

A green line graph icon with three bars of increasing height, enclosed within a green hexagonal frame. A green arrow points from the top of the third bar towards the word "PULSE".

PULSE *OF THE* **INDUSTRY**

AMERICAN COMPOSITES MANUFACTURERS ASSOCIATION

2nd Quarter 2026



Summary of Key Findings

Expected Customer Demand:

Perceptions among total respondents were **generally unchanged from 1Q26 to 2Q26 for expected increases in customer demand in each of the market segments.**

Over the past year, respondents are feeling a bit more **bullish about the Transportation market** as expected increases in customer demand have nearly doubled from 17% in 2Q25 to 31% in 2Q26.

"Right" Amount of Inventory:

In 2Q26 perceptions that inventory levels are at the "right" amount **dropped by 13 percentage points for Glass Fiber Reinforcements** to 60% after a steady increase from 2Q25 through 1Q26.

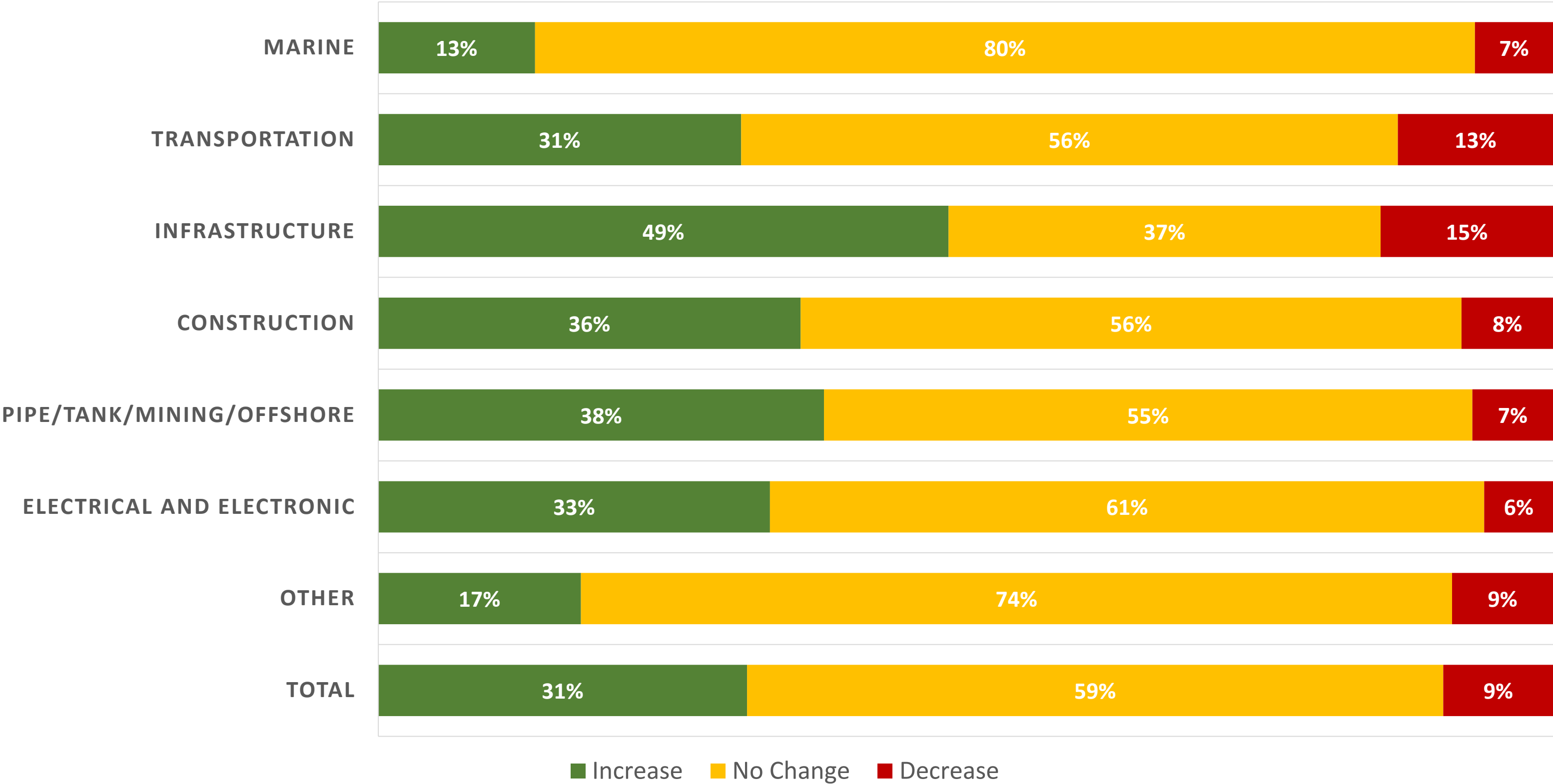
Conversely, perceptions that inventory levels are the "right amount" for Core Reinforcements rebounded this quarter after declining substantially in 1Q26.

Stability of Product Lead Time:

Perceptions that product lead time is stable for **Glass Fiber Reinforcements declined** for a second time since 4Q25. **68% of total respondents reported lead time for this product to be stable in 2Q26 dropping from 85% in 4Q25.**

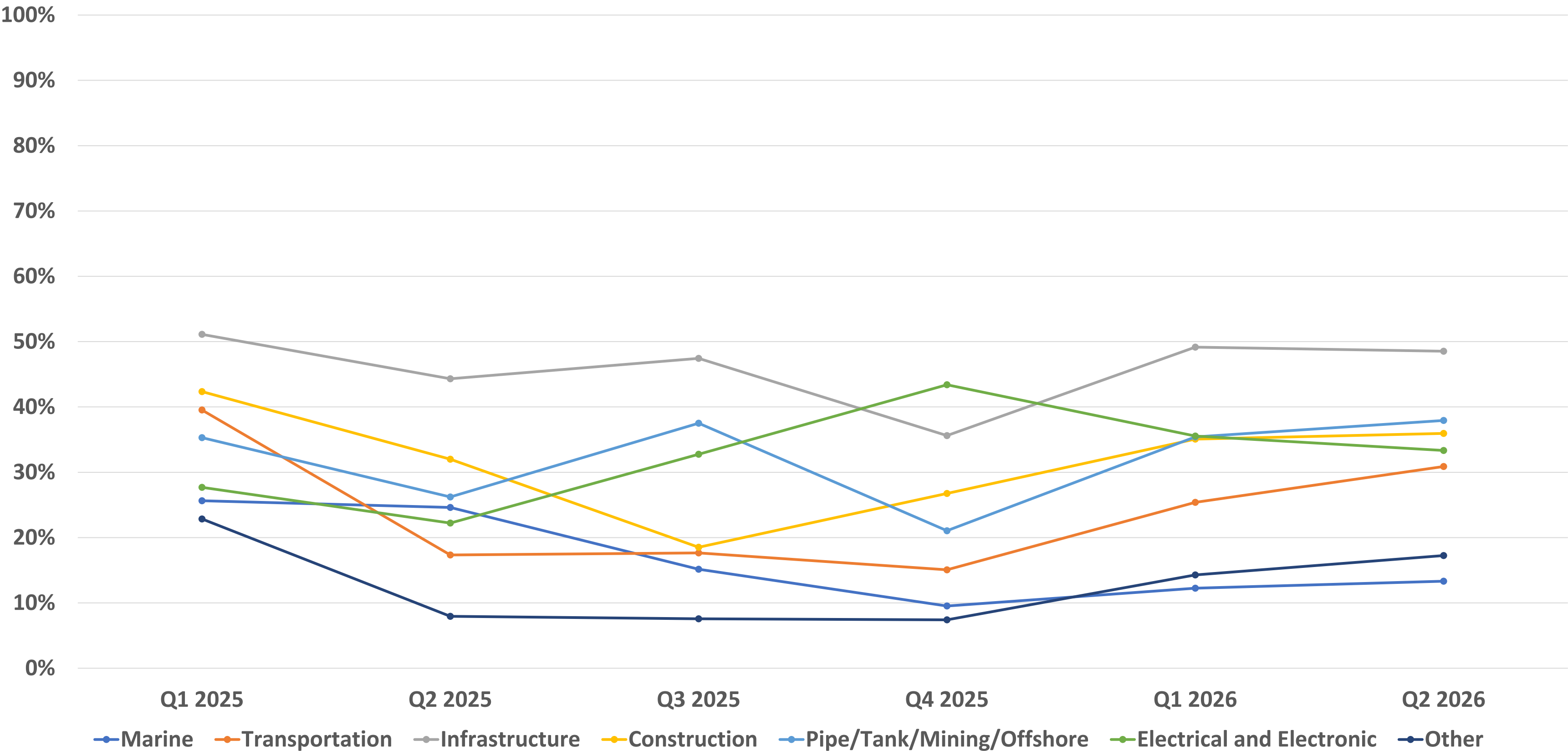
Data collected 3/2 to 3/20/2026 (85)

CUSTOMER DEMAND BY MARKET CURRENT QUARTER VS PREVIOUS QUARTER

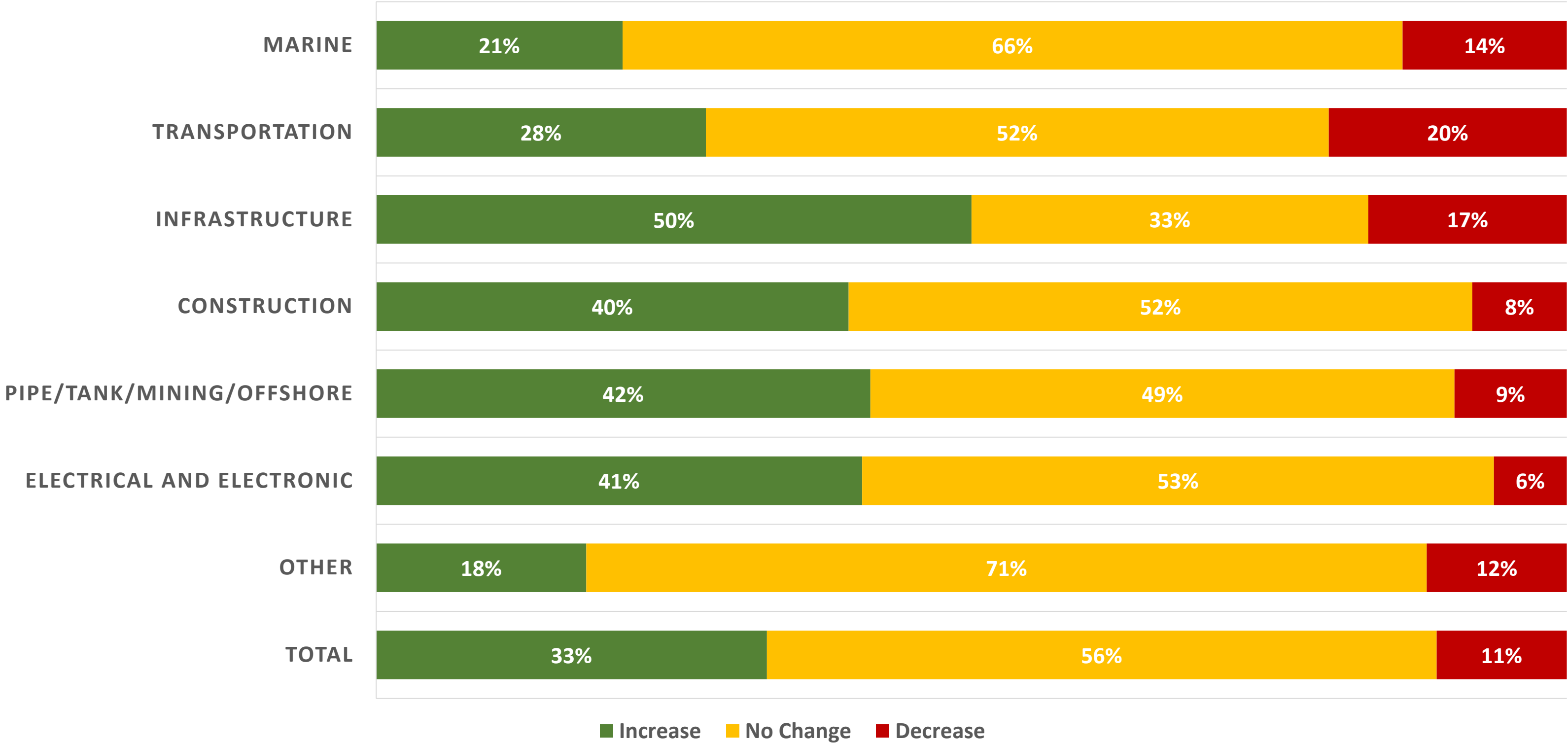


Survey Question:
What is the outlook for customer demand in North America in the current quarter compared to the prior quarter

HISTORICAL TRENDS: Expected Increase in Customer Demand Quarter over Quarter



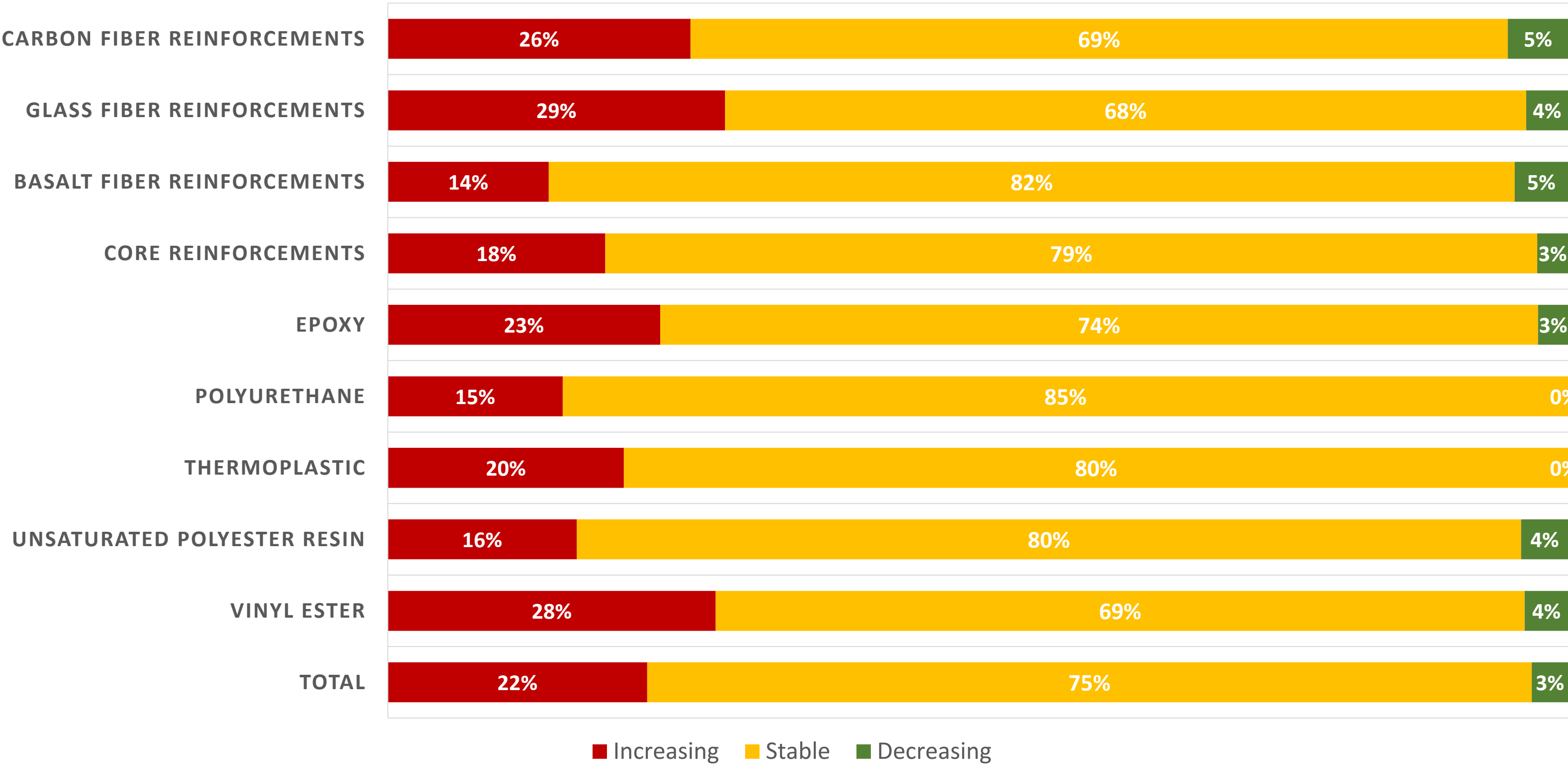
CUSTOMER DEMAND BY MARKET - 2026 VS 2025



Survey Question:

What is the outlook for customer demand in North America in 2026 compared to 2025 in the following markets?
Please only answer for markets for which you have knowledge.

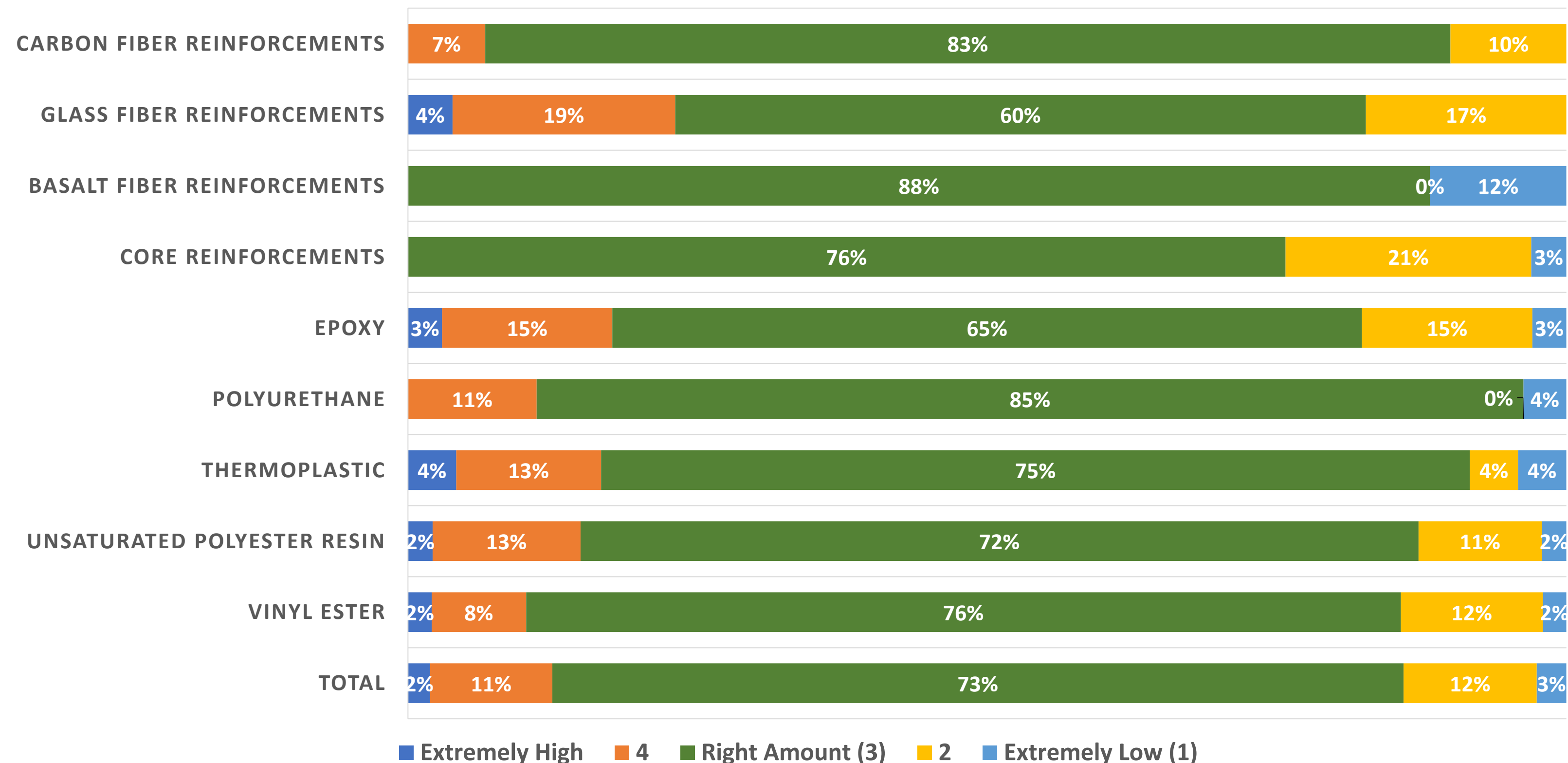
CURRENT LEAD TIME BY PRODUCT



Survey Question:

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

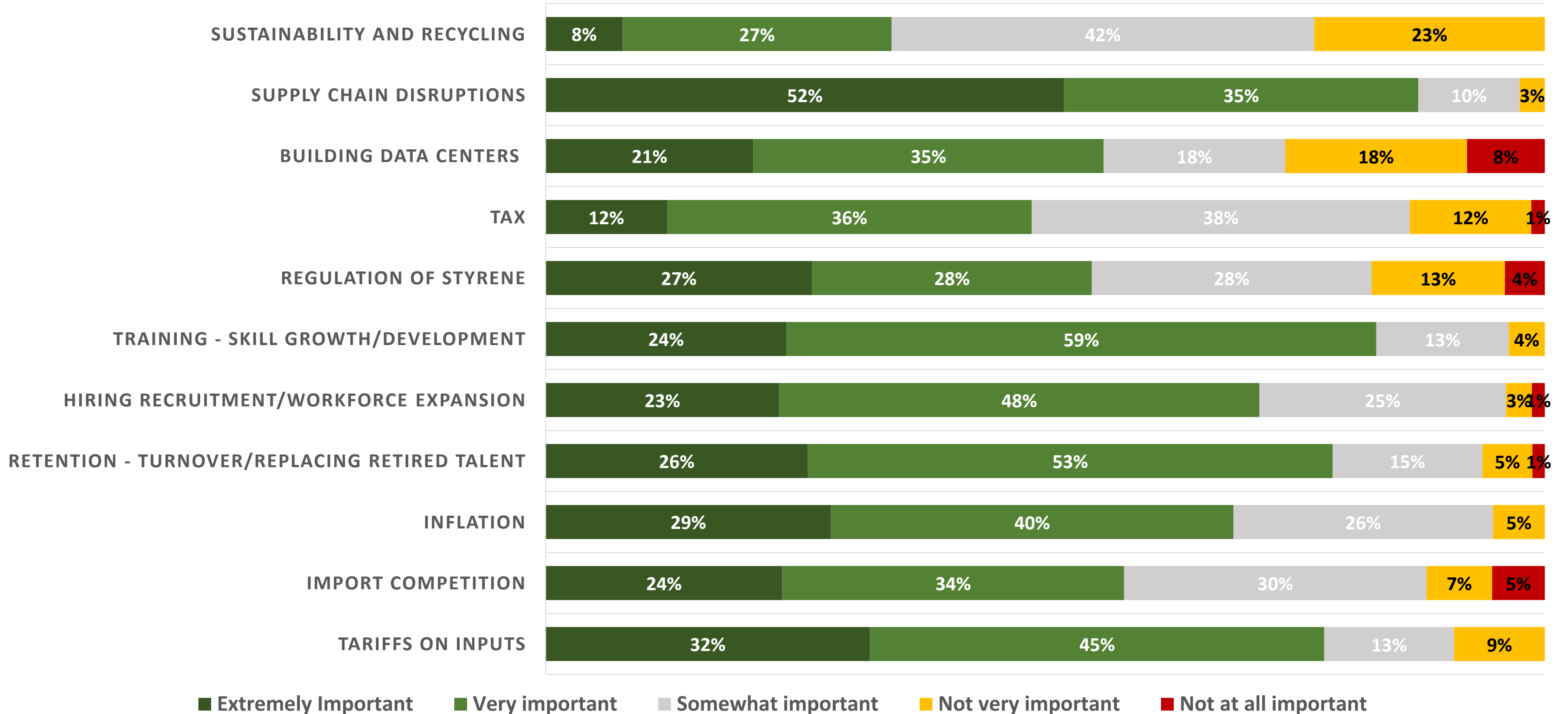
CURRENT INVENTORY



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.

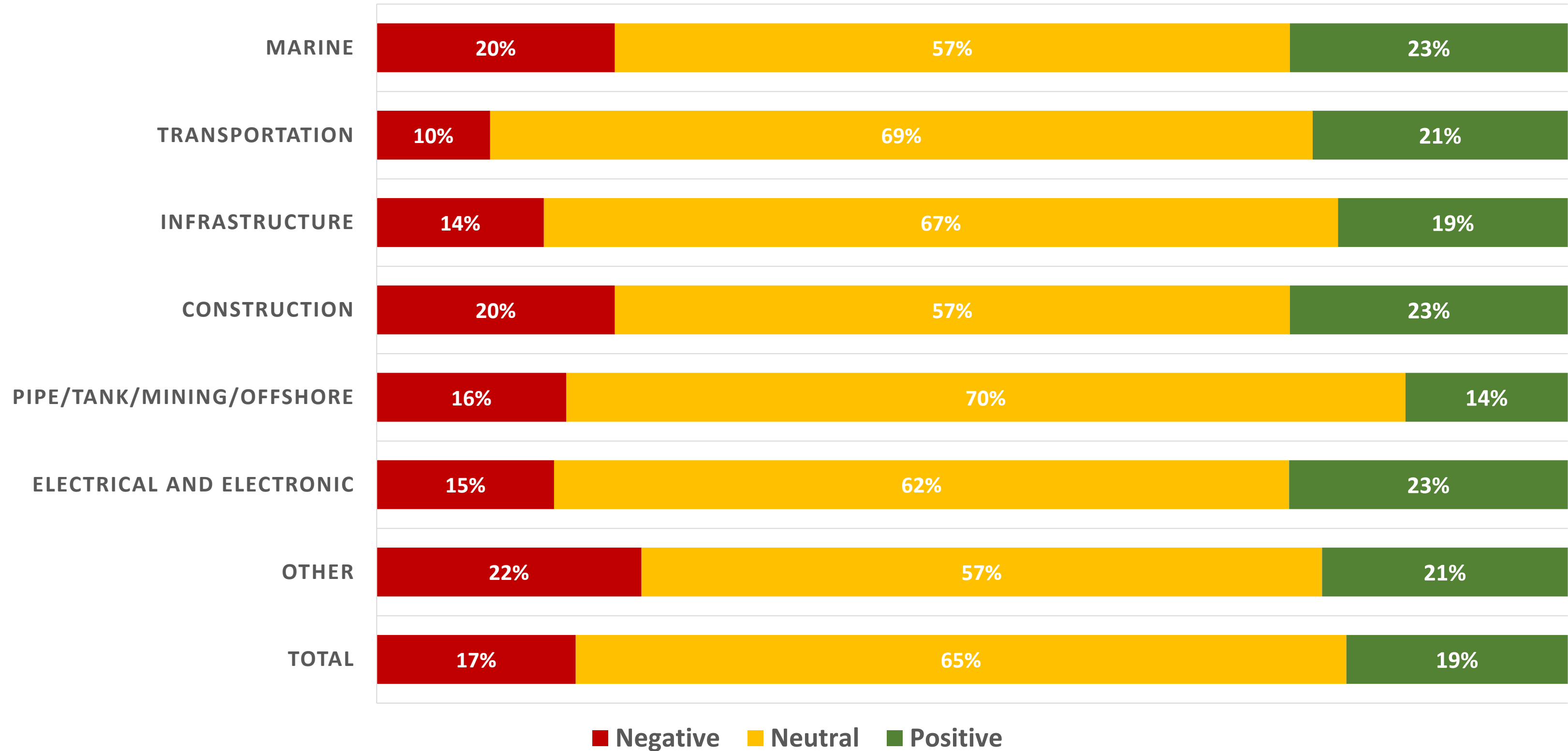
INDUSTRY TOPICS OF INTEREST



Survey Question:

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

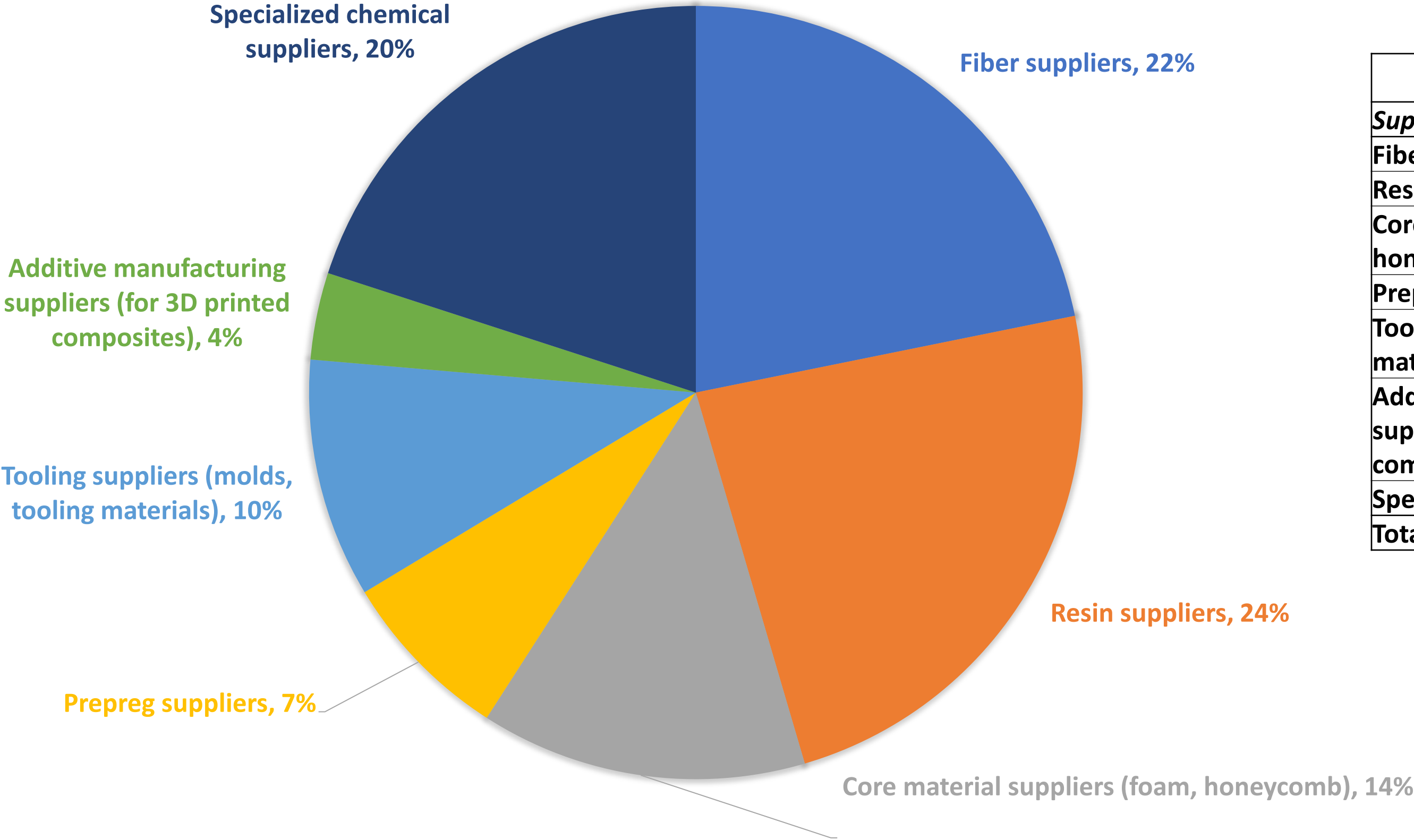
IMPACT OF TARIFFS



Survey Question:

For each market segment listed, please indicate what effect the tariffs you expect to have on your business, positive, negative or neutral.

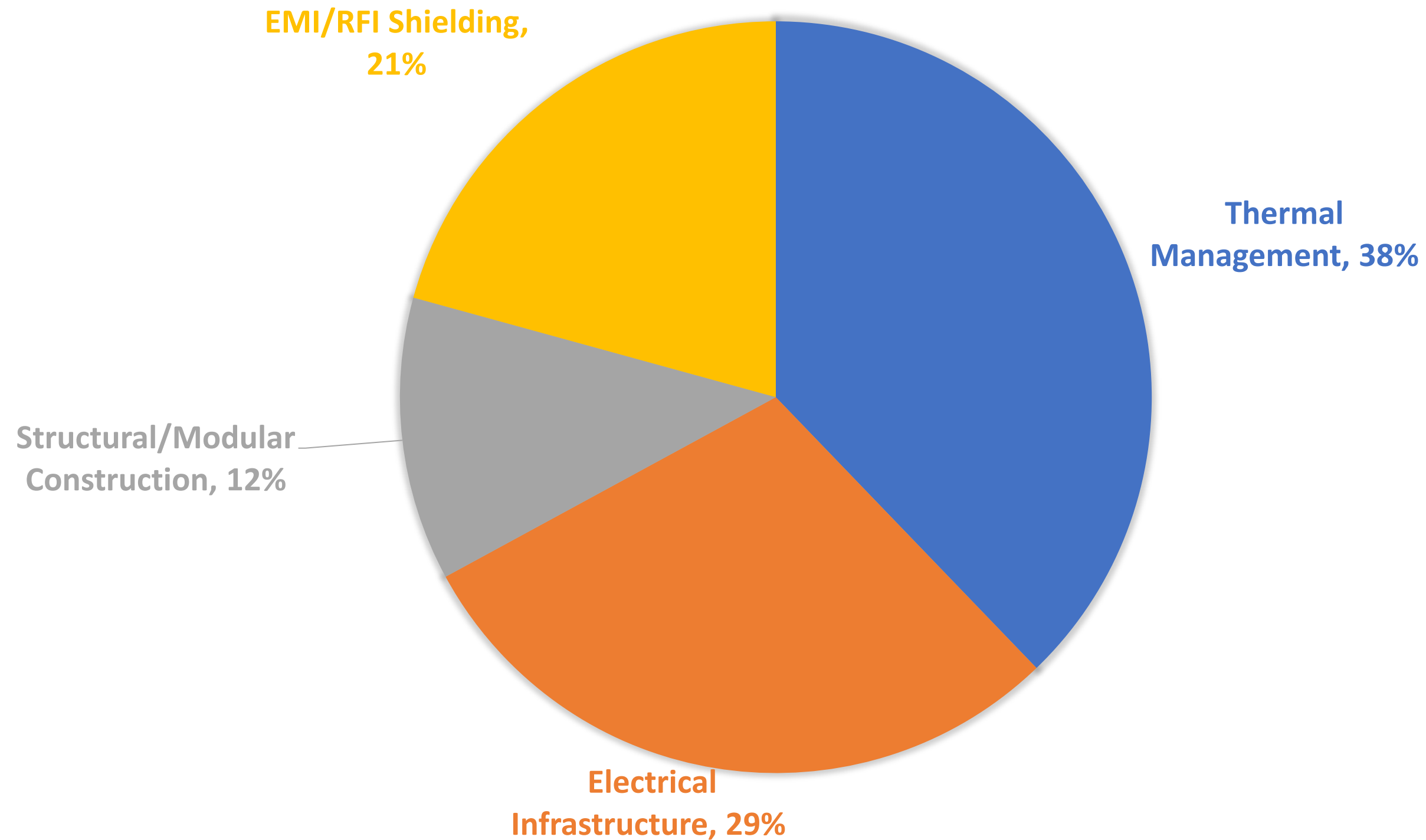
SUPPLY CHAIN DISRUPTIONS



Overall	
Supplier	
Fiber suppliers	22%
Resin suppliers	24%
Core material suppliers (foam, honeycomb)	14%
Prepreg suppliers	7%
Tooling suppliers (molds, tooling materials)	10%
Additive manufacturing suppliers (for 3D printed composites)	4%
Specialized chemical suppliers	20%
Total	100%

Survey Question:
Please select ALL of the following supplier categories in which you expect supply chain disruptions.

AI DATA CENTER APPLICATIONS



Building Data Centers:

Over half of total respondents (56%) report it as **Extremely/Very important to their company.**

Follow Up Survey Question:

In which of the following AI data center applications do you see the highest potential for composite materials?

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*Your Survey
Responses Matter!*