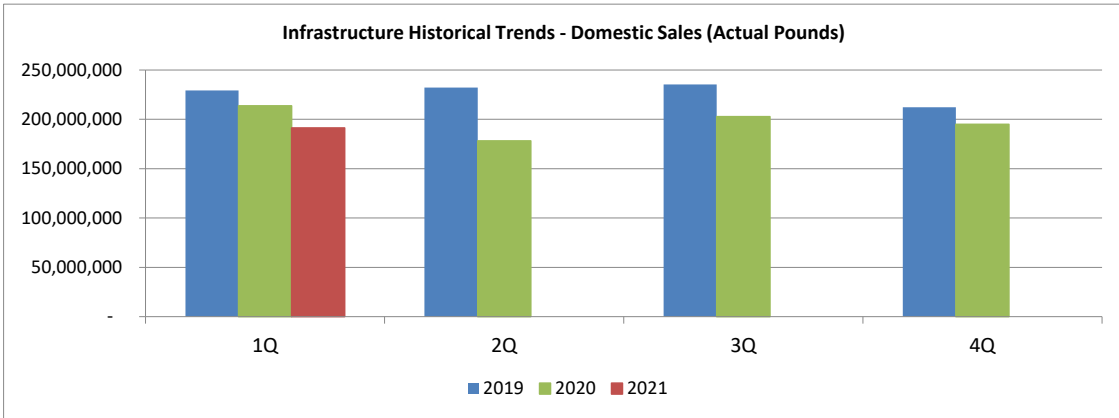
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ACMA Industry Statistics Program Definitions

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

Marine:
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

Transportation:	
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	

ACMA Total Composites Industry Report Participants

AOC

Composites One

INEOS Composites

Interplastic

Johns Manville

Jushi

NEG

North American Composites

Owens Corning

Polynt-Reichhold