

A green line-art icon of a bar chart with three bars of increasing height, enclosed within a hexagonal frame. A green arrow points from the top of the third bar towards the right, pointing towards the main title.

# **PULSE** *OF THE* **INDUSTRY**

**AMERICAN COMPOSITES MANUFACTURERS ASSOCIATION**

## ***ACMA 3Q24 Pulse of the Industry Survey***

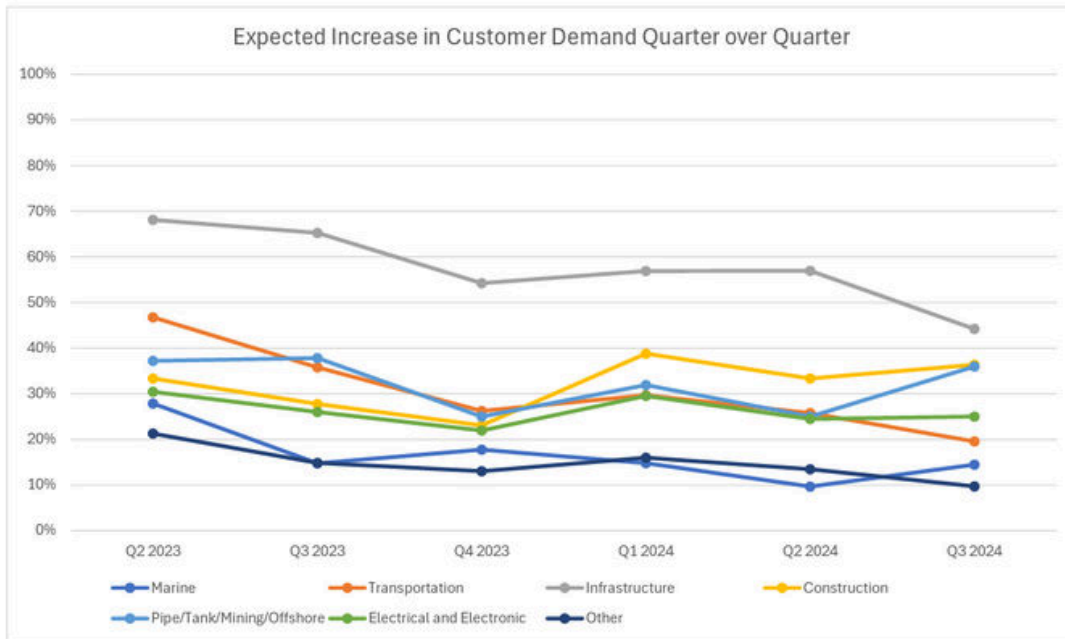
***Vault***

**Release: June 27, 2024**  
**Compiled by Vault Consulting, LLC**

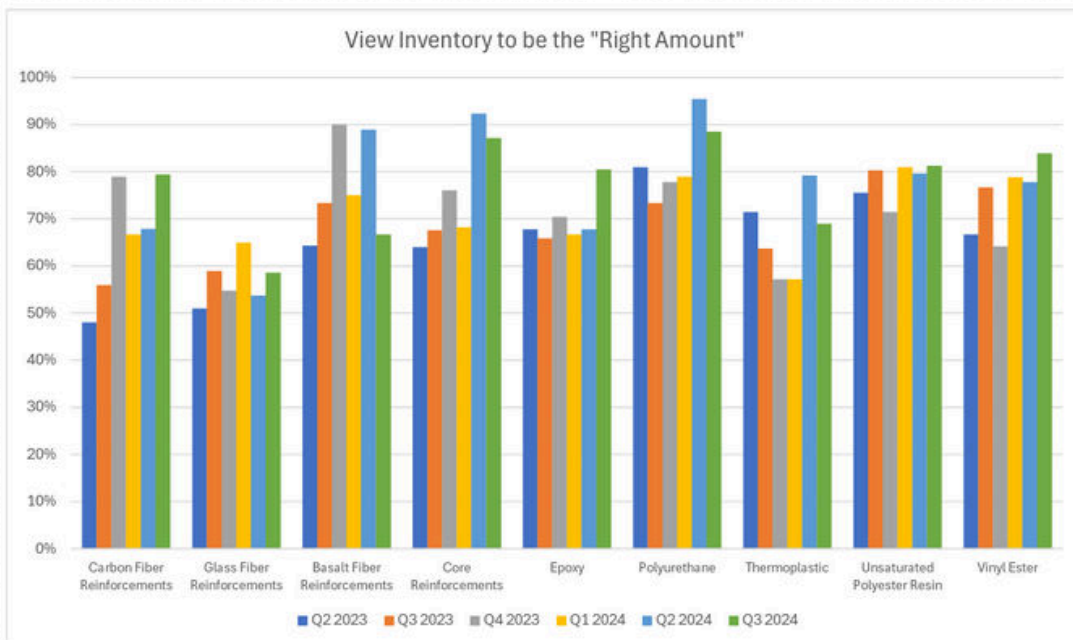
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# Summary of Key Findings

- Expected increases in customer demand have eroded for the Infrastructure and Transportation markets since 2Q23. Infrastructure hit a low of 44% in 3Q24 after reaching a high of 68% in 2Q23, while Transportation went from 46% to 20% during the same timeframe.
- 50% of respondents indicate that customer demand for the Marine market has decreased this quarter.
- While a large majority of respondents report product input lead times have been generally stable over time, these percentages have been relatively volatile. Only polyurethane has been consistently on the rise since 2Q23.
- Over 60% of respondents report product input inventory is at the "right amount" for all products in 3Q24 except glass fiber reinforcements, which is just under 60%. Rather, a third of total respondents report that inventory for GFR is high.
- Hiring & Training, Inflation and Supply Chain Disruption have consistently been the more important topics for respondents over the past year along with Regulation of Styrene albeit at lower levels.

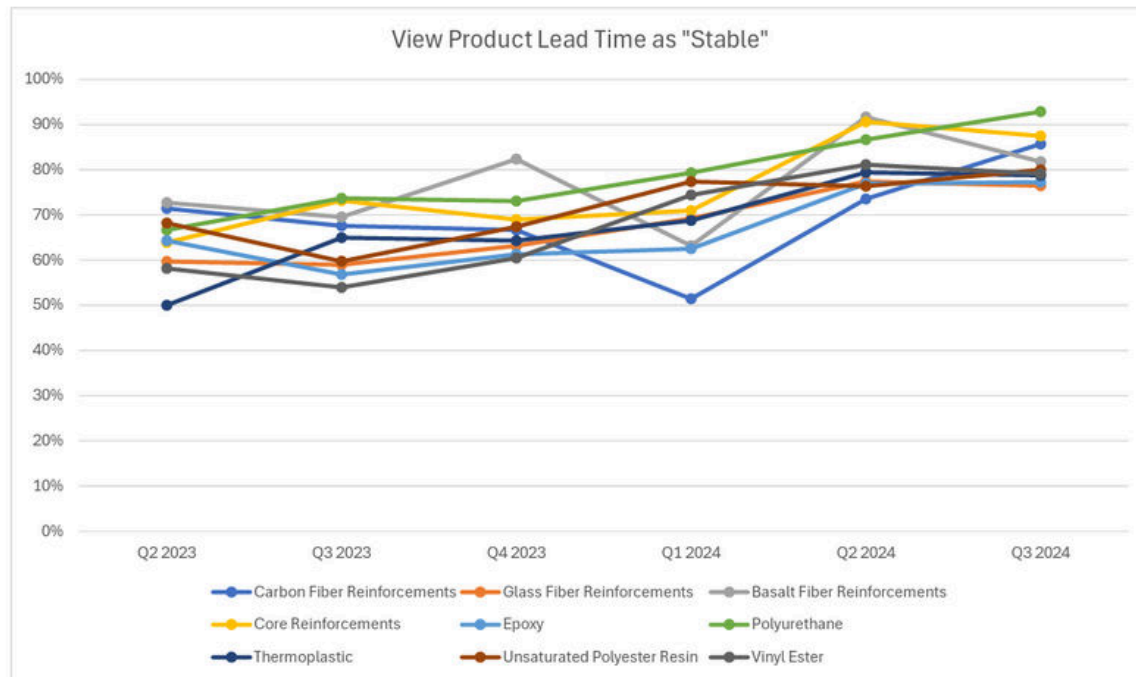


What is the outlook for customer demand in North America in the current quarter compared to the prior quarter for the following markets? Please only answer for markets for which you have knowledge.

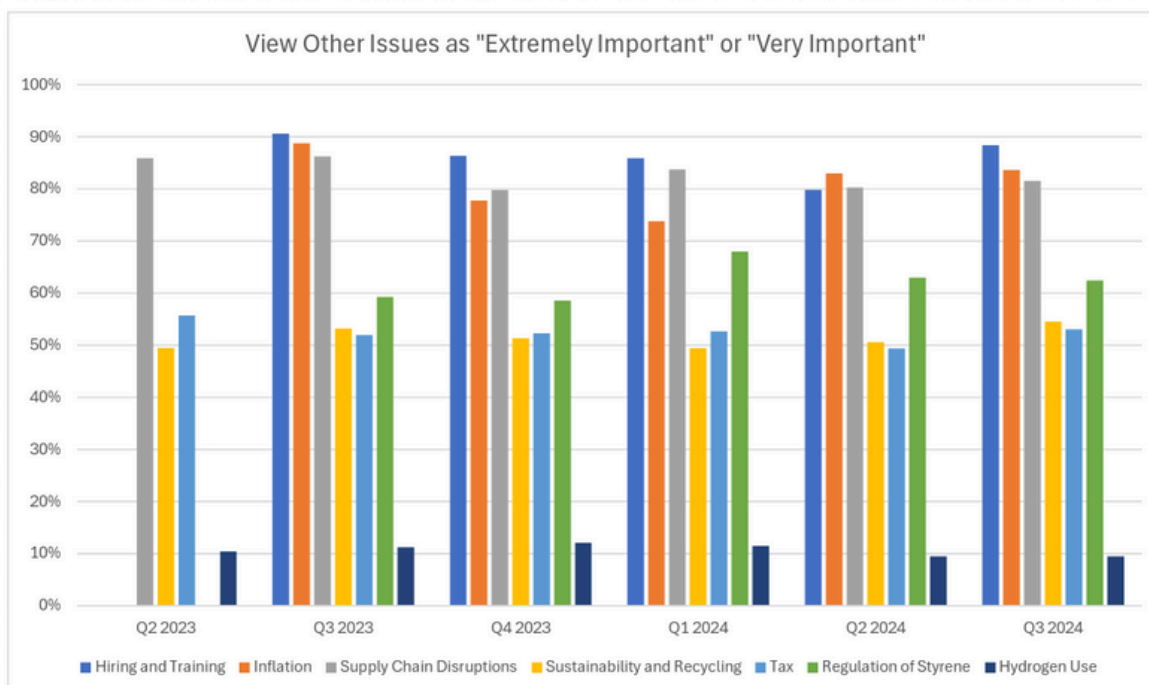


Using a scale of 1 to 5 where "1" means extremely low inventory, "3" means the right amount, and "5" means extremely high inventory, how do you view inventory for the following inputs? Please only answer on products for which you have knowledge.





What is the current lead time for the following inputs? Please only answer for products for which you have knowledge.



Based on what you have read or heard, how important do you consider each of the following issues to your company?



## CUSTOMER DEMAND IN Q3 2024 COMPARED WITH Q2 2024

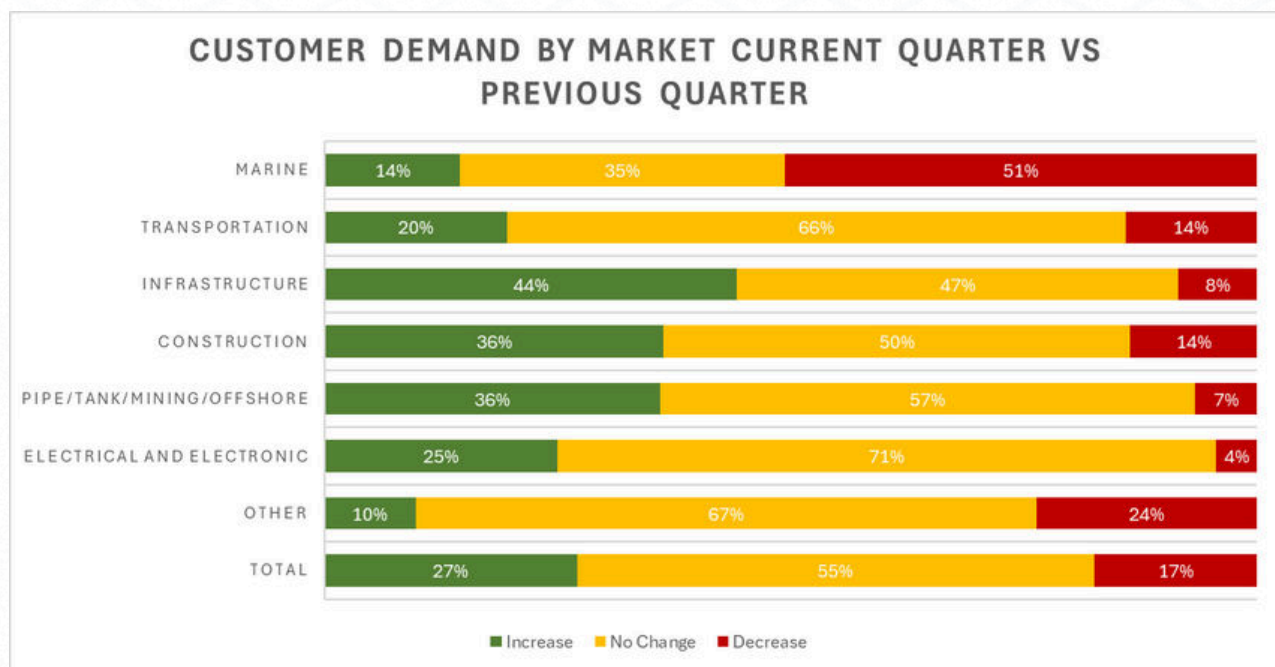


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Overall Market			
Market	Increase	No Change	Decrease
Marine	14%	35%	51%
Transportation	20%	66%	14%
Infrastructure	44%	47%	8%
Construction	36%	50%	14%
Pipe/Tank/Mining/Offshore	36%	57%	7%
Electrical and Electronic	25%	71%	4%
Other	10%	67%	24%
Total	27%	55%	17%

Company Count
79
88
91
84
72
65
69
112

Manufacturer			
Market	Increase	No Change	Decrease
Marine	15%	36%	49%
Transportation	17%	66%	17%
Infrastructure	37%	52%	12%
Construction	34%	49%	17%
Pipe/Tank/Mining/Offshore	29%	59%	12%
Electrical and Electronic	26%	71%	3%
Other	17%	62%	21%
Total	25%	56%	19%

Company Count
47
58
60
53
41
38
42
74

Supplier / Distributor			
Market	Increase	No Change	Decrease
Marine	13%	28%	59%
Transportation	23%	67%	10%
Infrastructure	58%	39%	3%
Construction	39%	52%	10%
Pipe/Tank/Mining/Offshore	45%	55%	0%
Electrical and Electronic	22%	74%	4%
Other	0%	70%	30%
Total	29%	54%	17%

Company Count
32
30
31
31
31
27
27
32

Affiliate			
Market	Increase	No Change	Decrease
Marine	25%	75%	0%
Transportation	25%	75%	0%
Infrastructure	50%	50%	0%
Construction	50%	50%	0%
Pipe/Tank/Mining/Offshore	33%	67%	0%
Electrical and Electronic	33%	33%	33%
Other	0%	100%	0%
Total	32%	64%	4%

Company Count
4
4
4
4
3
3
3
6

### Small: 1 - 10 Employees

Market	Increase	No Change	Decrease
Marine	25%	75%	0%
Transportation	25%	75%	0%
Infrastructure	33%	67%	0%
Construction	60%	20%	20%
Pipe/Tank/Mining/Offshore	33%	67%	0%
Electrical and Electronic	0%	67%	33%
Other	25%	75%	0%
<b>Total</b>	<b>31%</b>	<b>62%</b>	<b>7%</b>

Company Count
4
4
6
5
3
3
4
<b>8</b>

### Medium: 11 - 100 Employees

Market	Increase	No Change	Decrease
Marine	20%	53%	27%
Transportation	21%	64%	14%
Infrastructure	44%	44%	11%
Construction	38%	56%	6%
Pipe/Tank/Mining/Offshore	31%	54%	15%
Electrical and Electronic	33%	56%	11%
Other	27%	73%	0%
<b>Total</b>	<b>31%</b>	<b>56%</b>	<b>13%</b>

Company Count
15
14
18
16
13
9
11
<b>21</b>

### Large: 101+ Employees

Market	Increase	No Change	Decrease
Marine	13%	28%	59%
Transportation	19%	66%	15%
Infrastructure	45%	46%	8%
Construction	34%	51%	15%
Pipe/Tank/Mining/Offshore	37%	58%	5%
Electrical and Electronic	25%	73%	2%
Other	5%	65%	30%
<b>Total</b>	<b>26%</b>	<b>55%</b>	<b>19%</b>

Company Count
64
74
71
67
59
56
57
<b>83</b>

Survey Question: What is the outlook for customer demand in North America in the current quarter compared to the prior quarter for the following markets? Please only answer for markets for which you have knowledge.

\*Darker shading represents the higher responses by market segment. Shading does not represent statistical significance.



## Customer Demand in North American Year Over Year

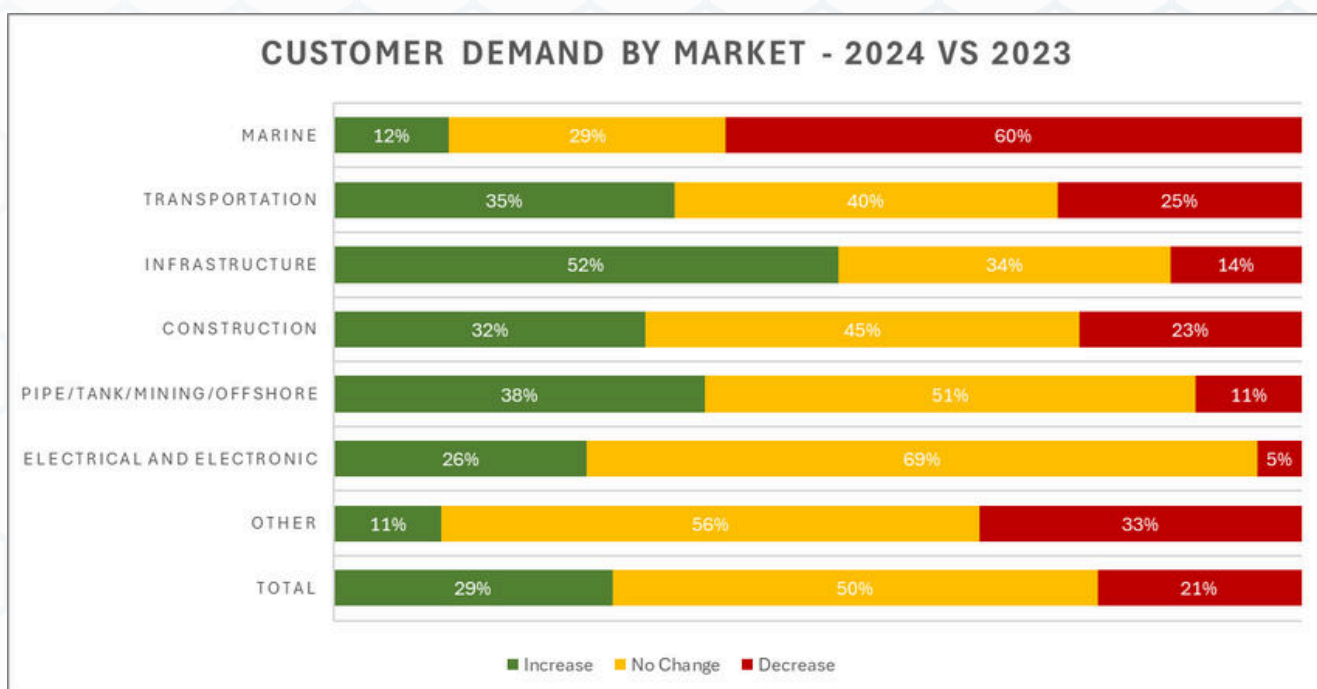


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Overall Market			
Market	Increase	No Change	Decrease
Marine	12%	29%	60%
Transportation	35%	40%	25%
Infrastructure	52%	34%	14%
Construction	32%	45%	23%
Pipe/Tank/Mining/Offshore	38%	51%	11%
Electrical and Electronic	26%	69%	5%
Other	11%	56%	33%
<b>Total</b>	<b>29%</b>	<b>50%</b>	<b>21%</b>

Company Count
80
87
92
84
70
62
69
<b>112</b>

Manufacturer			
Market	Increase	No Change	Decrease
Marine	17%	31%	52%
Transportation	35%	39%	26%
Infrastructure	52%	35%	13%
Construction	31%	46%	22%
Pipe/Tank/Mining/Offshore	36%	51%	13%
Electrical and Electronic	29%	66%	5%
Other	19%	50%	31%
<b>Total</b>	<b>32%</b>	<b>44%</b>	<b>24%</b>

Company Count
48
57
60
54
39
38
42
<b>74</b>

Supplier / Distributor			
Market	Increase	No Change	Decrease
Marine	3%	22%	75%
Transportation	30%	43%	27%
Infrastructure	53%	31%	16%
Construction	33%	40%	27%
Pipe/Tank/Mining/Offshore	42%	48%	10%
Electrical and Electronic	17%	79%	4%
Other	0%	63%	37%
<b>Total</b>	<b>26%</b>	<b>45%</b>	<b>29%</b>

Company Count
32
30
32
30
31
24
27
<b>32</b>

Affiliate			
Market	Increase	No Change	Decrease
Marine	25%	50%	25%
Transportation	75%	25%	0%
Infrastructure	50%	50%	0%
Construction	33%	67%	0%
Pipe/Tank/Mining/Offshore	33%	67%	0%
Electrical and Electronic	67%	33%	0%
Other	0%	67%	33%
<b>Total</b>	<b>42%</b>	<b>50%</b>	<b>8%</b>

Company Count
4
4
4
3
3
3
3
<b>6</b>

### Small: 1 - 10 Employees

Market	Increase	No Change	Decrease
Marine	50%	25%	25%
Transportation	75%	25%	0%
Infrastructure	33%	50%	17%
Construction	60%	20%	20%
Pipe/Tank/Mining/Offshore	33%	67%	0%
Electrical and Electronic	67%	33%	0%
Other	25%	50%	25%
<b>Total</b>	<b>48%</b>	<b>38%</b>	<b>14%</b>

Company Count
4
4
6
5
3
3
4
<b>8</b>

### Medium: 11 - 100 Employees

Market	Increase	No Change	Decrease
Marine	19%	44%	38%
Transportation	36%	57%	7%
Infrastructure	42%	42%	16%
Construction	44%	38%	19%
Pipe/Tank/Mining/Offshore	31%	54%	15%
Electrical and Electronic	22%	67%	11%
Other	30%	70%	0%
<b>Total</b>	<b>33%</b>	<b>51%</b>	<b>16%</b>

Company Count
16
14
19
16
13
9
10
<b>21</b>

### Large: 101+ Employees

Market	Increase	No Change	Decrease
Marine	8%	25%	67%
Transportation	33%	37%	30%
Infrastructure	56%	31%	13%
Construction	27%	48%	24%
Pipe/Tank/Mining/Offshore	40%	49%	11%
Electrical and Electronic	25%	72%	4%
Other	7%	53%	40%
<b>Total</b>	<b>29%</b>	<b>44%</b>	<b>27%</b>

Company Count
64
73
71
66
57
53
58
<b>83</b>

**Survey Question: What is the outlook for customer demand in North America in 2024 compared to 2023 in the following markets? Please only answer for markets for which you have knowledge.**

\*Darker shading represents the higher responses by market segment. Shading does not represent statistical significance.



## Current Product Lead Time

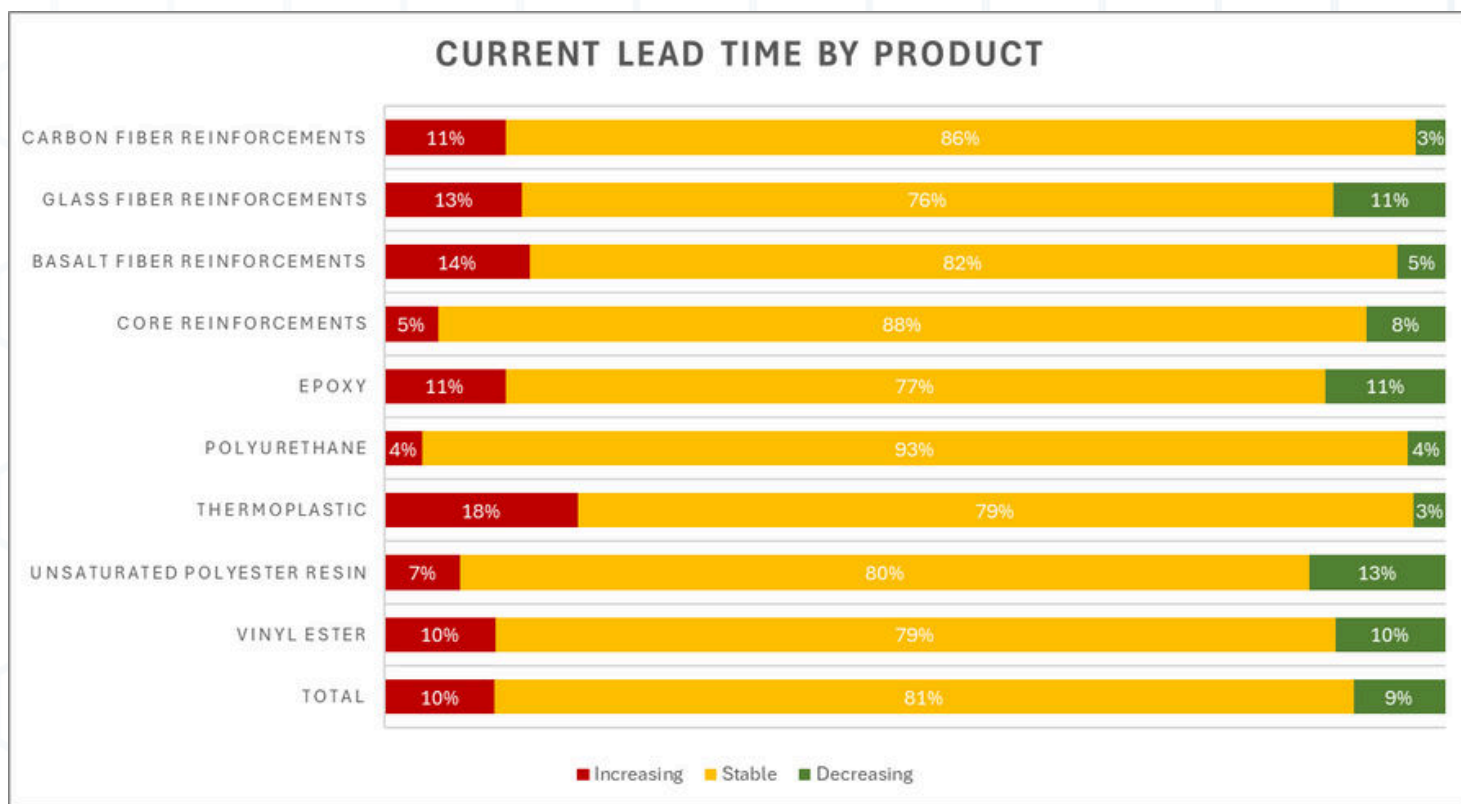


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Overall			
Product	Increasing	Stable	Decreasing
Carbon Fiber Reinforcements	11%	86%	3%
Glass Fiber Reinforcements	13%	76%	11%
Basalt Fiber Reinforcements	14%	82%	5%
Core Reinforcements	5%	88%	8%
Epoxy	11%	77%	11%
Polyurethane	4%	93%	4%
Thermoplastic	18%	79%	3%
Unsaturated Polyester Resin	7%	80%	13%
Vinyl Ester	10%	79%	10%
Total	10%	81%	9%

Company Count
33
83
20
38
42
26
31
68
65
100

Manufacturer			
Product	Increasing	Stable	Decreasing
Carbon Fiber Reinforcements	17%	83%	0%
Glass Fiber Reinforcements	15%	77%	8%
Basalt Fiber Reinforcements	0%	90%	10%
Core Reinforcements	7%	86%	7%
Epoxy	17%	73%	10%
Polyurethane	0%	100%	0%
Thermoplastic	23%	73%	5%
Unsaturated Polyester Resin	9%	80%	11%
Vinyl Ester	14%	77%	9%
Total	12%	80%	8%

Company Count
18
61
10
28
30
17
22
46
43
67

Supplier / Distributor			
Product	Increasing	Stable	Decreasing
Carbon Fiber Reinforcements	7%	87%	7%
Glass Fiber Reinforcements	9%	73%	18%
Basalt Fiber Reinforcements	30%	70%	0%
Core Reinforcements	0%	90%	10%
Epoxy	0%	83%	17%
Polyurethane	11%	78%	11%
Thermoplastic	11%	89%	0%
Unsaturated Polyester Resin	5%	77%	18%
Vinyl Ester	5%	82%	14%
Total	8%	80%	12%

Company Count
15
22
10
10
12
9
9
22
22
31

Affiliate			
Product	Increasing	Stable	Decreasing
Carbon Fiber Reinforcements	0%	100%	0%
Glass Fiber Reinforcements	0%	100%	0%
Basalt Fiber Reinforcements	0%	100%	0%
Core Reinforcements	0%	100%	0%
Epoxy	0%	100%	0%
Polyurethane	0%	100%	0%
Thermoplastic	0%	100%	0%
Unsaturated Polyester Resin	0%	100%	0%
Vinyl Ester	0%	100%	0%
Total	0%	100%	0%

Company Count
2
2
2
2
2
2
2
2
2
2

### Small: 1 - 10 Employees

Product	Increasing	Stable	Decreasing
Carbon Fiber Reinforcements	0%	100%	0%
Glass Fiber Reinforcements	50%	25%	25%
Basalt Fiber Reinforcements	0%	100%	0%
Core Reinforcements	0%	67%	33%
Epoxy	33%	67%	0%
Polyurethane	0%	100%	0%
Thermoplastic	0%	50%	50%
Unsaturated Polyester Resin	50%	50%	0%
Vinyl Ester	33%	33%	33%
Total	24%	57%	19%

Company Count
2
4
1
3
3
1
2
2
3
4

### Medium: 11-100 Employees

Product	Increasing	Stable	Decreasing
Carbon Fiber Reinforcements	33%	67%	0%
Glass Fiber Reinforcements	13%	81%	6%
Basalt Fiber Reinforcements	0%	100%	0%
Core Reinforcements	10%	80%	10%
Epoxy	14%	71%	14%
Polyurethane	17%	83%	0%
Thermoplastic	50%	50%	0%
Unsaturated Polyester Resin	21%	79%	0%
Vinyl Ester	33%	67%	0%
Total	20%	76%	4%

Company Count
6
16
4
10
7
6
4
14
12
18

### Large: 101+ Employees

Product	Increasing	Stable	Decreasing
Carbon Fiber Reinforcements	7%	89%	4%
Glass Fiber Reinforcements	11%	78%	11%
Basalt Fiber Reinforcements	18%	76%	6%
Core Reinforcements	4%	93%	4%
Epoxy	9%	79%	12%
Polyurethane	0%	95%	5%
Thermoplastic	15%	85%	0%
Unsaturated Polyester Resin	2%	81%	17%
Vinyl Ester	4%	85%	12%
Total	7%	84%	9%

Company Count
27
65
17
27
34
21
27
54
52
78

Survey Question: What is the current lead time for the following inputs? Please only answer for products for which you have knowledge.

\*Darker shading represents the higher responses by market segment. Shading does not represent statistical significance.



## Current Inventory

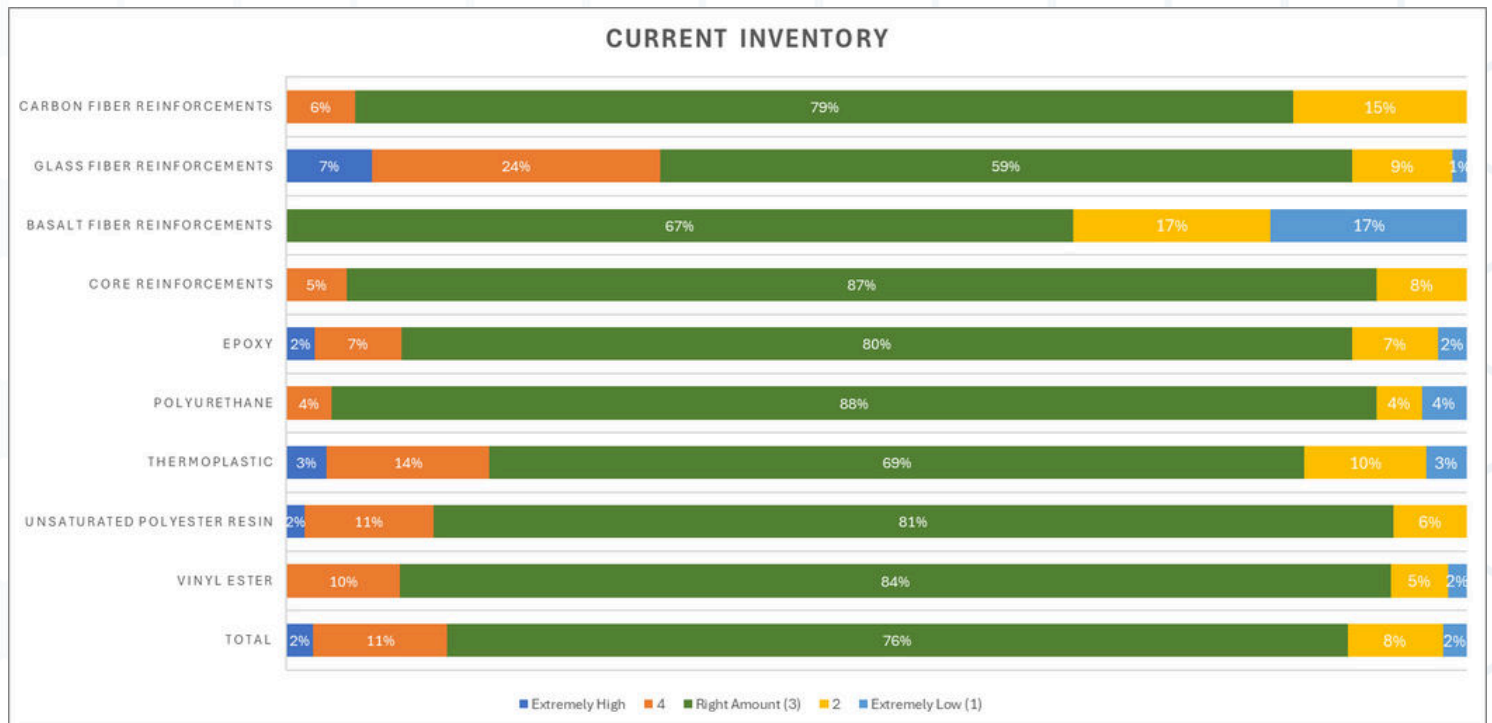


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Overall					
Product	Extremely High	4	Right Amount (3)	2	Extremely Low (1)
Carbon Fiber Reinforcements	0%	6%	79%	15%	0%
Glass Fiber Reinforcements	7%	24%	59%	9%	1%
Basalt Fiber Reinforcements	0%	0%	67%	17%	17%
Core Reinforcements	0%	5%	87%	8%	0%
Epoxy	2%	7%	80%	7%	2%
Polyurethane	0%	4%	88%	4%	4%
Thermoplastic	3%	14%	69%	10%	3%
Unsaturated Polyester Resin	2%	11%	81%	6%	0%
Vinyl Ester	0%	10%	84%	5%	2%
Total	2%	11%	76%	8%	2%

\*Total based on Manufacturer and Supplier / Distributor responses only.

Company Count
34
82
18
39
41
26
29
64
62
100

Manufacturer					
Product	Extremely High	4	Right Amount (3)	2	Extremely Low (1)
Carbon Fiber Reinforcements	0%	0%	82%	18%	0%
Glass Fiber Reinforcements	2%	18%	69%	10%	2%
Basalt Fiber Reinforcements	0%	0%	70%	10%	20%
Core Reinforcements	0%	3%	90%	7%	0%
Epoxy	3%	7%	80%	7%	3%
Polyurethane	0%	0%	94%	0%	6%
Thermoplastic	5%	14%	67%	10%	5%
Unsaturated Polyester Resin	0%	7%	84%	9%	0%
Vinyl Ester	0%	7%	83%	7%	2%
Total	1%	8%	79%	9%	3%

Company Count
22
61
10
30
30
18
21
43
41
69

Supplier / Distributor					
Product	Extremely High	4	Right Amount (3)	2	Extremely Low (1)
Carbon Fiber Reinforcements	0%	17%	75%	8%	0%
Glass Fiber Reinforcements	24%	43%	29%	5%	0%
Basalt Fiber Reinforcements	0%	0%	63%	25%	13%
Core Reinforcements	0%	11%	78%	11%	0%
Epoxy	0%	9%	82%	9%	0%
Polyurethane	0%	13%	75%	13%	0%
Thermoplastic	0%	13%	75%	13%	0%
Unsaturated Polyester Resin	5%	19%	76%	0%	0%
Vinyl Ester	0%	14%	86%	0%	0%
Total	5%	18%	69%	7%	1%

Company Count
12
21
8
9
11
8
8
21
21
31

Affiliate					
Product	Extremely High	4	Right Amount (3)	2	Extremely Low (1)
Carbon Fiber Reinforcements	0%	0%	100%	0%	0%
Glass Fiber Reinforcements	0%	0%	100%	0%	0%
Basalt Fiber Reinforcements	0%	0%	100%	0%	0%
Core Reinforcements	0%	0%	100%	0%	0%
Epoxy	0%	0%	100%	0%	0%
Polyurethane	0%	0%	100%	0%	0%
Thermoplastic	0%	0%	100%	0%	0%
Unsaturated Polyester Resin	0%	0%	100%	0%	0%
Vinyl Ester	0%	0%	100%	0%	0%
Total	0%	0%	100%	0%	0%

Company Count
2
2
2
2
2
2
2
2
2
2

#### Small: 1 - 10 Employees

Product	Extremely High	4	Right Amount (3)	2	Extremely Low (1)
Carbon Fiber Reinforcements	0%	0%	67%	33%	0%
Glass Fiber Reinforcements	0%	0%	67%	33%	0%
Basalt Fiber Reinforcements	0%	0%	50%	0%	50%
Core Reinforcements	0%	0%	67%	33%	0%
Epoxy	0%	0%	100%	0%	0%
Polyurethane	0%	0%	100%	0%	0%
Thermoplastic	0%	0%	100%	0%	0%
Unsaturated Polyester Resin	0%	0%	100%	0%	0%
Vinyl Ester	0%	0%	100%	0%	0%
Total	0%	0%	81%	14%	5%

Company Count
3
3
2
3
3
1
1
2
3
4

#### Medium: 11 - 100 Employees

Product	Extremely High	4	Right Amount (3)	2	Extremely Low (1)
Carbon Fiber Reinforcements	0%	0%	67%	33%	0%
Glass Fiber Reinforcements	13%	7%	67%	13%	0%
Basalt Fiber Reinforcements	0%	0%	75%	0%	25%
Core Reinforcements	0%	0%	89%	11%	0%
Epoxy	0%	0%	83%	17%	0%
Polyurethane	0%	0%	83%	17%	0%
Thermoplastic	0%	0%	25%	50%	25%
Unsaturated Polyester Resin	8%	8%	83%	0%	0%
Vinyl Ester	0%	18%	73%	9%	0%
Total	4%	5%	74%	14%	3%

Company Count
6
15
4
9
6
6
4
12
11
18

#### Large: 101+ Employees

Product	Extremely High	4	Right Amount (3)	2	Extremely Low (1)
Carbon Fiber Reinforcements	0%	7%	85%	7%	0%
Glass Fiber Reinforcements	6%	29%	58%	6%	2%
Basalt Fiber Reinforcements	0%	0%	71%	21%	7%
Core Reinforcements	0%	7%	90%	3%	0%
Epoxy	3%	9%	79%	6%	3%
Polyurethane	0%	5%	90%	0%	5%
Thermoplastic	4%	15%	77%	4%	0%
Unsaturated Polyester Resin	0%	12%	81%	8%	0%
Vinyl Ester	0%	8%	86%	4%	2%
Total	2%	13%	78%	6%	2%

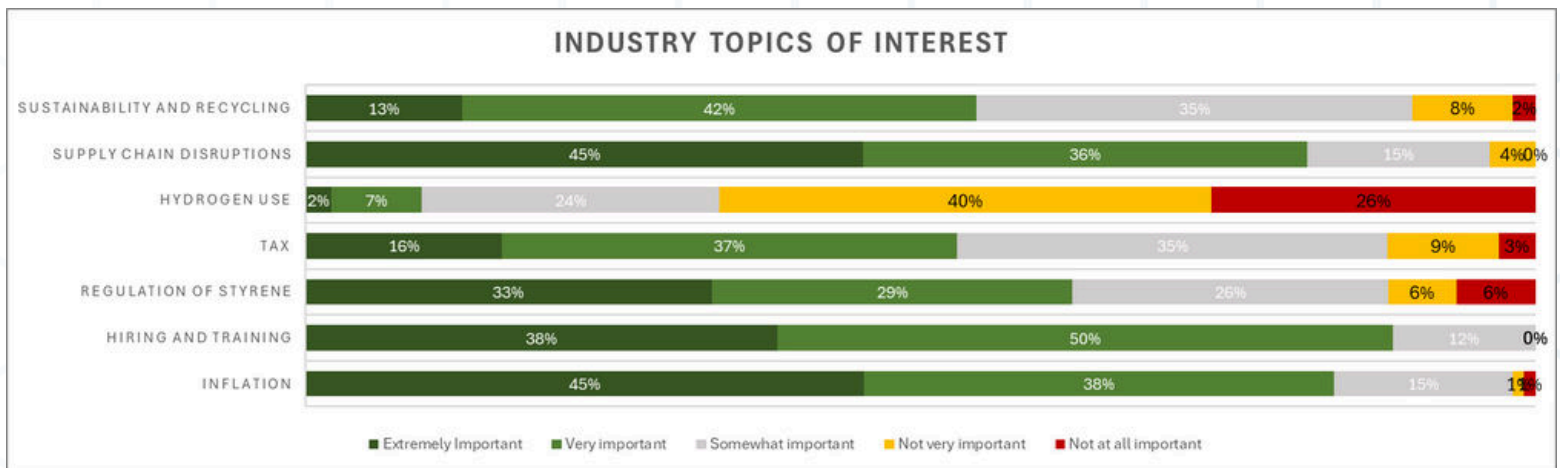
Company Count
27
66
14
29
34
21
26
52
50
80

**Survey Question:** Using a scale of 1 to 5 where “1” means extremely low inventory, “3” means the right amount, and “5” means extremely high inventory, how do you view inventory for the following inputs? Please only answer on products for which you have knowledge.

\*Darker shading represents the higher responses by market segment. Shading does not represent statistical significance.



## Industry Topics of Interest



### Top Two Topics of Interest

Topic	Percent Very or Extremely Important
Hiring and Training	21.11%
Inflation	19.62%

\*Top Two Topics calculated as the highest percentage of very or extremely important topics out of all very or extremely important responses.

Table continued on next page

Overall					
Topic	Extremely Important	Very important	Somewhat important	Not very important	Not at all important
Sustainability and Recycling	13%	42%	35%	8%	2%
Supply Chain Disruptions	45%	36%	15%	4%	0%
Hydrogen Use	2%	7%	24%	40%	26%
Tax	16%	37%	35%	9%	3%
Regulation of Styrene	33%	29%	26%	6%	6%
Hiring and Training	38%	50%	12%	0%	0%
Inflation	45%	38%	15%	1%	1%

Company Count
110
108
95
100
109
112
110

Manufacturer					
Topic	Extremely Important	Very important	Somewhat important	Not very important	Not at all important
Sustainability and Recycling	11%	39%	38%	9%	3%
Supply Chain Disruptions	49%	32%	14%	5%	0%
Hydrogen Use	2%	10%	25%	35%	29%
Tax	19%	37%	34%	7%	3%
Regulation of Styrene	34%	26%	26%	5%	8%
Hiring and Training	45%	42%	14%	0%	0%
Inflation	49%	35%	16%	0%	0%

Company Count
74
73
63
68
73
74
74

Supplier / Distributor					
Topic	Extremely Important	Very important	Somewhat important	Not very important	Not at all important
Sustainability and Recycling	20%	50%	27%	3%	0%
Supply Chain Disruptions	42%	42%	16%	0%	0%
Hydrogen Use	4%	4%	18%	54%	21%
Tax	7%	41%	38%	14%	0%
Regulation of Styrene	34%	34%	25%	3%	3%
Hiring and Training	26%	65%	10%	0%	0%
Inflation	39%	45%	10%	3%	3%

Company Count
30
31
28
29
32
31
31

Affiliate					
Topic	Extremely Important	Very important	Somewhat important	Not very important	Not at all important
Sustainability and Recycling	0%	33%	50%	17%	0%
Supply Chain Disruptions	0%	75%	25%	0%	0%
Hydrogen Use	0%	0%	50%	25%	25%
Tax	33%	0%	33%	0%	33%
Regulation of Styrene	0%	50%	25%	25%	0%
Hiring and Training	29%	71%	0%	0%	0%
Inflation	40%	40%	20%	0%	0%

Company Count
6
4
4
3
4
7
5

#### Small: 1 - 10 Employees

Topic	Extremely Important	Very important	Somewhat important	Not very important	Not at all important
Sustainability and Recycling	0%	25%	38%	25%	13%
Supply Chain Disruptions	43%	29%	14%	14%	0%
Hydrogen Use	0%	0%	29%	14%	57%
Tax	33%	17%	33%	0%	17%
Regulation of Styrene	0%	43%	14%	29%	14%
Hiring and Training	33%	56%	11%	0%	0%
Inflation	50%	25%	25%	0%	0%

Company Count
8
7
7
6
7
9
8

#### Medium: 11 - 100 Employees

Topic	Extremely Important	Very important	Somewhat important	Not very important	Not at all important
Sustainability and Recycling	11%	32%	37%	21%	0%
Supply Chain Disruptions	42%	32%	26%	0%	0%
Hydrogen Use	7%	0%	13%	53%	27%
Tax	21%	42%	32%	5%	0%
Regulation of Styrene	32%	37%	21%	11%	0%
Hiring and Training	40%	50%	10%	0%	0%
Inflation	60%	30%	5%	0%	5%

Company Count
19
19
15
19
19
20
20

#### Large: 101+ Employees

Topic	Extremely Important	Very important	Somewhat important	Not very important	Not at all important
Sustainability and Recycling	14%	46%	35%	4%	1%
Supply Chain Disruptions	46%	38%	12%	4%	0%
Hydrogen Use	1%	10%	26%	40%	23%
Tax	13%	37%	36%	11%	3%
Regulation of Styrene	36%	27%	28%	2%	7%
Hiring and Training	39%	49%	12%	0%	0%
Inflation	41%	41%	16%	1%	0%

Company Count
83
82
73
75
83
83
82

**Survey Question:** Based on what you have read and heard, how important do you consider each of the following issues to your company?

\*Darker shading represents the higher responses by market segment. Shading does not represent statistical significance.

#### Other Industry Topics of Interest

Topic	Count
Impact of subsidized Chinese exports of raw material and FRP parts	1
Geopolitical risks	1
Election Year	2
Tariffs	1

Based on what you have seen or heard, how important do you consider each of the issues to your company? If other, please specify



# Background:

**Purpose:**

The purpose of the survey is to gauge perceptions about how the composites industry is performing over time. Published data from the survey will allow members to assess how their company's markets and inputs are trending relative to the overall composites industry; and enable ACMA to identify hot topics in the composites industry for which the association should be engaged on behalf of its members.

ACMA will also use the survey to gauge the perceived value of association membership and identify any strengths and areas for improvement.

**Survey Objectives:**

To assess perceptions of end market segments over the next quarter and next 9 months  
To determine the size of composites inputs inventory  
To identify issues that members perceive to be important in the composites industry

**Survey Methodology:**

The survey is conducted on a **quarterly** basis among members of ACMA.  
The survey takes approximately **5 minutes** to complete and remain in the field for roughly two weeks.  
Vault Consulting will distribute the survey each quarter and will be responsible for collecting, aggregating, and reporting results each quarter. Reports will be published roughly two weeks after fieldwork closes.

**Sample sizes for the current quarter were as follows:**

Total Respondents 113  
Manufacturers 74  
Supplier/Distributor 32  
Affiliates 7

Data collection was conducted between 6/7/2024 - 6/21/2024.

For more information on this survey or how to participate please contact Paige Patterson at [ppatterson@acmanet.org](mailto:ppatterson@acmanet.org)