



ACMA Industry Statistics Program Report

Second Quarter 2021 - Total Composites Industry Report

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Compiled by Vault Consulting, LLC



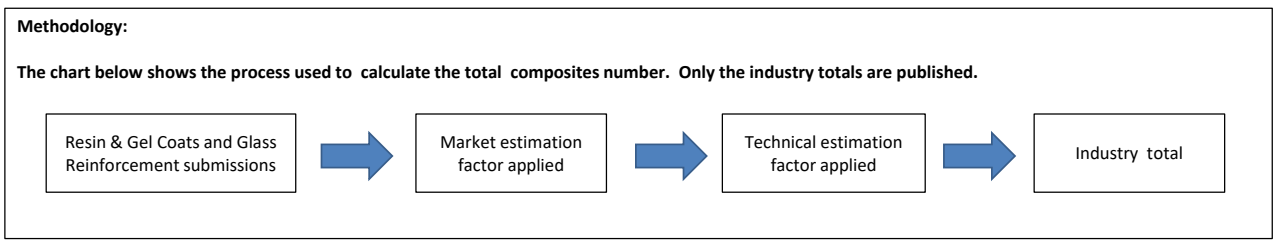
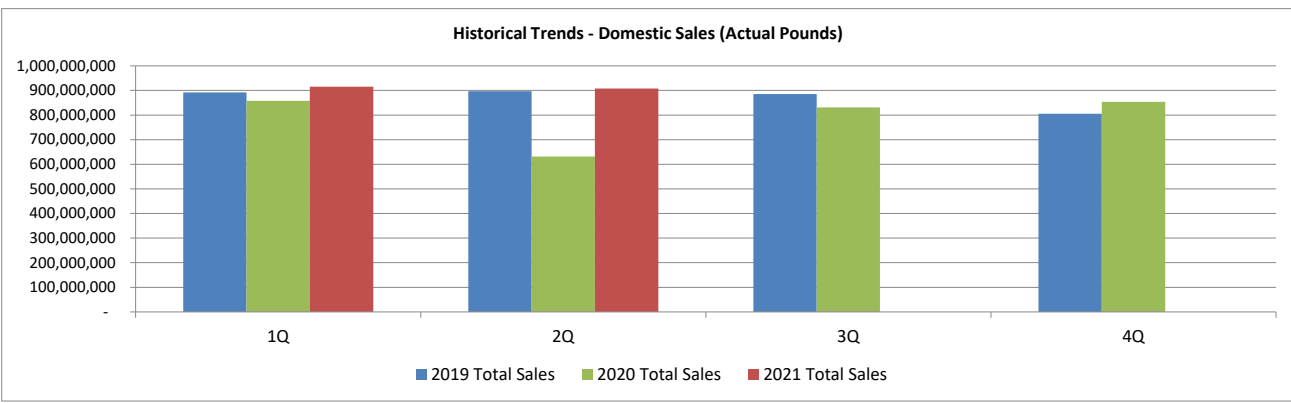
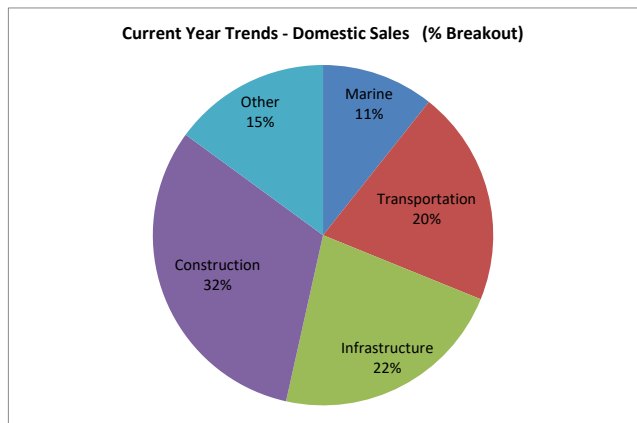
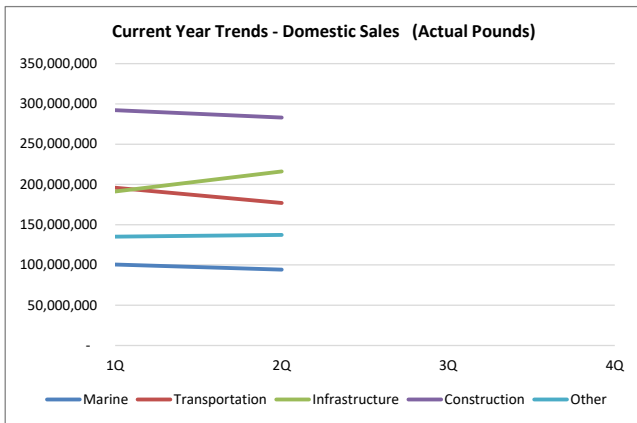
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ACMA Total Composites Industry Report*
Second Quarter 2021

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

DOMESTIC SALES (US + Canada) POUNDS	2Q 2021	1Q 2021	2Q 2020	2Q 2021 vs 1Q 2021 % Change	2Q 2021 vs 2Q 2020 % Change
Marine	94,205,386	100,532,665	54,359,267	-6.3%	73.3%
Transportation	176,958,196	195,889,399	78,597,572	-9.7%	125.1%
Infrastructure	216,121,491	191,248,021	178,096,419	13.0%	21.4%
Construction	283,037,248	292,191,577	233,224,523	-3.1%	21.4%
Other	137,314,117	135,164,575	87,396,311	1.6%	57.1%
TOTAL	907,636,438	915,026,237	631,674,092	-0.8%	43.7%

DOMESTIC SALES (US + Canada) POUNDS	2021 YTD	2020 YTD	2021 YTD vs 2020 YTD % Change
Marine	194,738,051	141,487,501	37.6%
Transportation	372,847,595	243,763,910	53.0%
Infrastructure	407,369,512	391,781,305	4.0%
Construction	575,228,825	503,123,932	14.3%
Other	272,478,692	209,598,462	30.0%
TOTAL	1,822,662,675	1,489,755,110	22.3%



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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	189,452,647
Transportation	198,548,729	185,732,569	188,873,086	163,432,900	384,281,298
Infrastructure	229,186,730	232,302,519	235,342,000	212,348,286	461,489,249
Construction	262,405,661	262,775,295	258,165,392	246,870,634	525,180,956
Other	107,883,162	120,896,257	115,524,997	102,298,869	228,779,419
TOTAL	892,085,402	897,098,167	884,992,904	805,348,553	1,789,183,569

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	141,487,501
Transportation	165,166,338	78,597,572	153,936,214	180,220,175	243,763,910
Infrastructure	213,684,886	178,096,419	202,730,604	195,000,570	391,781,305
Construction	269,899,409	233,224,523	275,816,368	269,401,477	503,123,932
Other	122,202,151	87,396,311	114,821,000	124,687,790	209,598,462
TOTAL	858,081,018	631,674,092	831,396,488	853,869,449	1,489,755,110

DOMESTIC SALES (US + Canada) POUNDS	1Q 2021	2Q 2021	3Q 2021	4Q 2021	2021 YTD	2021 YTD vs 2020 YTD
Marine	100,532,665	94,205,386			194,738,051	37.6%
Transportation	195,889,399	176,958,196			372,847,595	53.0%
Infrastructure	191,248,021	216,121,491			407,369,512	4.0%
Construction	292,191,577	283,037,248			575,228,825	14.3%
Other	135,164,575	137,314,117			272,478,692	30.0%
TOTAL	915,026,237	907,636,438			1,822,662,675	22.3%

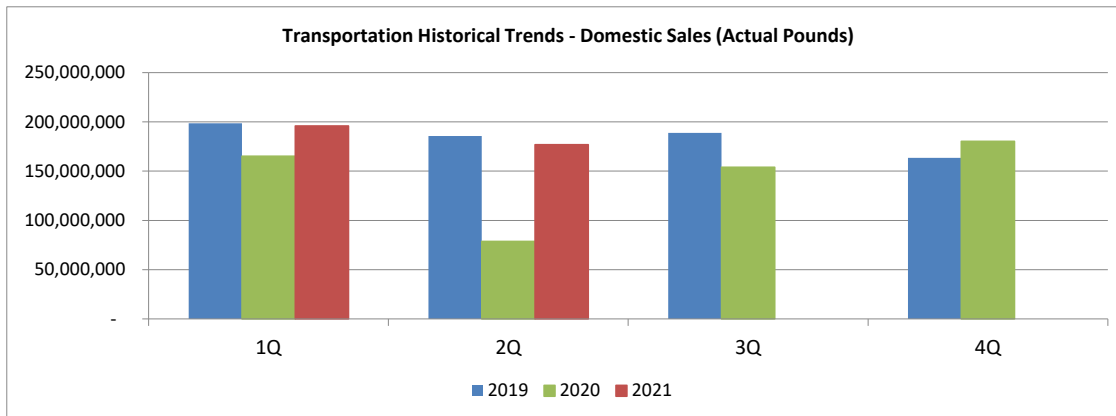
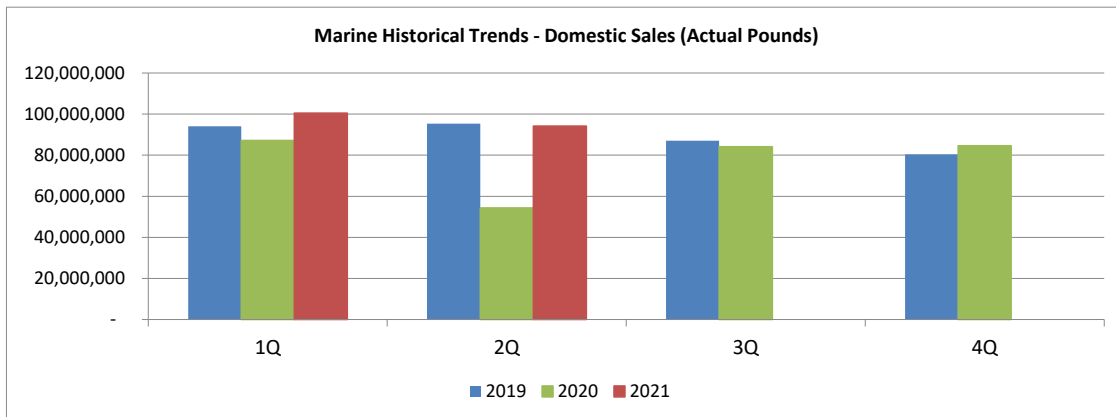
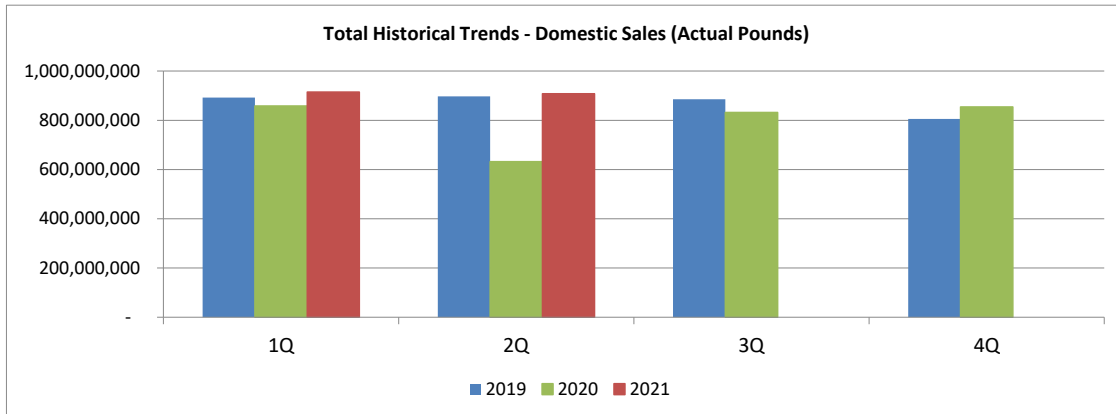
Methodology:

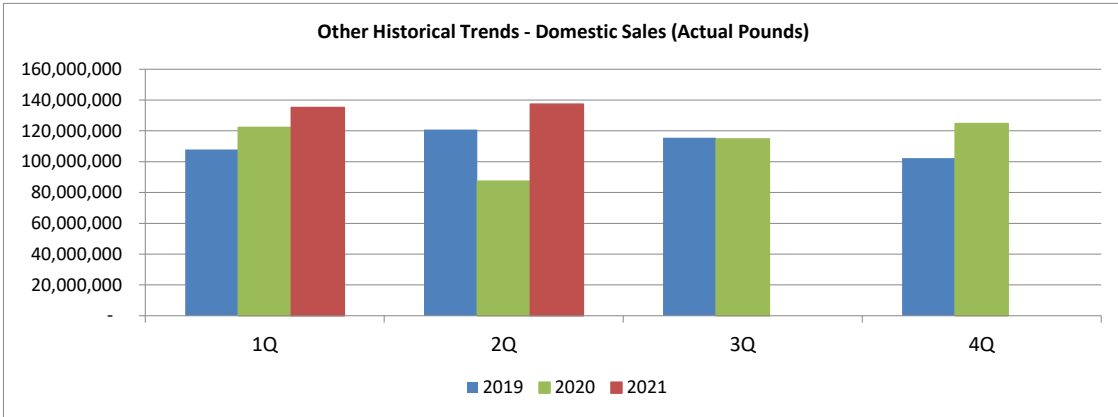
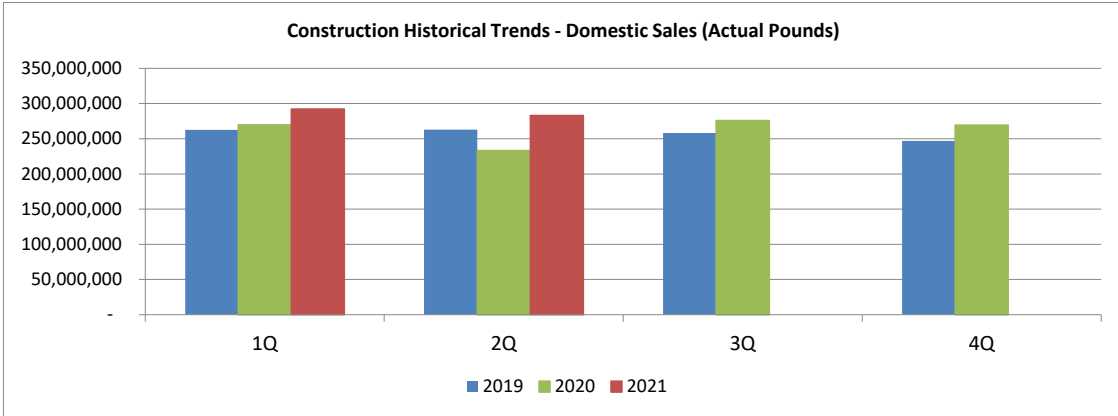
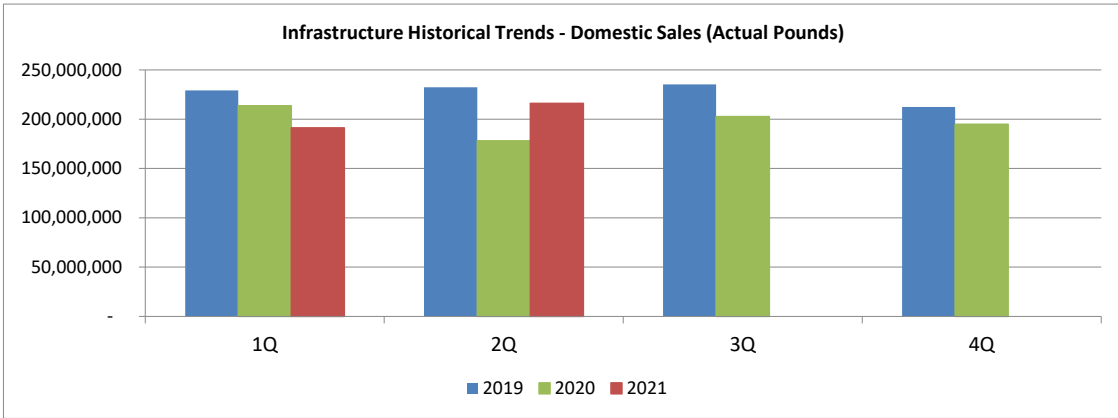
The chart below shows the process used to calculate the total composites number. Only the industry totals are published.



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ACMA 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