



ACMA Industry Statistics Program Report

Q3 & Q4- Total Composites Industry Report

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

Released: March 11, 2025

Compiled by Vault Consulting, LLC



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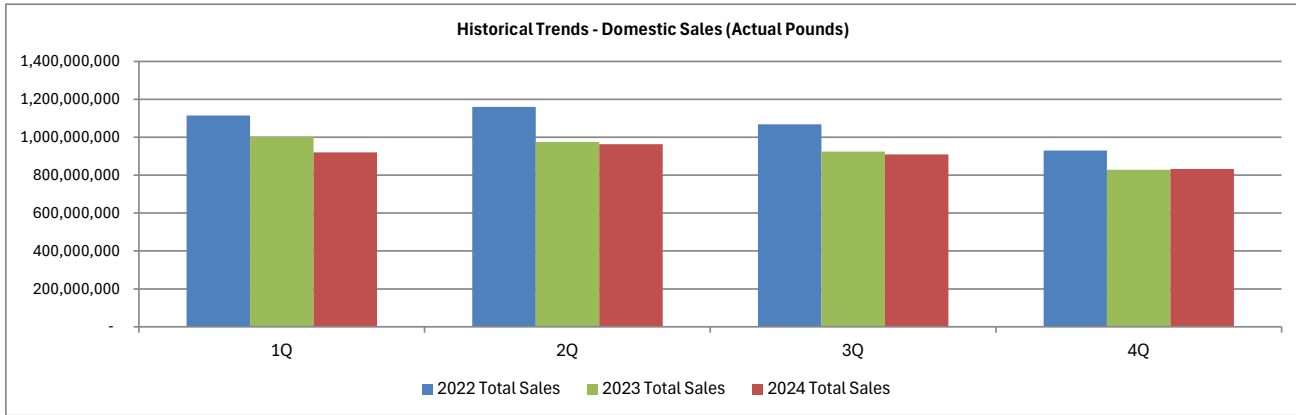
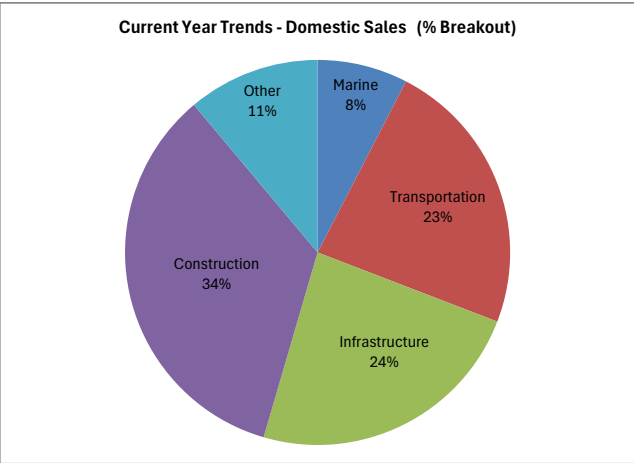
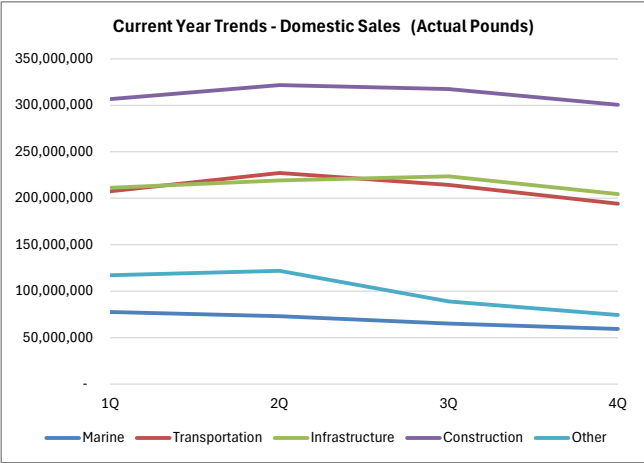
ACMA Total Composites Industry Report

Q3 & Q4 2024

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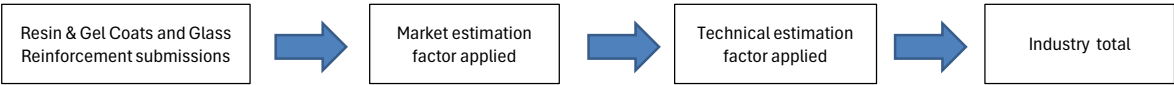
DOMESTIC SALES (US + Canada) POUNDS	4Q 2024	3Q 2024	4Q 2023	4Q 2024 vs 3Q 2024 % Change	4Q 2024 vs 4Q 2023 % Change
Marine	59,363,282	65,239,829	62,177,917	-9.0%	-4.5%
Transportation	194,153,737	214,332,557	190,769,979	-9.4%	1.8%
Infrastructure	204,525,975	223,598,852	200,618,790	-8.5%	1.9%
Construction	300,595,166	317,469,092	272,071,916	-5.3%	10.5%
Other	74,398,343	89,035,829	102,799,952	-16.4%	-27.6%
TOTAL	833,036,503	909,676,159	828,438,554	-8.4%	0.6%

DOMESTIC SALES (US + Canada) POUNDS	2024 YTD	2023 YTD	2024 YTD vs 2023 YTD % Change
Marine	275,395,651	340,903,438	-19.2%
Transportation	843,343,003	833,479,163	1.2%
Infrastructure	858,669,656	913,840,441	-6.0%
Construction	1,246,530,119	1,143,534,320	9.0%
Other	402,651,380	497,128,152	-19.0%
TOTAL	3,626,589,809	3,728,885,514	-2.7%



Methodology:

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



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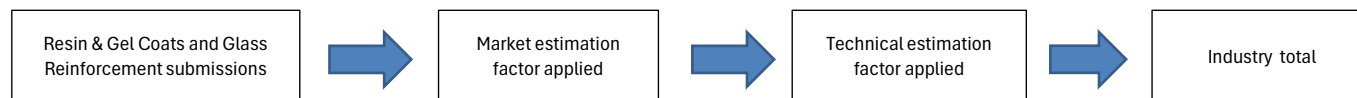
DOMESTIC SALES (US + Canada) POUNDS	1Q 2022	2Q 2022	3Q 2022	4Q 2022	2022 YTD
Marine	102,110,796	107,703,826	93,357,032	91,862,144	395,033,798
Transportation	247,023,880	259,508,202	240,034,313	194,897,963	941,464,358
Infrastructure	246,663,097	258,097,985	249,903,720	225,672,286	980,337,088
Construction	361,510,834	372,696,015	345,582,261	294,211,052	1,374,000,162
Other	157,891,063	161,782,165	139,753,415	123,445,516	582,872,159
TOTAL	1,115,199,670	1,159,788,193	1,068,630,741	930,088,961	4,273,707,565

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	340,903,438
Transportation	220,609,452	211,967,705	210,132,027	190,769,979	833,479,163
Infrastructure	241,119,845	246,473,121	225,628,685	200,618,790	913,840,441
Construction	297,382,062	289,242,686	284,837,656	272,071,916	1,143,534,320
Other	136,598,727	133,659,231	124,070,242	102,799,952	497,128,152
TOTAL	1,000,960,185	975,166,009	924,320,766	828,438,554	3,728,885,514

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	65,239,829	59,363,282	275,395,651	-19.2%
Transportation	207,612,768	227,243,941	214,332,557	194,153,737	843,343,003	1.2%
Infrastructure	211,391,758	219,153,071	223,598,852	204,525,975	858,669,656	-6.0%
Construction	306,645,269	321,820,592	317,469,092	300,595,166	1,246,530,119	9.0%
Other	117,276,999	121,940,209	89,035,829	74,398,343	402,651,380	-19.0%
TOTAL	920,535,459	963,341,688	909,676,159	833,036,503	3,626,589,809	-2.7%

Methodology:

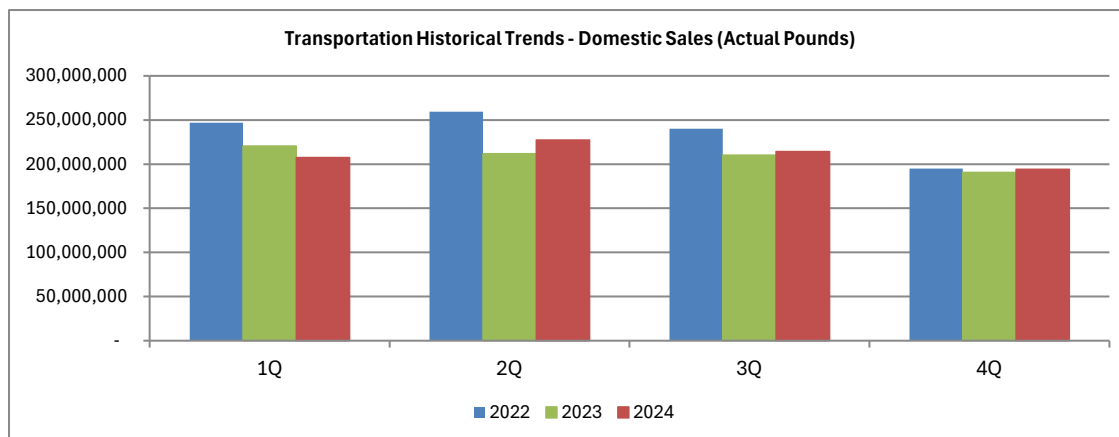
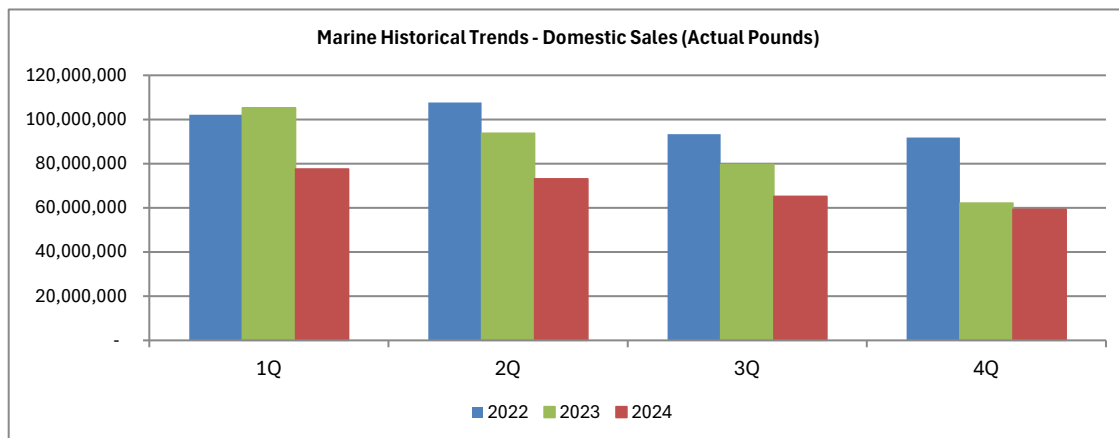
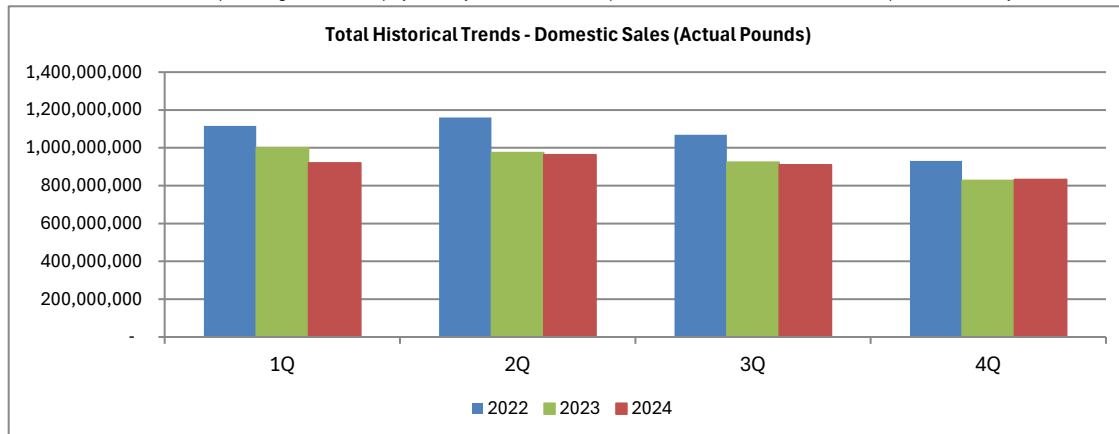
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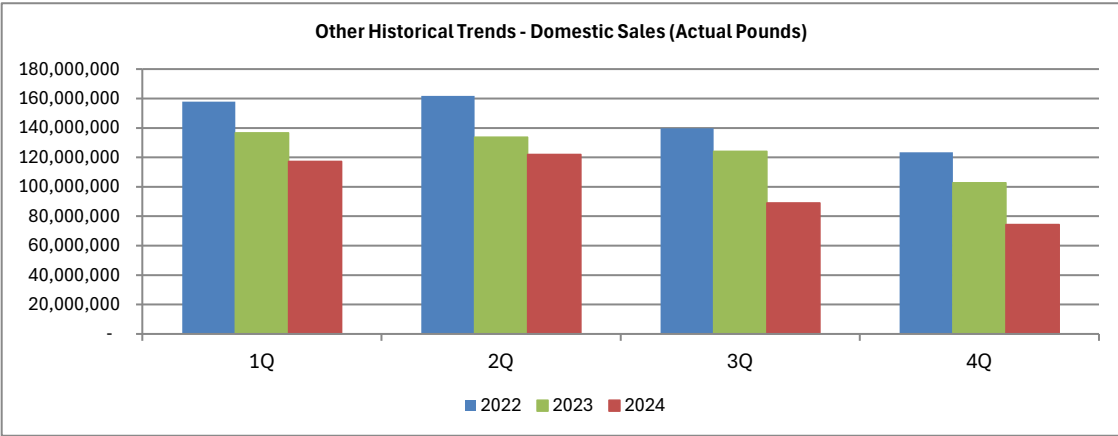
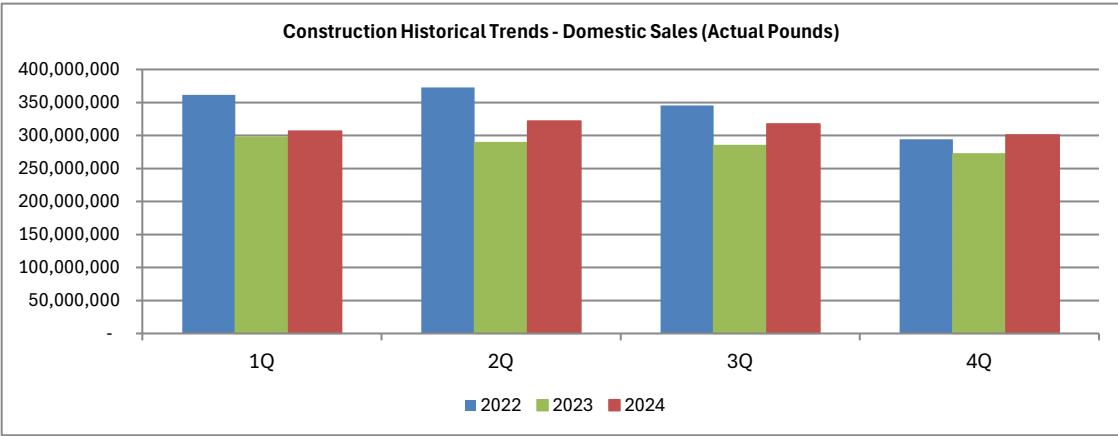
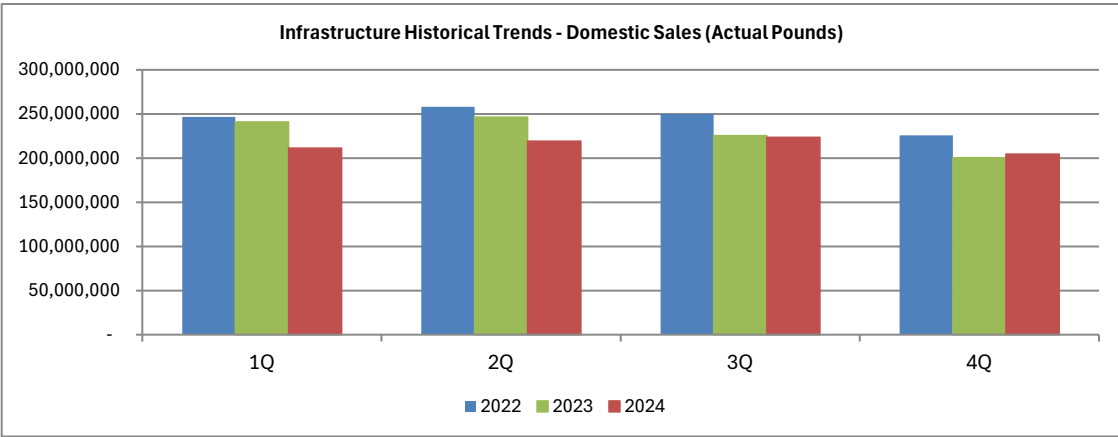


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ACMA Industry Statistics Program Definitions

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

NEG

North American Composites

Owens Corning

Polynt-Reichhold

* Asterisk indicates data estimated for the current period.

Year	Quarter	Period	Market Segment	Value
2022	1	1Q 2022	Marine	102,110,796
2022	1	1Q 2022	Transportation	247,023,880
2022	1	1Q 2022	Infrastructure	246,663,097
2022	1	1Q 2022	Construction	361,510,834
2022	1	1Q 2022	Other	157,891,063
2022	1	1Q 2022	TOTAL	1,115,199,670
2022	2	2Q 2022	Marine	107,703,826
2022	2	2Q 2022	Transportation	259,508,202
2022	2	2Q 2022	Infrastructure	258,097,985
2022	2	2Q 2022	Construction	372,696,015
2022	2	2Q 2022	Other	161,782,165
2022	2	2Q 2022	TOTAL	1,159,788,193
2022	3	3Q 2022	Marine	93,357,032
2022	3	3Q 2022	Transportation	240,034,313
2022	3	3Q 2022	Infrastructure	249,903,720
2022	3	3Q 2022	Construction	345,582,261
2022	3	3Q 2022	Other	139,753,415
2022	3	3Q 2022	TOTAL	1,068,630,741
2022	4	4Q 2022	Marine	91,862,144
2022	4	4Q 2022	Transportation	194,897,963
2022	4	4Q 2022	Infrastructure	225,672,286
2022	4	4Q 2022	Construction	294,211,052
2022	4	4Q 2022	Other	123,445,516
2022	4	4Q 2022	TOTAL	930,088,961
2023	1	1Q 2023	Marine	105,250,099
2023	1	1Q 2023	Transportation	220,609,452
2023	1	1Q 2023	Infrastructure	241,119,845
2023	1	1Q 2023	Construction	297,382,062
2023	1	1Q 2023	Other	136,598,727
2023	1	1Q 2023	TOTAL	1,000,960,185
2023	2	2Q 2023	Marine	93,823,266
2023	2	2Q 2023	Transportation	211,967,705
2023	2	2Q 2023	Infrastructure	246,473,121
2023	2	2Q 2023	Construction	289,242,686
2023	2	2Q 2023	Other	133,659,231
2023	2	2Q 2023	TOTAL	975,166,009
2023	3	3Q 2023	Marine	79,652,156
2023	3	3Q 2023	Transportation	210,132,027
2023	3	3Q 2023	Infrastructure	225,628,685
2023	3	3Q 2023	Construction	284,837,656
2023	3	3Q 2023	Other	124,070,242
2023	3	3Q 2023	TOTAL	924,320,766
2023	4	4Q 2023	Marine	62,177,917

2023	4 4Q 2023	Transportation	190,769,979
2023	4 4Q 2023	Infrastructure	200,618,790
2023	4 4Q 2023	Construction	272,071,916
2023	4 4Q 2023	Other	102,799,952
2023	4 4Q 2023	TOTAL	828,438,554
2024	1 1Q 2024	Marine	77,608,665
2024	1 1Q 2024	Transportation	207,612,768
2024	1 1Q 2024	Infrastructure	211,391,758
2024	1 1Q 2024	Construction	306,645,269
2024	1 1Q 2024	Other	117,276,999
2024	1 1Q 2024	TOTAL	920,535,459
2024	2 2Q 2024	Marine	73,183,875
2024	2 2Q 2024	Transportation	227,243,941
2024	2 2Q 2024	Infrastructure	219,153,071
2024	2 2Q 2024	Construction	321,820,592
2024	2 2Q 2024	Other	121,940,209
2024	2 2Q 2024	TOTAL	963,341,688
2024	3 3Q 2024	Marine	65,239,829
2024	3 3Q 2024	Transportation	214,332,557
2024	3 3Q 2024	Infrastructure	223,598,852
2024	3 3Q 2024	Construction	317,469,092
2024	3 3Q 2024	Other	89,035,829
2024	3 3Q 2024	TOTAL	909,676,159
2024	4 4Q 2024	Marine	59,363,282
2024	4 4Q 2024	Transportation	194,153,737
2024	4 4Q 2024	Infrastructure	204,525,975
2024	4 4Q 2024	Construction	300,595,166
2024	4 4Q 2024	Other	74,398,343
2024	4 4Q 2024	TOTAL	833,036,503