



ACMA Industry Statistics Program Report

Q1 & Q2- Total Composites Industry Report

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

Released: August 20, 2024

Compiled by Vault Consulting, LLC



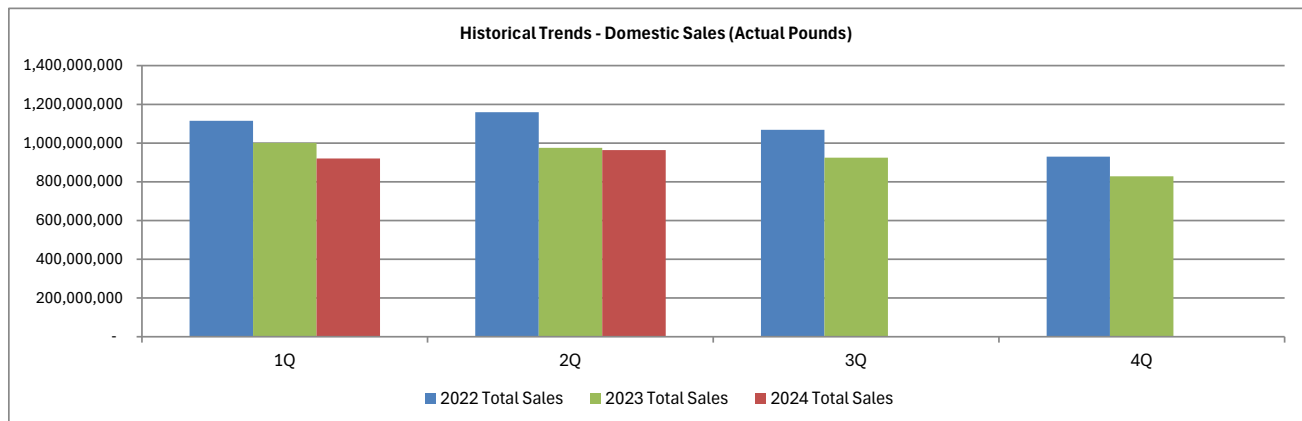
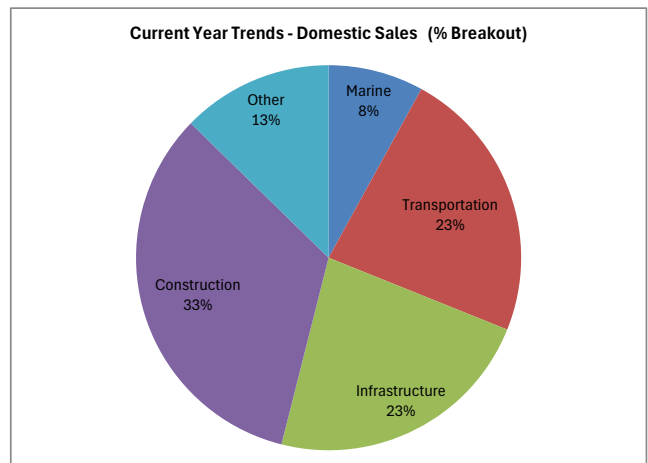
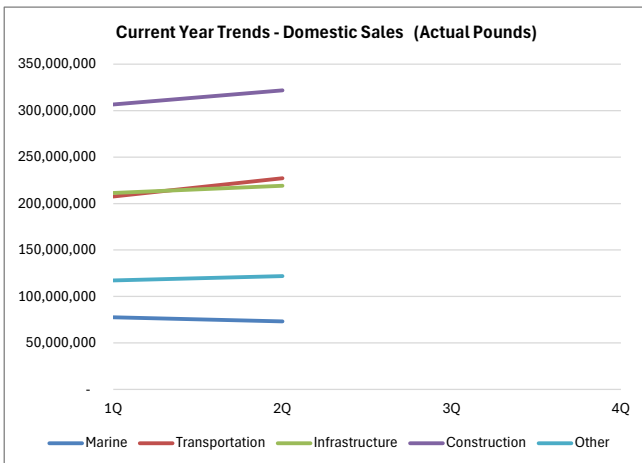
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ACMA Total Composites Industry Report Q1 & Q2 2024

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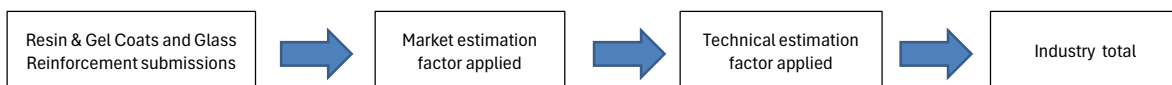
DOMESTIC SALES (US + Canada) POUNDS	2Q 2024	1Q 2024	2Q 2023	2Q 2024 vs 1Q 2024 % Change	2Q 2024 vs 2Q 2023 % Change
Marine	73,183,875	77,608,665	93,823,266	-5.7%	-22.0%
Transportation	227,243,941	207,612,768	211,967,705	9.5%	7.2%
Infrastructure	219,153,071	211,391,758	246,473,121	3.7%	-11.1%
Construction	321,820,592	306,645,269	289,242,686	4.9%	11.3%
Other	121,940,209	117,276,999	133,659,231	4.0%	-8.8%
TOTAL	963,341,688	920,535,459	975,166,009	4.7%	-1.2%

DOMESTIC SALES (US + Canada) POUNDS	2024 YTD	2023 YTD	2024 YTD vs 2023 YTD % Change
Marine	150,792,540	199,073,365	-24.3%
Transportation	434,856,709	432,577,157	0.5%
Infrastructure	430,544,829	487,592,966	-11.7%
Construction	628,465,861	586,624,748	7.1%
Other	239,217,208	270,257,958	-11.5%
TOTAL	1,883,877,147	1,976,126,194	-4.7%



Methodology:

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



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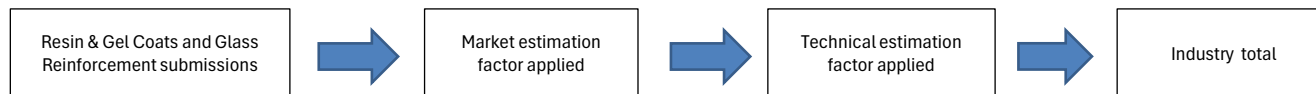
DOMESTIC SALES (US + Canada) POUNDS	1Q 2022	2Q 2022	3Q 2022	4Q 2022	2022 YTD
Marine	102,110,796	107,703,826	93,357,032	91,862,144	209,814,622
Transportation	247,023,880	259,508,202	240,034,313	194,897,963	506,532,082
Infrastructure	246,663,097	258,097,985	249,903,720	225,672,286	504,761,082
Construction	361,510,834	372,696,015	345,582,261	294,211,052	734,206,849
Other	157,891,063	161,782,165	139,753,415	123,445,516	319,673,228
TOTAL	1,115,199,670	1,159,788,193	1,068,630,741	930,088,961	2,274,987,863

DOMESTIC SALES (US + Canada) POUNDS	1Q 2023	2Q 2023	3Q 2023	4Q 2023	2023 YTD
Marine	105,250,099	93,823,266	79,652,156	62,177,917	199,073,365
Transportation	220,609,452	211,967,705	210,132,027	190,769,979	432,577,157
Infrastructure	241,119,845	246,473,121	225,628,685	200,618,790	487,592,966
Construction	297,382,062	289,242,686	284,837,656	272,071,916	586,624,748
Other	136,598,727	133,659,231	124,070,242	102,799,952	270,257,958
TOTAL	1,000,960,185	975,166,009	924,320,766	828,438,554	1,976,126,194

DOMESTIC SALES (US + Canada) POUNDS	1Q 2024	2Q 2024	3Q 2024	4Q 2024	2024 YTD	2024 YTD vs 2023 YTD
Marine	77,608,665	73,183,875			150,792,540	-24.3%
Transportation	207,612,768	227,243,941			434,856,709	0.5%
Infrastructure	211,391,758	219,153,071			430,544,829	-11.7%
Construction	306,645,269	321,820,592			628,465,861	7.1%
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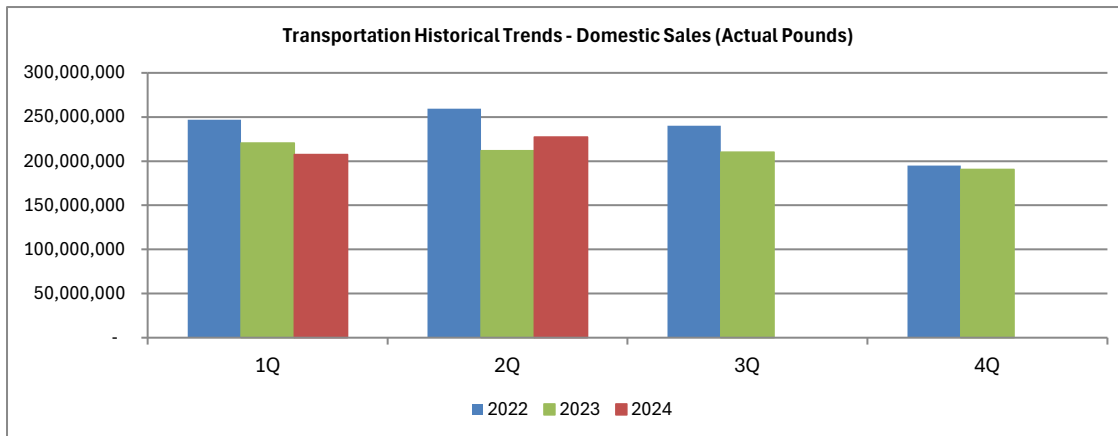
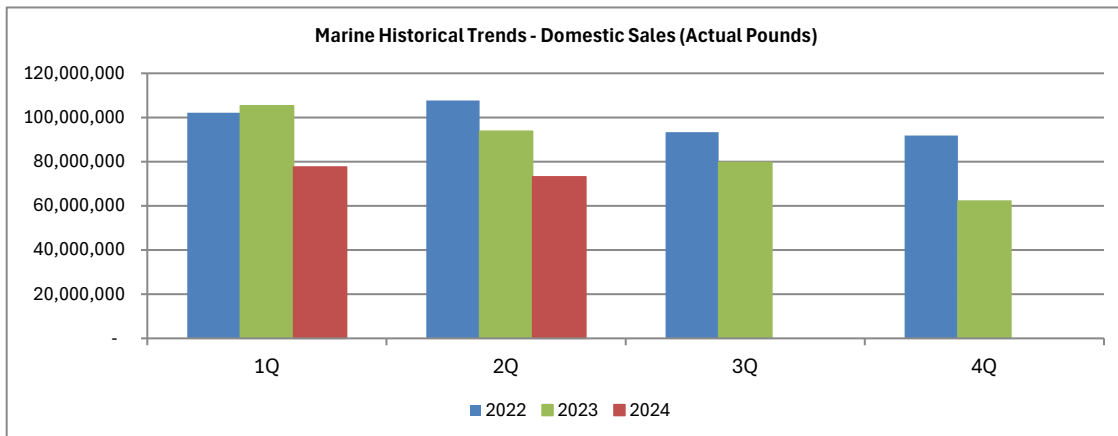
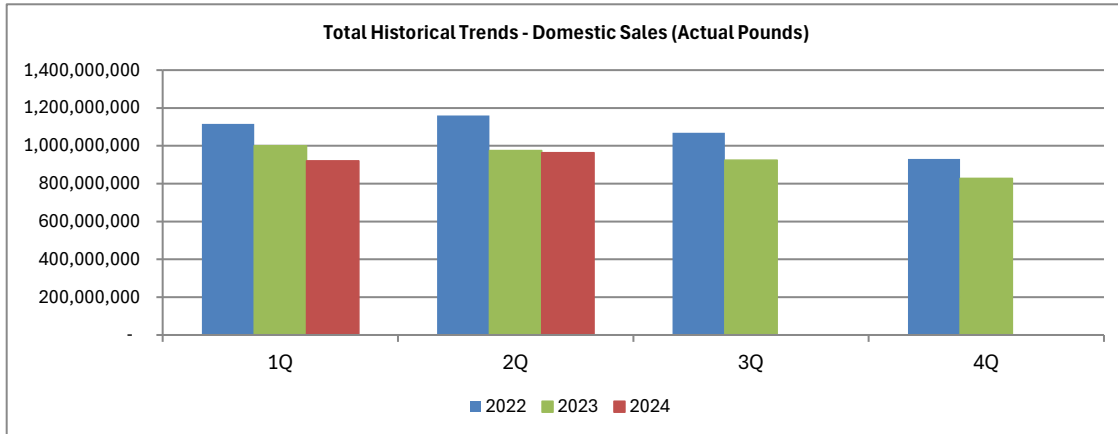
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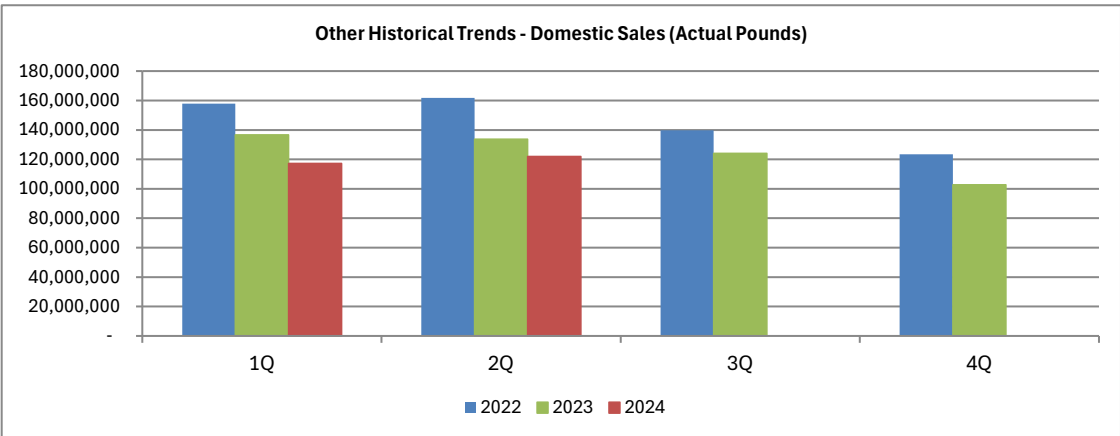
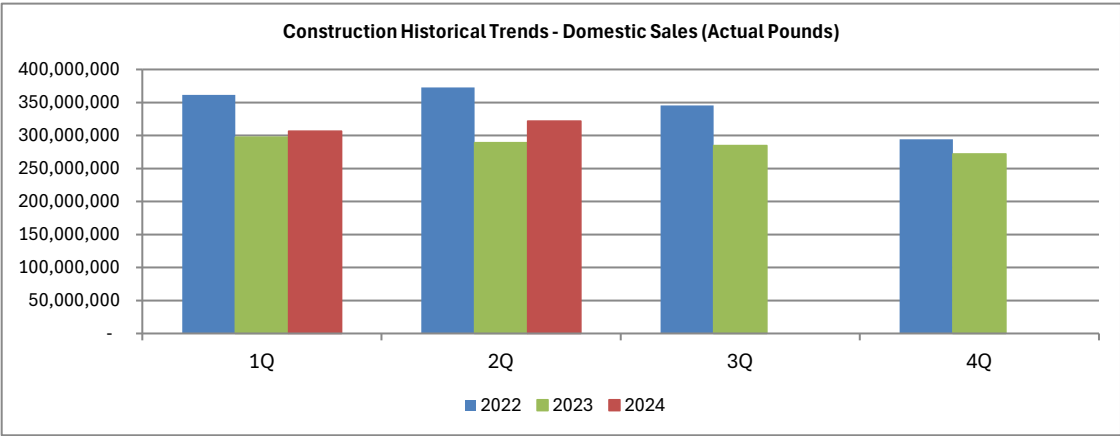
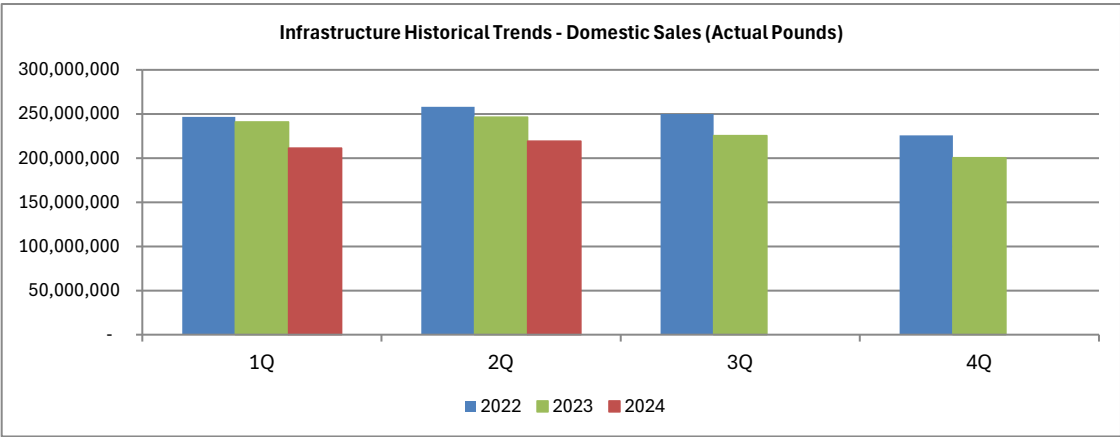
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ACMA Industry Statistics Program Definitions

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	
Exclude: N/A	

Construction Submarkets:	Examples include:
Architectural & 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

Other: everything else	
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)	

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

ACMA Total Composites Industry Report Participants

AOC

Composites One

INEOS Composites

Interplastic

Johns Manville

NEG

North American Composites

Owens Corning

Polynt-Reichhold

* Asterisk indicates data estimated for the current period.