



THE AMERICAN COMPOSITES MANUFACTURERS ASSOCIATION (ACMA) PROVIDES A SINGULAR, VITAL FORUM AND VOICE FOR THE COMPOSITES INDUSTRY AS WE ADDRESS THE CHALLENGES OF TODAY AND THE FUTURE.

A large, white, composite wind turbine blade is shown in a close-up, low-angle shot, extending from the bottom left towards the top center of the page. The background is a solid blue color with faint, light blue geometric patterns.

A Strong Voice for the Composites Industry



ANNUAL REPORT

2008-2009

ACMA's Mission

Three top-priority goals support the efforts and cohesive direction of the association as we work to provide our members with the greatest return on their investment. These goals are to:

- Be the recognized source of education and information for the composites industry
- Proactively and positively affect regulatory and legislative outcomes
- Promote the development and expansion of markets for composite products

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From Our President

"Although these are unusual and challenging times for our industry and country, the future remains bright for both."

I want to say thank you to the ACMA staff, the industry volunteers who continue to work tirelessly to move our industry forward, and all of the ACMA membership who consistently support the efforts of the association through their financial contributions and personal involvement. It is through your dedication and professionalism that our association and industry continue to innovate and move forward.

Although these are unusual and challenging times for our industry and country, the future remains bright for both. Composites-based products offer weight reduction, corrosion resistance, life-cycle costing, environmental sustainability, durability, non-conductivity and natural raw material replacement. They are well positioned for a world demanding more compatible and environmentally friendly products. We will continue to see emerging markets requiring the material advantages of composites.

In the face of a severely reduced budget and staff, our association and its member volunteers have accomplished much in the past year:

- Launched highly successful educational webinars and conducted the largest industry conference in Tampa, Fla., with more than 2,500 attendees and 183 exhibitors.
- Developed a risk communications management program and established the first Composites Caucus in the United States House of Representatives (currently with 25 House Members) to help develop and move forward composites initiatives.
- Completed the adoption of section 2612 for fiberglass reinforced polymer through the International Code Council.

If you are not an active member of an ACMA division, alliance or council, I encourage you to get involved. In July, the Transportation Structures Council and other ACMA members flew to Washington, D.C. to petition Congress for the inclusion in the new highway bill of composites-based products in the construction and refurbishment of bridges. This resulted in the commitment of numerous House members to move for inclusion. This happened because ACMA members got involved, developed a program through an ACMA council and acted. The benefit to these ACMA members is the potential for new business in the bridge market.

The better days for our industry are ahead of us as we see the advantages of composites increasingly being accepted. I look forward to working with each of you as we all move to realize the potential of composites in an ever changing world.

Monty Felix



From Our Chief Staff Executive

"The ACMA continues to do for the industry things that no single company can do."

As a reflection of the industry, ACMA felt the effects of the recession last year in terms of lost revenues. In spite of the financial challenges, ACMA continued to provide value to members and service to the industry across our three mission areas: Education and Information for the Industry, Legislative and Regulatory Advocacy, and Member Company Prosperity.

The details of our accomplishments are listed throughout the report. You will see that member companies got tremendous value for their investment. The ACMA continues to do for the industry things that no single company can do. You will see several instances where we protect the industry from uninformed decisions made by regulators that could make it impossible to do business. In addition, we have developed tools to assist you in addressing any concerns about the materials you use in talking to your employees and your community.

You will also see how companies like yours, working together, can grow markets through developing codes and standards for composites. The changes in the International Building Code and the development of the Load Resistance Factor Design (LRFD) are ways to make it easier for architects and engineers to specify composites for the built environment. ACMA members through their Divisions, Alliances and Councils are working to open and expand markets.

Finally ACMA is working to provide you and your employees the education and information you need to be successful, particularly in these challenging times. ACMA's Certified Composites Technician program remains state-of-the-art training for the composites industry. The association has launched a monthly educational webinar series that has been very well received.

The most important part of any association is members coming together to learn from each other and to work together. ACMA's COMPOSITES trade show and educational programming provides the opportunity for member companies to learn about the latest innovations in the industry.

While we are fewer and have a little less to work with, your staff remains dedicated to serving the industry. This is a bright, motivated team that sets high standards for itself. I always welcome your thoughts about the industry and your association.

Tom Dobbins



From Our Immediate Past President

"I am sure new opportunities and challenges will appear – things we are not even thinking about today."

Many of you who know me personally have heard me repeat something Robert Morrison once said: The composites industry "has an ever so bright future and an ever so difficult present." During my 43 years in this industry I have experienced periods where the "present" was certainly less "difficult" than today, but at no time have I ever felt that our industry was anywhere near its potential. The world today abounds with opportunities for composite products—we remain in the infancy of our potential. Our "ever so bright future" still lies ahead.

I say this fully realizing that the economic conditions we have had and are currently enduring make it hard for many of our members to think about the future. The present is, indeed, challenging. Our industry will, however, survive this economic downturn as well as future downturns. We will prosper again.

An essential element to assure the health and well-being of our industry is the ACMA—our industry trade association. Opportunities and challenges currently exist and will continue to exist that can only be addressed by a strong industry alliance. Individual companies simply do not and will not have the resources, recognition, or clout necessary to address many of these issues. You know what the issues are. Examples include codes and standards, environmental regulations, chemical classifications, and educational programs in the future, I am sure new opportunities and challenges will appear—things we are not even thinking about today.

So what one thing is needed to assure ACMA's viability? The answer is clear. It is participation. All trade associations have power and clout in proportion to the percentage of the industry it represents. We need more companies willing to do their fair share and not depend on others. I believe participation in ACMA is our responsibility. I can assure you that our company will do its part. How about yours?

ACMA has had many successes and accomplishments. It has current initiatives that will expand our markets, protect our industry from overzealous regulators, and help us recognize and use our "green" advantages over other materials. I urge you to get involved and support your Board of Directors and your new President, Monty Felix, to assure that ACMA stays strong and viable.

A handwritten signature in black ink, appearing to read 'John Tickle'. The signature is stylized and cursive.

John Tickle

Goal: Be the Recognized Source of Education and Information for the Composites Industry

Certification

The Certified Composites Technician (CCT) program is recognized as the premier certification program for employees in the composites industry. It provides a highly effective and efficient curriculum for developing world-class employees well versed and educated in the latest composites process technology. Launched in 2000, the program has grown from one basic curriculum to eight core process certifications, with three more under development.

- Over 400 new CCT enrollments
- 375 certifications, bringing the total number of people certified to more than 4,000.
- Conducted four Instructor tutorial sessions for Instructor candidates
- Completed an academic partnership to develop a one- and two-year composites program, which includes CCT certifications



Webinar

ACMA launched the “On Target, On Line” webinar program to provide the composites industry with continuous learning opportunities on challenges facing the composites industry. Eight, one-hour-long webinars were provided in 2008-2009, covering a wide variety of issues from health and safety to marketing and sales. These presentations are recorded and available thru ACMA bookstore, providing additional learning opportunities for those who could not participate in the broadcast. More than 327 unique members and nonmembers have attended a Webinar program.

- Published the 2008 Composites Industry Report (members only) that provides information on the impact of composites production in the U.S., as well as U.S. Fiberglass thermoset composites shipments by year and market. The report also includes sales and volumes of select end-use markets that use composites. Construction, marine, transportation (auto, heavy truck), wind energy, sports and leisure are included.
- Responded to more than 2,600 technical inquiries from members, assisting in problem-solving and improving quality.
- Finalized emissions testing that will be used to support on-going regulatory efforts and emissions reporting

Mission: Education

- ❖ Emissions factors for DCPD resins were added to the ANSI ANS UEF Emissions Factors for Open Molding processes. The ACMA provides the home for the UEF Relevant committee and canvass panel that is responsible for this national standard. This standard aids our members in satisfying state and federal requirements for permit compliance and emissions reporting.
- ❖ Completed the cataloguing of all technical papers presented at the annual convention from 2000 – 2008, making them available for members only, on the website.

Conference

Attracted more than 3,100 industry members to three events, despite a challenging economy.

- ❖ In total, event revenue contributed almost \$1,000,000 to fund ACMA programs and activities.
- ❖ ACMA's keystone event, COMPOSITES+POLYCON, had 183 exhibitors, 47 of which were new.
- ❖ Over 75 education sessions and technical paper sessions were presented at the COMPOSITES+POLYCON event.
- ❖ For the first time, CM Magazine writers reported live from the C+P Show and posted stories and photos to a blog dedicated to promoting the show.

Communications

- ❖ More than 10,000 readers subscribe to *Composites Manufacturing* (CM) Magazine.
- ❖ Reinvented old communications vehicles and developed new communications vehicles, including CM Magazine; *CM Interviews*, a weekly E-newsletter; *The Insider*, ACMA's members-only e-news-letter; The Official Composites 2010 conference blog and CM Magazine's Facebook and LinkedIn Profiles and Twitter feed, @cmmagazine.
- ❖ CM Magazine underwent a redesign that sharpened the publication's editorial focus and differentiated itself from competitors.



Goal: Proactively and Positively Affect Regulatory and Legislative Outcomes



Accomplishments Over the Past Year Include:

Styrene: ACMA-supported science shows that styrene exposure is not likely to cause cancer in humans. Advocacy with national and state regulators strongly supports classification and regulation of styrene consistent with the science. ACMA's Risk Communications Program helps small companies communicate with workers and plant neighbors on styrene health risk.

MACT: ACMA's extensive engineering and economic analyses demonstrated that EPA's Maximum Achievable Control Technology air emission standard for composites manufacturing should require effective and feasible pollution prevention measures and not, as EPA proposed, infeasible, expensive capture and oxidation control. Advocacy with EPA, OMB and Congress ensured agency attention to small business concerns. ACMA's MACT guidance helps the industry comply with this complex rule.

Emission factors: ACMA's emission test program uses EPA test methods in specially-constructed and instrumented labs to measure emissions from composites manufacturing operations. ACMA is accredited by the American National Standards Institute to promulgate the "UEF" emission factors as a National Standard using a canvas panel review process. Advocacy with EPA and state regulators gained acceptance of UEF factors for permitting, TRI reporting, and MACT compliance. ACMA's UEF program provides tools and guidance for composite manufacturers and regulators.

SCAQMD Rule 1162: ACMA's ongoing advocacy ensures that this VOC-control rule promulgated by Los Angeles-area regulatory agency South Coast Air Quality Management District, which has been widely copied by other California air districts and state regulators across the country, reflects effective and feasible controls for composites manufacturing operations.

Mission: Legislative and Regulatory

VOC control rules: ACMA's analysis demonstrated that composite manufacturing operations complying with the EPA MACT standard would meet the likely requirements of any rule established by state or local regulators to control VOCs in ozone non-attainment areas. Guidance helps companies complying with MACT avoid costly and uncertain case-by-case VOC control studies.

Texas fence-line limit: ACMA's analysis showed that an odor-based styrene screening limit proposed by the Texas Commission on Environmental Quality was 10-times more stringent than needed to reasonably protect against nuisance odor problems, 10-times more stringent than the odor limits enforced by any other industrial state, and 10-times more stringent than the industry could feasibly achieve. Advocacy with TCEQ and the Texas Legislature prevented adoption of the proposed limit, and the state clarified its policy granting construction permits for styrene emitting sources.

Scrap resin disposal: ACMA's advocacy resulted in the addition by EPA of POLYM (polymerization) to the list of hazardous waste treatment technologies approved for use by waste generators without being permitted as waste treatment facilities.

Worker styrene exposure limit: ACMA's advocacy resulted in recognition by US OSHA of a voluntary 50 ppm styrene worker exposure limit, to protect against the mild neurobehavioral effects that can occur above this level, and to prevent a costly and uncertain rulemaking by the agency. ACMA's analysis, submitted to Cal-OSHA, showed that a worker exposure limit below 50 ppm would result in widespread use of respirators, increased costs, and worker turnover, without any improvement in health or safety. Advocacy with the California Department of Occupational Safety and Health prevented adoption of a revised limit of 2 ppm, and resulted in significant improvements in the state's standards setting process.

Resin spray fire safety: Under the leadership of ACMA Founder and Past President Lowell Miles, advocacy resulted in adoption by the National Fire Protection Association of fire safety standards that are both effective and feasible for composites manufacturing operations. ACMA's analyses and tests supervised by independent fire safety engineers demonstrated that resin and gel coat spray operations complying with NFPA 33 do not present an unacceptable risk of fire and explosion. Advocacy with OSHA and US Congress resulted in OSHA recognition of the adequacy of NFPA 33 in lieu of the infeasible and overly stringent official OSHA standard.

Combustible dust: ACMA's analysis demonstrated that grinding dust from many composites manufacturing operations would likely "fail" the OSHA tests, triggering applicability of the NFPA combustible dust standard. Guidance helps industry members comply with the OSHA and NFPA requirements. ACMA advocacy helped prevent Senate approval of legislation that would have established costly new control requirements without providing any improvement in worker safety.



Goal: Promote the Development and Expansion of Markets for Composites Products

Accomplishments Over the Past Year Include:

ACMA has worked proactively to change and create new codes and standards that allow composites to be accepted by engineers, designers, specifiers and owners of facilities, so that composites can compete with steel, aluminum, wood, and concrete on a head-to-head basis. Examples of key successes this past year include:

- Developing a new section in the International Building Code which instructs building officials on use of composites for non-structural interior / exterior applications. A new addition to the code has been submitted to counter efforts of other interest groups who wish to remove composites use on buildings in the code.
- Completing the first draft of a design standard for pultruded composites used in construction. This multiyear project with the Pultrusion Industry Council is targeted at structural engineers who work on a daily basis with steel, wood, and aluminum.
- Supported development of an updated American Concrete Institute design guide specification for strengthening and repairing concrete structures. This has huge implications in today's cash strapped world where using composites can provide building and transportation structure owners a very economical tool to enhance the service life of their structures.
- Supported development of American Concrete Institute material and construction standards for FRP bars used in reinforced concrete. These are important tools for engineers to specify composites to compete with steel.
- Supported development of a new American Concrete Institute design guide specification for strengthening and repairing masonry structures. This will be an important resource for contractors and building engineers when trying to repair masonry structures.

Staff and members promoted composites and educated users, potential users, legislators, and others on the benefits of composites. Examples of key successes this past year include:

- Coordinated the development of a DVD for the Transportation Structures Council to introduce and educate legislators, engineers, specifiers on composites impact in infrastructure renewal.
- Coordinated the development of a technical workshop on composites to educate bridge engineers on the value of specifying composites to upgrade existing and building new bridge structures.
- Coordinated networking events with the automotive industry to develop new relationships in this market.

Mission: Market Growth

Priorities for Market Growth in FY 09-10

- Expand the use of composites in the International Building Code.
- Finalize design standard for pultruded composites and supporting test method development.
- Support division, alliances, and councils in marketing and educating end-users on composites in target markets.
- Support development of design specifications of composites used in concrete structures.
- Conduct legislative visits to educate and inform Congress on composites impact for infrastructure renewal.

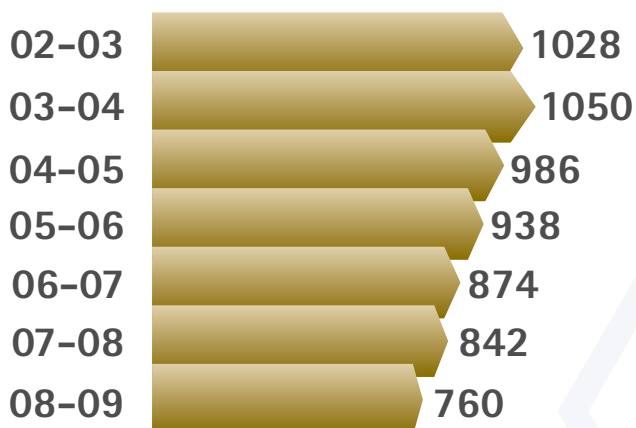
TOTAL REVENUES AND EXPENSES

	Revenues	Expenses
ACMA (not including Divisions, Alliances and Councils)	\$3,735,817	\$3,877,605
International Cast Polymer Alliance	\$144,677	\$249,028
COMPOSITES & POLYCON	\$1,518,454	\$861,968
CM Magazine and CPC Magazine	\$608,308	\$851,698

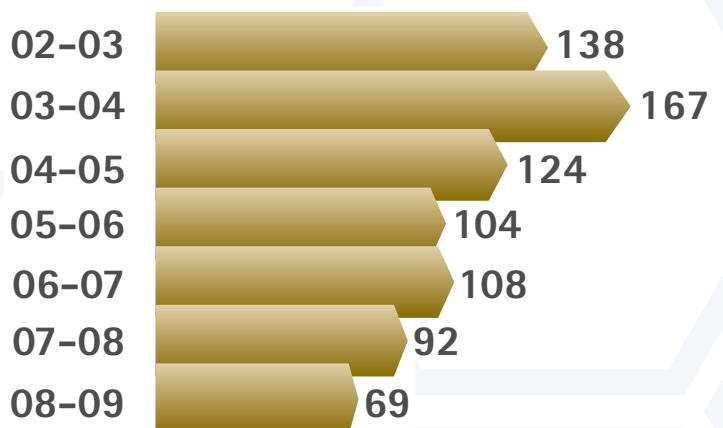
Membership Information

Membership: 69 new members

ACMA Membership 2008-2009



New Members 2008-2009



ACMA Board of Directors 2009 – 2010

Executive Committee

PRESIDENT

Monty Felix
Alaglass Pools

PRESIDENT-ELECT/TREASURER

Lori Luchak , CCT
Miles Fiberglass
& Composites

IMMEDIATE PAST PRESIDENT

John Tickle, CCT
Strongwell

VICE PRESIDENT

Steve Walling
Plasticolors Incorporated

SECRETARY

John Hoskinson,
CCT-I, SS, CP
Gruber Systems

SUPPLIER AT LARGE

Leon Garoufalis
Composites One LLC

Directors

Jake Axel

Axel Plastics
Research Labs, Inc.

Gregory Benckart

PPG Industries

Paul Colonna

Cook Composites

Jeff Craney

Crane Composites

Jeff Davis

Owens Corning

Peter Emrich CCT-CM

Molded Fiber Glass
Companies

John Gaither

Reichhold Inc.

David Groner , CCT

Clarion Bathware

Tim Hill , CCT

Syn-Mar Products

Tom Meola

Premix Inc.

Jay Merrell

IDI Composites International

Roger Mola

Fiber-Tech Industries

Wes Nan

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