



The Economic Impact of the U.S. Cleaning Products Industry

2026



PREPARED BY:



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Executive Summary

The U.S. cleaning products industry is a major contributor to the nation's economy, **directly generating \$88.5 billion in economic activity and employing nearly 65,000 workers**. Further, companies throughout the sector are the cornerstone of a broader network of suppliers, service providers, and consumer-facing businesses, with **the total economic impact of the cleaning products industry exceeding \$103 billion**. This boon to the nation's economy supports nearly 125,000 total jobs, with hardworking Americans across the cleaning products supply chain taking home more than \$15 billion in wages in 2025.

DIRECT ECONOMIC OUTPUT

\$88.5 billion

Generated by cleaning products companies

TOTAL ECONOMIC OUTPUT

\$103.6 billion

Direct, indirect and induced impact

DIRECT JOBS

65,000

Employment within the industry

TOTAL JOBS SUPPORTED

125,000

Employment across the cleaning products supply chain

Several long-term economic and industry trends are influencing the evolution of the U.S. cleaning products industry:

- **Innovation and sustainability.** Ongoing advances in chemistry, product formulation, manufacturing technology, and packaging are driving product performance, resource efficiency, and more sustainable solutions that respond to evolving customer expectations and regulatory requirements.
- **Trade and Competitiveness:** The U.S. cleaning products industry is a net exporter of finished cleaning product goods, exporting more products globally than it imports. This trade surplus highlights the international competitiveness of U.S. manufacturers and reflects strong global demand for American-produced cleaning, hygiene, and sanitation products.
- **Industry resilience:** The cleaning products supply chain has maintained strong employment impact despite persistent macroeconomic headwinds
- **Consumer and business demand.** Growth in population, commercial activity, healthcare, and institutional services, as well as moderate increases in household income, continue to support demand for cleaning and hygiene products across consumer and professional markets.

- **Input costs and supply chain resilience.** While inflationary pressures and supply chain disruptions have moderated since their pandemic-era peak between late 2021 and early 2022, manufacturers continue to adapt to higher labor costs, pursue evolving sourcing strategies, and make long-term investments that improve supply chain resilience and operational efficiency.
- **Regulatory and trade environment.** Companies across the sector are navigating evolving federal and state regulations, chemical management policies, environmental standards, and international trade conditions, which continue to influence production costs, investment decisions, and the competitive landscape even as businesses work to innovate and thrive.

This report tells the story of an industry that has transitioned from the extraordinary demand conditions experienced during the COVID-19 pandemic to a more stable, long-term growth trajectory. **The cleaning products sector is thriving**, with 125,000 workers and \$103 billion in economic output across the supply chain—and the future is bright, driven by continued product innovation, investments in domestic manufacturing, increased supply chain resilience, and heightened consumer awareness of cleaning products’ role in protecting Americans’ lives and livelihoods.

Introduction

The American Cleaning Institute (ACI) represents the U.S. cleaning products supply chain, including manufacturers and formulators of soaps, detergents, and household, commercial, industrial, and institutional cleaning products, as well as suppliers of ingredients, packaging, and chemical distribution services.

To demonstrate the industry's economic importance, ACI commissioned Euromonitor International to quantify the economic footprint of the U.S. cleaning products industry using comprehensive industry data and economic impact modeling. **This report measures the industry's direct, indirect, and induced contributions to the U.S. economy** while providing forward-looking projections through 2030. The analysis is designed to support policymaking, stakeholder engagement, and strategic planning by presenting a data-driven assessment of the industry's economic value.

Specifically, the report:

- Quantifies the industry's **economic impact** at the national, state, and congressional district levels.
- Measures **employment, labor income, value added, and total economic output**.
- Estimates federal and state/local **tax contributions**.
- Examines **international trade**, including exports, imports, and the net trade balance.
- Summarizes **industry performance** and **forecasts the industry's outlook through 2030** based on anticipated industry and macroeconomic trends and possible alternative scenarios.

The report uses two complementary data sources to present a fuller view of the industry. The economic impact estimates in the **National and State Economic Impact Analysis** sections—including jobs, wages, output, value added, and tax contributions—are based on industry-wide revenue across the North American Industry Classification System (NAICS) codes that make up the U.S. cleaning products sector. These estimates capture manufacturer sales to retail, institutional, industrial, and business-to-business (B2B) channels and are modeled using an input-output framework that measures indirect supplier impacts and induced impacts from employee spending across the value chain.

In contrast, the category and product-level sales figures in the **Industry Overview** section—Bleach, Dishwashing, Fabric Care, Polishes, and Soaps and Sanitizers—reflect U.S. consumer retail sales only, sourced from Euromonitor's Passport Database (Appendix C).

INDUSTRY AND PRODUCT SCOPE

To quantify the economic impact of the products manufactured and distributed by ACI members, this report defines the industry's scope across five core NAICS codes. Note that only portions of the five core NAICS codes are included within this report, so as to accurately convey the cleaning products sector's share of each code. These are referred to as the 'ACI Product Scope,' with the ACI industry shares noted below referring to the specific portions captured by ACI's remit. Further details may be found in Appendix B.

- **Soap and Other Detergent Manufacturing** (NAICS 325611) — 91.4% ACI industry share
- **Polish and Other Sanitation Good Manufacturing** (NAICS 325612) — 69.0% ACI industry share
- **Surface Active Agent Manufacturing** (NAICS 325613)— 100.0% ACI industry share
- **Other Basic Inorganic Chemical Manufacturing** (NAICS 325180) — 26.4% ACI industry share
- **All Other Basic Organic Chemical Manufacturing** (NAICS 325199) — 15.6% ACI industry share

This analysis utilizes the industry-standard IMPLAN input-output model, widely regarded by governments, academics, and companies as a leading framework for modeling impacts distributed through the economy at regional and national level in the U.S.

Economic Impact Analysis

The U.S. cleaning products industry generated **\$88.5 billion in direct economic output** and **nearly 65,000 jobs** in 2025.

ECONOMIC OUTPUT

Output, in economic terms, refers to the total value of all goods and services produced by an industry, and may be separated into direct, indirect, and induced output.

- **Direct output** is the initial, immediate business revenue generated by an industry's own production.
- **Indirect output** is the supply chain ripple effect from business-to-business purchases of raw materials, packaging, and services.
- **Induced output** results from workers—both at cleaning products companies and at their suppliers—spending their earned wages on local goods and services, from groceries to housing.

The total direct economic output for the U.S. cleaning products industry in 2025 was approximately \$88.5 billion in current dollars. Including indirect and induced effects, the total economic impact of the U.S. cleaning products industry reached **\$103.6 billion in 2025**, while supporting **nearly 125,000 jobs nationally**. Every \$1.00 of direct cleaning products output supported approximately \$1.17 in total economic activity across the U.S. economy. The additional 17 cents reflects activity supported through purchases from suppliers and spending by workers whose jobs are sustained by the industry.

Summary of Economic Impact Analysis

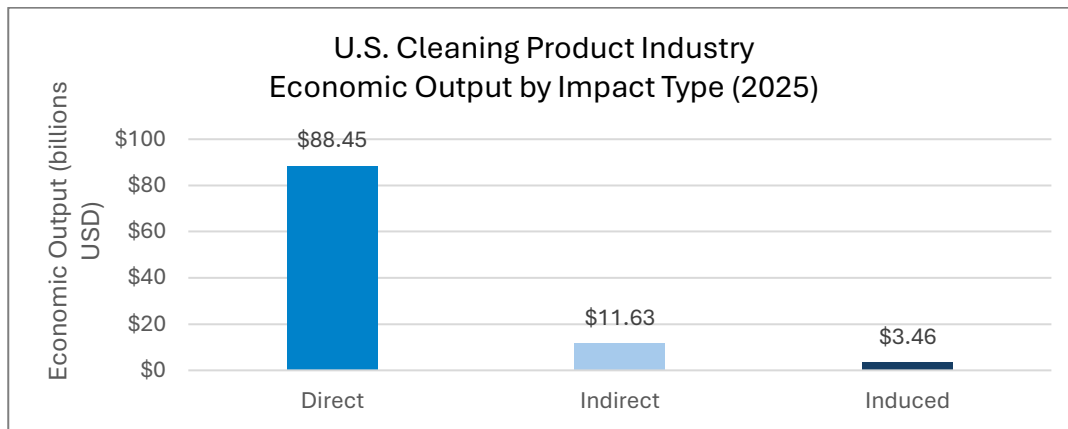
	Output	Employment
Direct	\$88.5 billion	64,681
Indirect	\$11.6 billion	40,987
Induced	\$3.5 billion	18,630
Total	\$103.6 billion	124,298

Source: Euromonitor International analysis using the IMPLAN modeling framework.

The **\$88.5 billion in direct output** is heavily concentrated in finished-product manufacturing rather than chemical inputs. Soap and other detergent manufacturing alone generated \$38.5 billion in direct output, representing 43.5% of the industry's entire direct footprint—by far the largest of the five in-scope segments.

The two chemical-input segments—other basic inorganic chemical manufacturing (\$15.1 billion) and other basic organic chemical manufacturing (\$14.4 billion)—together contribute another \$29.5

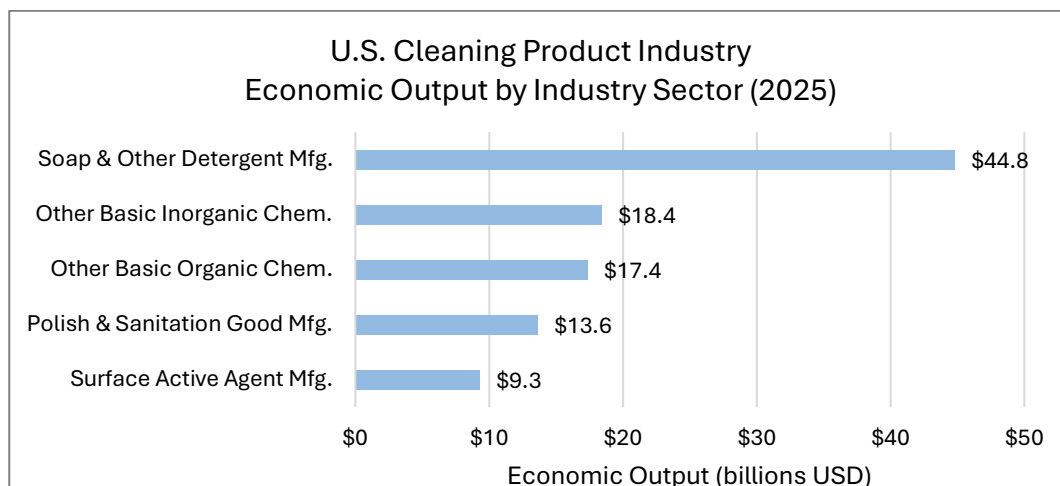
billion, forming the raw-material backbone (caustic soda, sulfuric acid, fatty acids, synthetic alcohols) that soap, detergent, and surfactant producers depend on. Polish and other sanitation goods manufacturing (\$11.9 billion) and surface-active agent manufacturing (\$8.5 billion) round out the remaining direct output.



Source: Euromonitor International analysis using the IMPLAN modeling framework.

The \$15.1 billion ripple: Indirect and induced effects

Beyond the **\$88.5 billion** in direct output, the industry generates an additional \$15.1 billion through indirect and induced channels—\$11.6 billion in indirect output (supply chain purchases by manufacturers) and \$3.5 billion in induced output (spending by workers throughout that supply chain). This represents a modest 17% uplift on output overall, but the employment story is far more dramatic: Total employment (124,298) is nearly double direct employment (64,681)—a 1.92x employment multiplier—meaning the industry's supply chain supports almost as many jobs as its own direct manufacturing operations.



Source: Euromonitor International analysis using the IMPLAN modeling framework.

This divergence between the output multiplier (1.17x) and employment multiplier (1.92x) tells an important story: Cleaning products manufacturing is capital- and output-intensive at the direct level, but the supply chain that supports it—raw material and chemical input suppliers, packaging

producers, and other business-to-business vendors—is disproportionately labor-intensive, employing more people per dollar of output than the manufacturers themselves.

Soap and other detergent manufacturing is the largest segment by direct output and direct employment (25,477 jobs) and generates a substantial employment multiplier (1.97x), reflecting its dual role as both a major direct employer and a significant driver of induced spending from its large, wage-earning workforce.

EMPLOYMENT

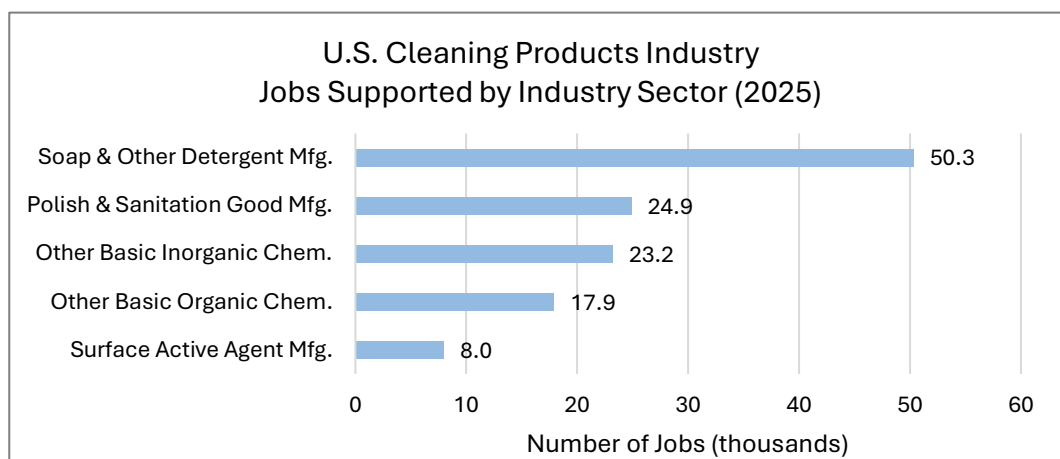
Direct employment in the U.S. cleaning products industry totaled **64,681 jobs** in 2025. Including indirect and induced effects, total employment supported by the U.S. cleaning products industry reached **124,298 jobs** in 2025, reflecting an employment multiplier of **1.92x**: for every direct job at a cleaning products manufacturer, nearly one additional job is supported elsewhere in the economy.

In more tangible terms, for every 10 jobs directly employed by cleaning products manufacturers, approximately nine additional jobs are supported elsewhere in the economy. These additional jobs are found among suppliers serving the industry and in businesses supported by the household spending of direct and supply chain workers.

The cleaning products supply chain has maintained strong employment impact despite persistent macroeconomic headwinds: **Elevated input costs, energy market volatility, and tariff-related cost pressures** have squeezed manufacturer margins, while continued **consolidation among retail customers** has intensified price competition. Facing these pressures, manufacturers have generally responded by tightening operational overhead rather than expanding headcount, reinforcing the productivity-driven employment trend already underway.

Where the jobs are: A tale of two employment profiles

Employment is not evenly distributed across the industry's five segments, and the pattern of direct versus supported (indirect + induced) jobs tells two very different stories depending on the segment.



Source: Euromonitor International analysis using the IMPLAN modeling framework.

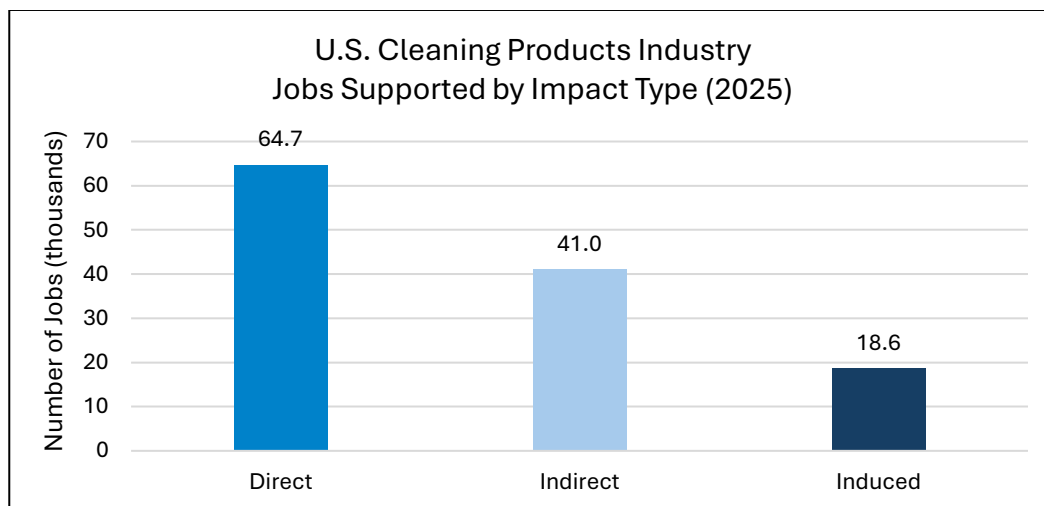
Soap and other detergent manufacturing is both the largest direct employer (25,477 jobs, 39.4% of all direct industry employment) and the largest total employer (50,311 jobs supported, 40.5% of

the total), with a solid employment multiplier of 1.97x. This segment's scale means it anchors the industry's overall employment footprint more than any other.

Polish and other sanitation good manufacturing is the second-largest direct employer (17,491 jobs, 27.0% of direct employment) but has the lowest employment multiplier in the industry at 1.42x—meaning its supply chain and induced spending effects are comparatively modest relative to its direct workforce. This suggests a segment that is itself labor-intensive at the point of manufacture, rather than one that generates outsized ripple effects through suppliers.

Other basic organic chemical manufacturing tells the opposite story. It is the *smallest* direct employer of the five segments (5,775 jobs, just 8.9% of direct employment), yet it has the **highest employment multiplier in the industry by far at 3.10x**—its indirect employment (9,591 jobs) actually exceeds its own direct employment. This segment relies heavily on a wide network of specialty chemical suppliers (fatty acid esters, synthetic organic alcohols, flavor and perfume materials), and each dollar of its output pulls a disproportionate number of jobs into the broader supply chain. As a result, this segment's *total* footprint (17,923 jobs supported, 14.4% of the industry total) is nearly double its direct share—the starkest example in the industry of how supply-chain linkages can matter more than direct headcount.

Other basic inorganic chemical manufacturing (11,316 direct jobs) and **surface-active agent manufacturing** (4,622 direct jobs) round out the industry, with employment multipliers of 2.05x and 1.72x respectively, reflecting their continued reliance on chemical-supplier networks, though less dramatically than the organic chemicals segment.



Source: Euromonitor International analysis using the IMPLAN modeling framework.

A geographically concentrated workforce

Employment is also heavily concentrated geographically. The **top 10 states**—led by Ohio (15,403 jobs), Missouri (7,646), Texas (7,106), Pennsylvania (5,754), and Wisconsin (5,664)—together account for **67,359 jobs, or 54.2% of jobs supported by the sector**, reflecting the industry's historical clustering around dense chemical manufacturing infrastructure and centralized freight networks in the Midwest and South.

Although the industry supports employment across all 50 states, more than half of its total employment footprint is concentrated in the 10 leading states. This pattern illustrates how established manufacturing capacity, supplier networks, and transportation infrastructure can amplify the industry's contribution within regional economies.

Top 10 States for Total and Direct Employment

State	Total Employment	Direct Employment
Ohio	15,403	7,310
Missouri	7,646	3,760
Texas	7,106	4,332
Pennsylvania	5,754	2,702
Wisconsin	5,664	3,332
South Carolina	5,635	2,637
North Carolina	5,133	3,142
Illinois	5,045	3,934
California	5,022	4,019
Michigan	4,951	2,515

Source: Euromonitor International analysis using the IMPLAN modeling framework.

LABOR INCOME AND WORKFORCE EARNINGS

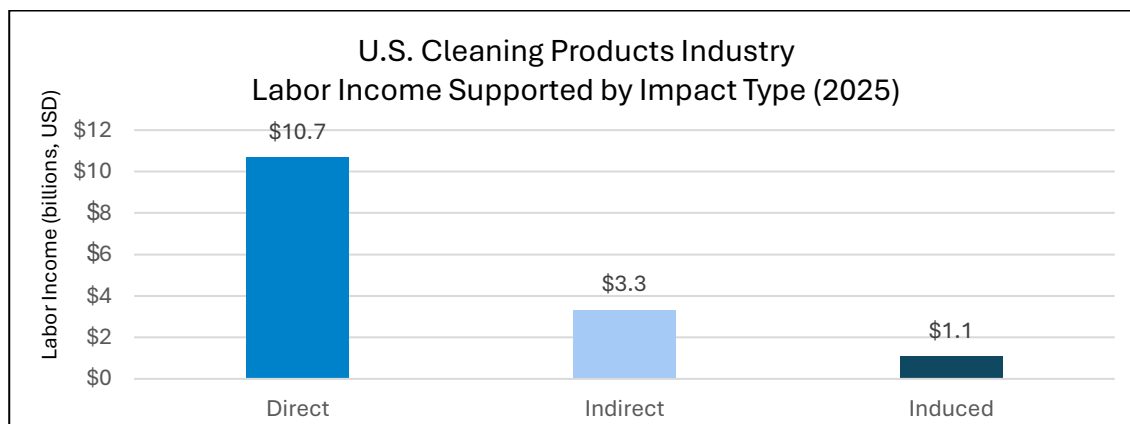
The U.S. cleaning products industry supports **approximately \$15.1 billion in labor income** across the American economy. These earnings include wages, salaries, benefits, and proprietor income earned not only by employees working directly within cleaning products manufacturing, but also by workers throughout the industry's supplier network and the broader economy supported by household spending. Direct activity generates approximately **\$10.7 billion in labor income**, while indirect and induced effects contribute an additional **\$4.4 billion**, reflecting the industry's extensive economic reach.

Labor income provides one of the clearest measures of how economic activity translates into benefits for American workers. While output measures the value of goods and services produced, labor income reflects money flowing directly into households through paychecks and business earnings. These earnings support consumer spending, strengthen local economies, and generate additional economic activity in communities across the country.

The cleaning products industry supports earnings across a wide range of occupations. Direct labor income is generated by workers involved in manufacturing, research and development, engineering, logistics, administration, and management. Beyond the factory floor, supplier industries such as chemicals, packaging, transportation, utilities, warehousing, and professional services also benefit from industry spending. Household spending by these workers further supports labor income in retail trade, healthcare, restaurants, housing, education, and other local service industries.

Direct activity accounts for approximately **71% of all labor income supported by the industry**, highlighting the strong wage-generating capacity of domestic manufacturing operations. Indirect

and induced effects account for the remaining 29%, demonstrating how economic benefits extend well beyond manufacturing facilities to support workers throughout supplier networks and local communities. The industry's labor income multiplier of approximately **1.41x** indicates that every dollar of labor income generated directly by cleaning products manufacturers supports an additional 41 cents elsewhere in the economy.

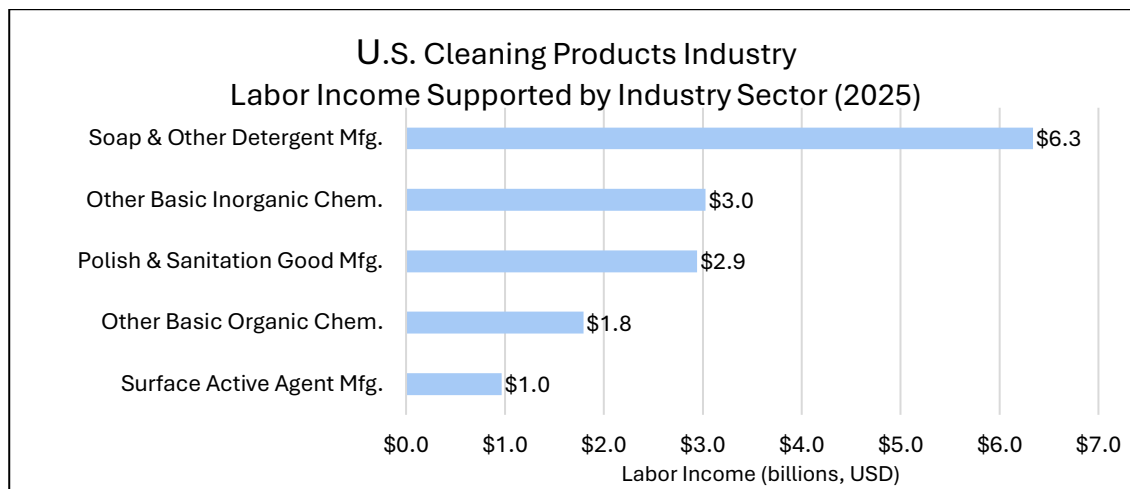


Source: Euromonitor International analysis using the IMPLAN modeling framework.

Soap and Detergent Manufacturing Drives the Largest Share of Industry Earnings

Labor income is concentrated among the industry's largest segments. **Soap and other detergent manufacturing** supports approximately **\$6.3 billion in labor income**, accounting for more than 40% of all wages and income supported by the sector. This reflects both the segment's scale and its extensive network of suppliers and supporting industries.

Other major contributors include **other basic inorganic chemical manufacturing** (\$3.0 billion), **polish and sanitation good manufacturing** (\$2.9 billion), and **other basic organic chemical manufacturing** (\$1.8 billion). Together, these segments illustrate how the industry's economic importance extends beyond finished cleaning products to include the upstream chemical and ingredient supply chains that support domestic production.



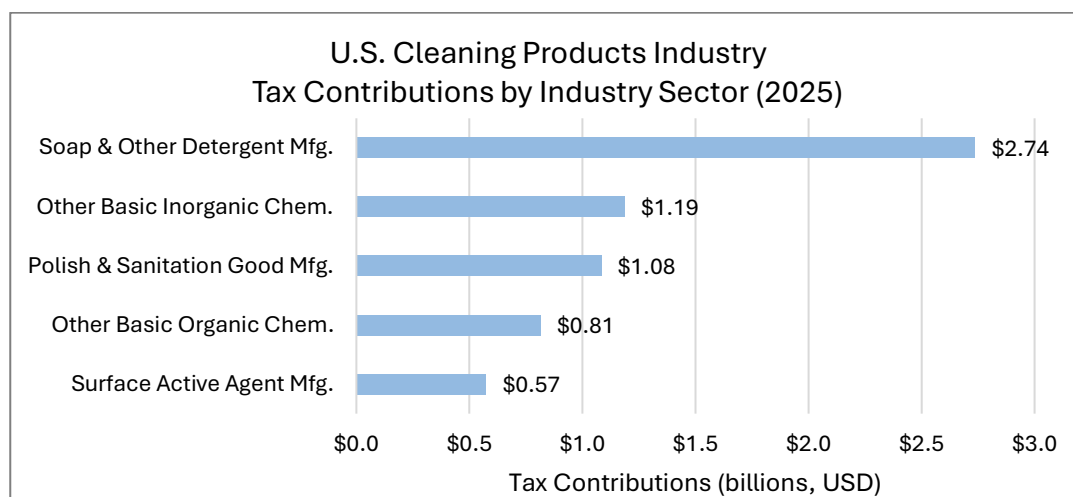
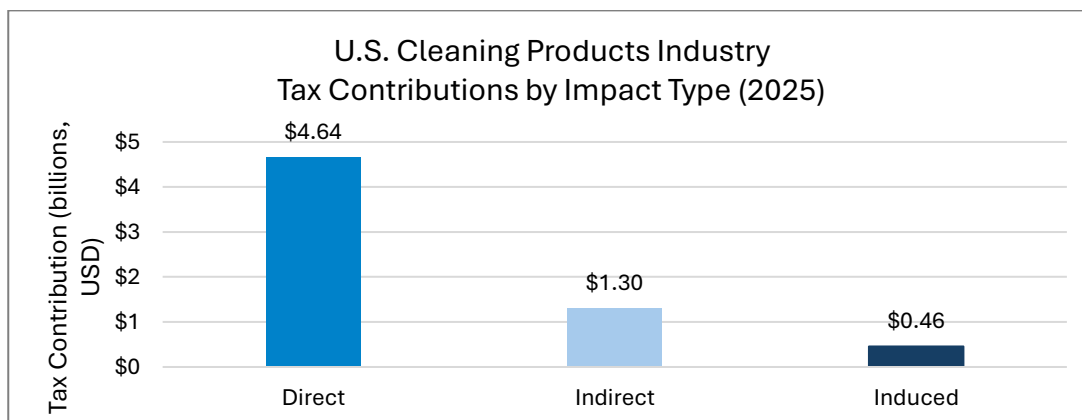
Source: Euromonitor International analysis using the IMPLAN modeling framework.

TAX CONTRIBUTION

The U.S. cleaning products industry generated **\$6.4 billion in federal, state, and local tax revenue** in 2025, equivalent to roughly **6.2% of total industry output**. As with employment and labor income, tax contribution is concentrated in direct activity: Direct operations account for \$4.6 billion (72.6%) of the total, with indirect (\$1.3 billion, 20.3%) and induced (\$0.5 billion, 7.1%) effects contributing the balance.

Viewed another way, the industry's economic activity generated approximately \$1 in federal, state, and local tax revenue for every \$16 of total output supported. This contribution arises not only from cleaning products manufacturers, but also from the suppliers and household economic activity connected to the industry's broader footprint.

Tax intensity—the share of output converted into tax revenue—varies by segment. **Polish and other sanitation good manufacturing** generates the highest tax contribution relative to its output (7.95%), generating more taxable economic activity per dollar produced. **Other basic organic chemical manufacturing** sits at the opposite end, contributing the lowest share of output as tax revenue (4.69%), reflecting the same input-heavy cost structure that also depressed its value-added and labor-income figures.



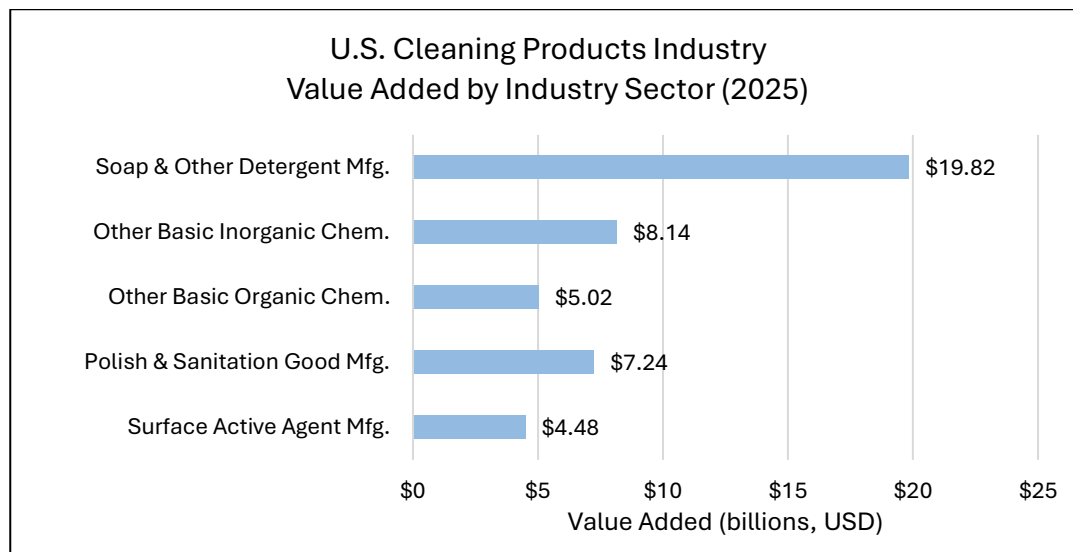
Source: Euromonitor International analysis using the IMPLAN modeling framework.

VALUE ADDED

Value added measures the cleaning products industry's contribution to U.S. gross domestic product (GDP). It is the portion of industry output remaining after subtracting the cost of intermediate goods and services purchased from other businesses. Value added consists of employee compensation, taxes on production and imports, and gross operating surplus, including business profits and other property income.

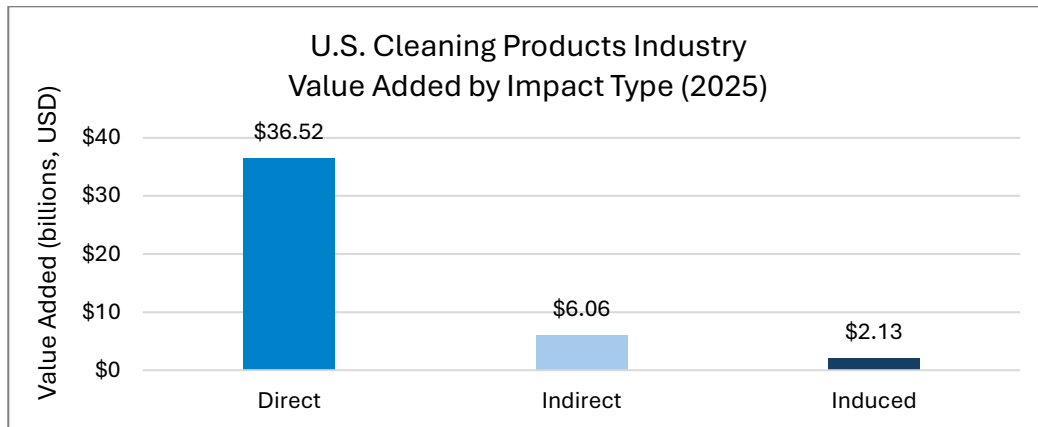
This measure matters because it shows how much new economic value the industry creates through workers' earnings, business income, and tax contributions, rather than simply reporting the gross value of sales and production. Value added is included within economic output and should not be added to output as a separate impact.

In 2025, the U.S. cleaning products industry contributed \$44.7 billion to U.S. GDP through direct, indirect, and induced activity. This represented approximately 43% of the industry's \$103.6 billion in total economic output. In practical terms, about 43 cents of every dollar of output reflected labor income, business income, and taxes on production and imports, while the remainder reflected intermediate goods and services purchased to support production. Direct activity accounted for \$36.5 billion, or 81.7%, of total value added, with indirect activity contributing \$6.1 billion and induced activity contributing \$2.1 billion.



Source: Euromonitor International analysis using the IMPLAN modeling framework.

The share of output represented by value added varies across the five industry segments, reflecting differences in their production structures and reliance on purchased inputs. Polish and other sanitation good manufacturing recorded the highest value-added share of output at 53.1%, followed by surface active agent manufacturing at 48.1%. Other basic organic chemical manufacturing recorded the lowest share at 28.9%, indicating that a larger portion of its output is associated with intermediate chemical inputs purchased from other businesses. In dollar terms, soap and other detergent manufacturing was the largest contributor, accounting for \$19.8 billion, or 44.3%, of total industry value added.



Source: Euromonitor International analysis using the IMPLAN modeling framework

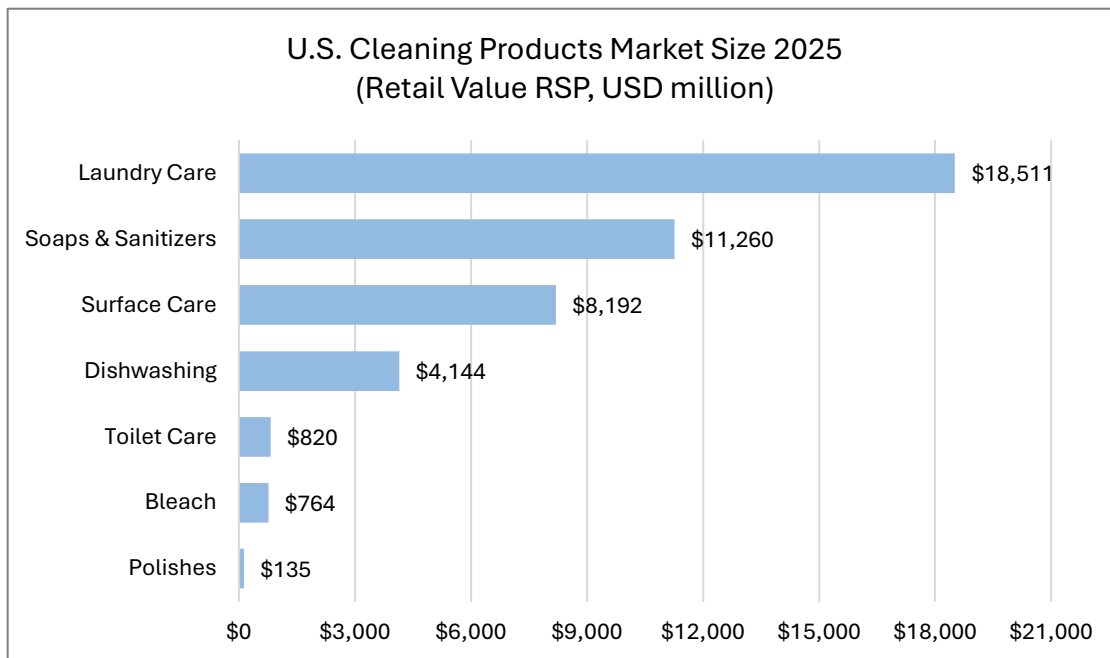
Industry Overview

U.S. consumer retail sales of cleaning products reached \$43.8 billion in 2025 (+3.1%), led by fabric care (\$18.5 billion). Multifunctional, premium, and e-commerce-friendly product formats are reshaping every category.

The following section provides a detailed analysis of the **current and forecast U.S. cleaning products industry** from a consumer retail sales perspective, where category and products sales figures refer specifically to consumer retail sales. Namely, they represent only a component of the overall economic impact along the supply chain, which includes both B2B industrial and consumer sales.

SIZE AND GROWTH OF CLEANING PRODUCTS MARKET

Combined, U.S. cleaning products recorded modest 3.1% compound annual growth rate (CAGR) between 2020 and 2025, reaching a total of \$43.8 billion. This performance was supported by some economic stabilization in 2025—inflation easing to around 3% and a slight increase in median household disposable income from the previous year.



Source: Euromonitor International Passport Market Database

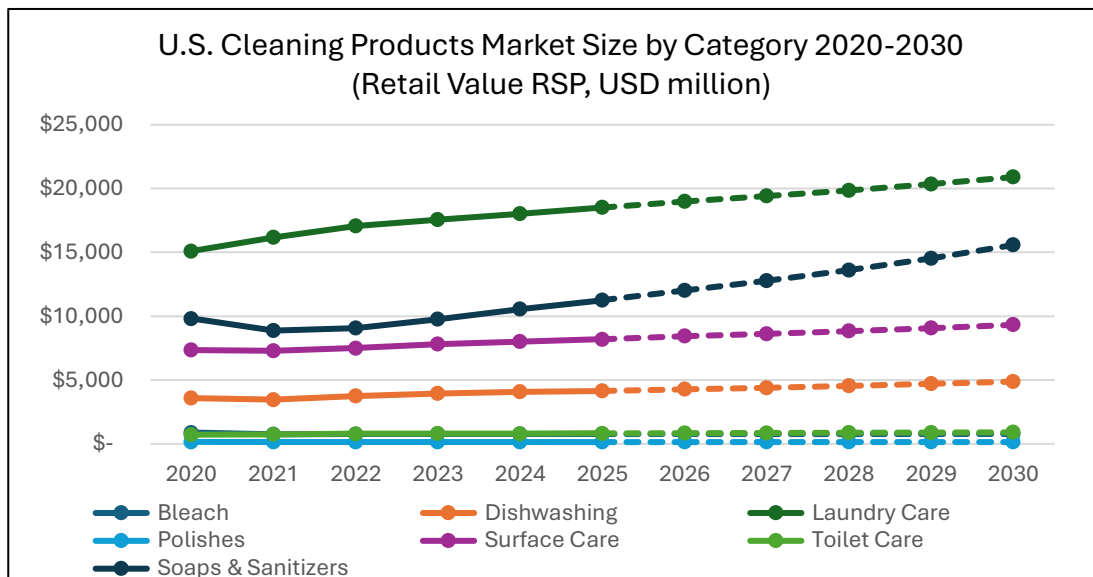
Euromonitor International forecast data indicates the industry will grow at a 3.7% compound annual growth rate (CAGR) through 2030. However, economic uncertainty could moderate this outlook. Consumer prices remained elevated, with the U.S. Consumer Price Index (CPI) rising 3.4% over the 12 months ending in July 2026, while ongoing trade tensions and the potential escalation of

conflict around the Strait of Hormuz continue to create risks for manufacturers and consumers alike.



Source: Euromonitor International Passport Market Database

A significant driver of demand for cleaning products remains the high penetration of domestic appliances, with dishwasher and washing machine ownership reaching 77% and 88% of households, respectively. Consequently, fabric care maintained its status as the industry's largest category in 2025, valued at \$18.5 billion, as consumers sought high-performance consumables for their established appliance bases.



Source: Euromonitor International Passport Market Database

Time-constrained U.S. consumers are moving away from specialized, single-task products in favor of “all-in-one” solutions that combine cleaning, disinfection, and deodorization. This trend is most visible in fabric care, where leading brands have integrated stain removal and brightening into formulations optimized for energy-efficient cold- and quick-wash cycles. Similarly, in declining categories such as Polishes, multi-surface variants are replacing traditional specialized treatments as consumers look to reduce clutter and maximize the cost-per-use of every purchase.

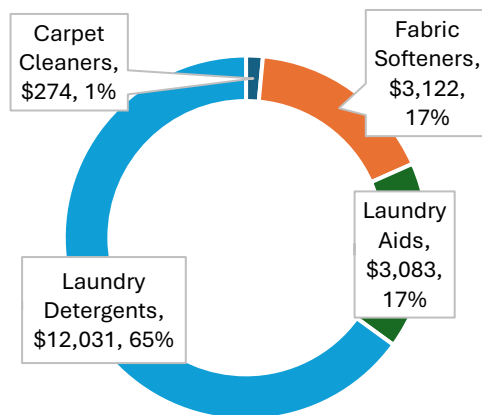
For manufacturers operating within the mature U.S. home care landscape, the transition toward product consolidation and multifunctional innovation offers a vital strategic pathway for defending market share. By providing tangible time-saving benefits and diverse functional advantages, brands can justify premium price points even as consumers remain cautious regarding their total expenditure. This evolution is indicative of a broader consumer shift toward domestic efficiency and enhanced sensorial value, where the ability to harmonize high-performance cleaning with modern lifestyle requirements—such as rapid execution and environmental compatibility—has become a primary determinant of commercial success.

As individual products become consolidated into multi-functional products, growth in volume sales is expected to slow. However, with brands charging premium price points for these new products, value sales will continue to rise, albeit relatively slowly.

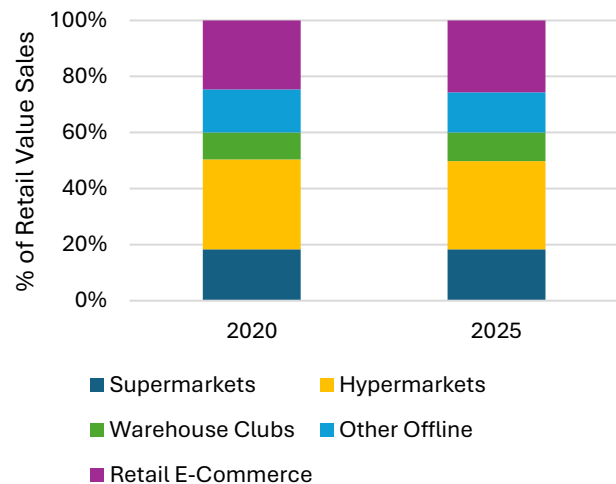
FABRIC CARE

Fabric care is the largest of the six categories of cleaning products (fabric care, dishwashing, surface care, toilet care, polishes, and soaps and sanitizers) by a wide margin, with U.S. retail value sales reaching **\$18.5 billion** in 2025, up 3% year-over-year in current terms. Within the category, **laundry aids** (scent boosters, fabric softeners, and pre-treatments) were the best-performing subcategory, growing 4% year-over-year to **\$3.1 billion**, as consumers increasingly layer premium fragrance products onto their base detergent purchase rather than trading up on the detergent itself. The category is expected to sustain this pace through 2030, reaching **\$20.9 billion** at a 3% CAGR, aided by rising median household disposable income.

U.S. Fabric Care Market Size 2025
(billions USD. % share)



U.S. Fabric Care Channel Distribution
2020–2025
(% Retail Value Sales)



Source: Euromonitor International Passport Market Database

The most interesting dynamic in fabric care is its growing **polarization**: Affluent households are trading up to multifunctional, concentrated, and fragrance-forward formats, while price-sensitive consumers are shifting toward private label and waiting for promotional periods—both trends growing simultaneously, rather than one crowding out the other. A parallel innovation thread is the emergence of **pet-specific laundry formulations** (hair-dissolving powders, odor and stain treatments safe for pet bedding), a small but telling sign of how manufacturers are segmenting a historically undifferentiated category.

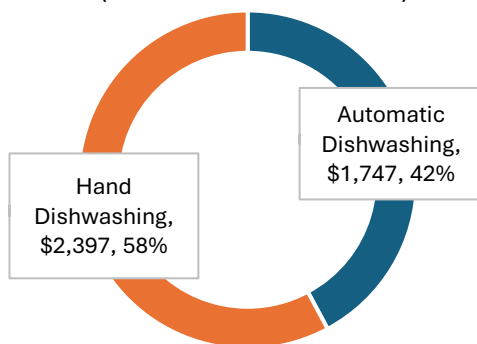
In terms of **distribution**, hypermarkets and supermarkets remain dominant with a combined **50% value share (\$9.2 billion)**, reflecting continued consumer preference for in-person inspection during routine grocery trips, while warehouse clubs hold **10%** on the strength of bulk pricing. Retail e-commerce has grown steadily to **26% share (\$4.8 billion)**, aided by the rise of shippable, compact formats like sheets and pods that reduce the weight and breakage concerns that once limited online laundry sales.

DISHWASHING

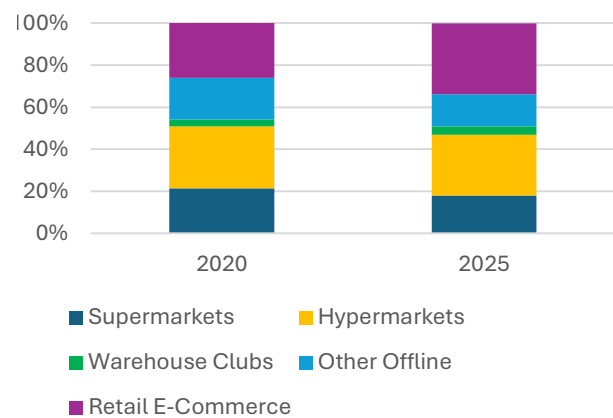
Dishwashing is a comparatively small category at **\$4.1 billion** in 2025, growing a modest 1% year-over-year, with **hand dishwashing** the larger and better-performing of the two subcategories (\$2.4 billion, +2% year-over-year) versus automatic dishwashing (\$1.8 billion, +1% year-over-year). Growth is forecast to accelerate slightly to a 3% CAGR through 2030 (\$4.9 billion), and notably, **automatic dishwashing is expected to become the more dynamic performer going forward** (5% CAGR), a reversal of the current growth ranking driven by rising dishwasher ownership among a growing urban population.

A distinctive storyline here is the tight coupling between **product innovation and appliance technology**—manufacturers are increasingly designing detergent formulations specifically to perform in shorter, energy-efficient wash cycles and without pre-rinsing, essentially partnering with appliance functionality rather than innovating on cleaning chemistry alone. This "skip the rinse" positioning serves double duty as both a water-conservation message and a convenience play for time-pressed households. Looking further out, the category is expected to move toward **smart-home integration**, with dishwashers and detergent dosing anticipated to become increasingly automated and app-connected.

U.S. Dishwashing Market Size 2025
(billions USD. % share)



U.S. Dishwashing: Channel Distribution
2020–2025
(% Retail Value Sales)

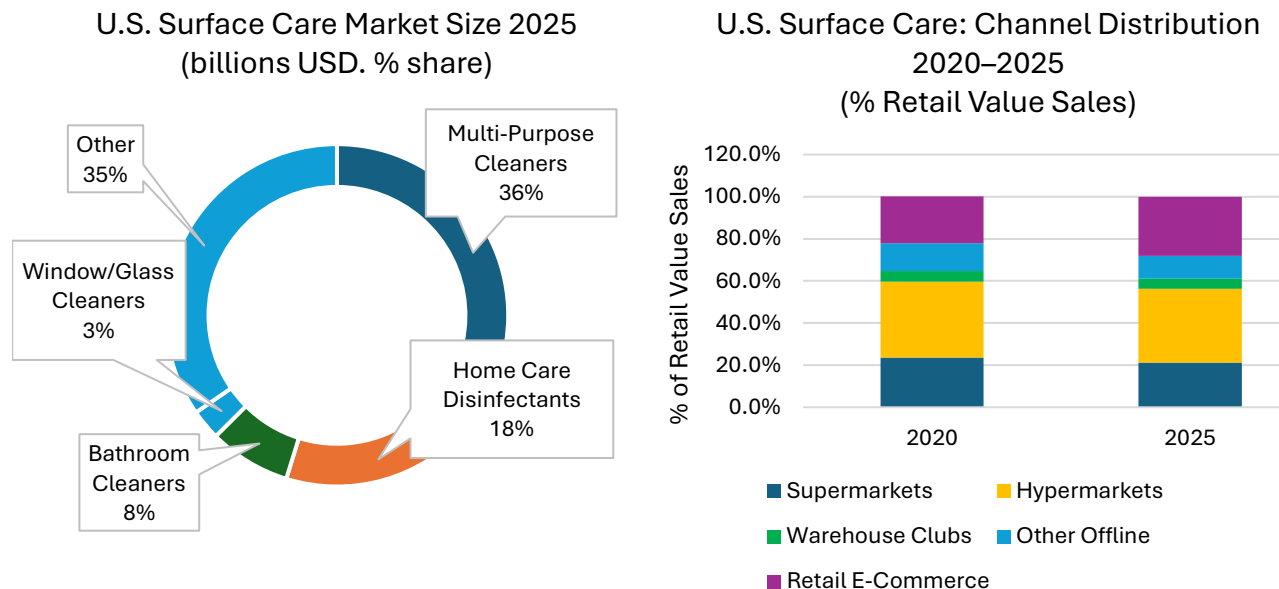


Source: Euromonitor International Passport Market Database

On **distribution**, offline retail still leads with a **66% value share**, but e-commerce has reached **34%**, aided by the fact that lightweight tablet and pod formats ship more easily and with less leakage risk than traditional liquid detergents—a structural advantage that has made dishwashing one of the more e-commerce-friendly categories in the portfolio.

SURFACE CARE

Surface care reached **\$8.2 billion** in 2025, growing 2% year-over-year, with **multi-purpose cleaners** the clear category leader at **\$3.0 billion** (+3% year-over-year) and **bathroom cleaners** the fastest-growing subcategory (+5% year-over-year to \$633 million). The category is forecast to grow to **\$9.8 billion** by 2030 (3% CAGR), with multi-purpose cleaners expected to remain the anchor category, reflecting a broader "back-to-basics" consumer preference for versatile, all-in-one solutions over specialized single-task products.



Source: Euromonitor International Passport Market Database

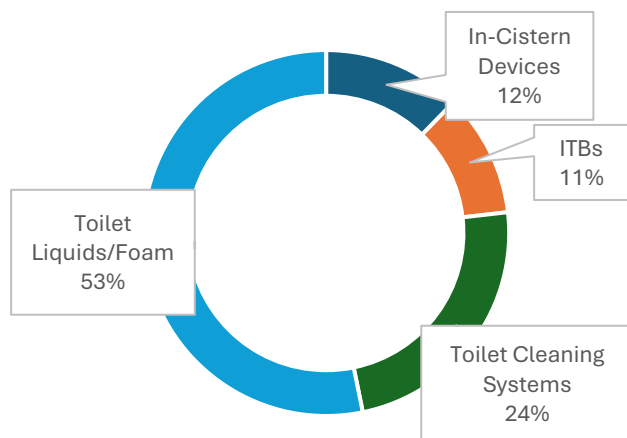
The most novel storyline in surface care is the emergence of **microbial-based cleaning products**—bearing a distinct mechanism of action (using beneficial microorganisms to enhance cleaning performance), marketed around non-toxic, pet- and family-safe claims. This sits alongside a more conventional but accelerating **plant-based and "free-from" formulation trend** (free of sulphates, parabens, dyes, and ammonia), concentrated mainly in multi-surface wipes. A separate, less obvious trend worth flagging is the expected **decline in traditional floor cleaner volumes as automation (robotic vacuums and mops) displaces manual floor-cleaning products**—a rare case within this portfolio of a hardware trend reducing demand for a more traditional product category.

On **distribution**, hypermarkets (35%) and supermarkets (21%) remain the leading channels, but **e-commerce is the fastest-growing channel** at 28% share (\$2.4 billion), and direct-to-consumer brands are increasingly cited as the primary source of category innovation, particularly for sustainability-focused launches that may not yet have secured mainstream physical shelf space.

TOILET CARE

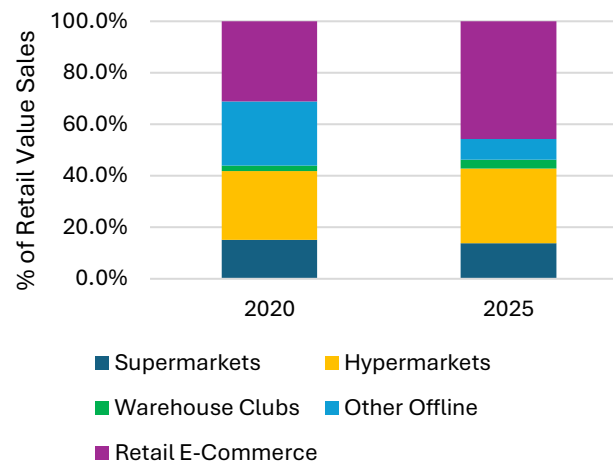
Toilet care is one of the smallest categories among cleaning products at **\$820 million** in 2025 (+4% year-over-year), with **toilet cleaning systems** the best-performing subcategory (+5% year-over-year to \$194 million), while **toilet liquids/foam** remains the largest at **\$436 million** (+4% year-over-year) on the strength of affordability and consumer familiarity. Growth is forecast to slow to a 2% CAGR through 2030 (\$899 million). **Bleach**, a related but distinct disinfection category, is essentially flat at **\$764 million** in 2025 (a marginal decline) and is forecast to grow just 0.2% compounded annually through 2030 (\$771 million)—one of only two categories in this portfolio expected to show almost no growth, the other being polishes.

U.S. Toilet Care Market Size 2025
(billions USD. % share)



Source: Euromonitor International Passport Market Database

U.S. Toilet Care Channel Distribution
2020–2025
(% Retail Value Sales)



Both categories share a similar tension between **value-seeking and premiumization**. In toilet care, rising price sensitivity has pushed share toward private label and direct-to-consumer alternatives, prompting leading brands to lean on emotionally resonant, wellness-oriented marketing to defend premium positioning rather than compete purely on price. In bleach, the dynamic is more structural: **Volume is declining as health-conscious consumers adopt more selective usage patterns** and gravitate toward milder alternatives for routine cleaning, reserving bleach for high-need disinfection only—yet value has stayed roughly flat because brands have successfully repositioned bleach as a multifunctional "clean, whiten, deodorize, and disinfect in one step" product rather than a single-purpose commodity. An interesting parallel trend across both categories is a shift toward **concentrated, lower-waste formats** (in-cistern devices and refill pouches for toilet care; concentrated bleach powders and tablets for bleach), driven as much by e-commerce shipping efficiency as by sustainability positioning.

On **channel distribution**, the two categories diverge sharply: Bleach remains overwhelmingly offline, with supermarkets and hypermarkets capturing **80% of value share** (consistent with its role as a routine grocery-basket item), while toilet care is the most e-commerce-skewed category in the entire portfolio, with online sales representing **46% of value share**—the single largest channel, ahead of any offline format—likely reflecting the appeal of lightweight, subscription-friendly formats like in-cistern refills.

POLISHES

Polishes is by far the **smallest and only meaningfully shrinking category** in the portfolio, with retail value falling 4% year-over-year in 2025 to just **\$135 million** (volumes fell even more sharply, down 7% year-over-year). **Furniture polish** is the largest subcategory at \$117 million and recorded the smallest decline, suggesting it is the most resilient niche within an otherwise contracting category. The core driver of decline is straightforward substitution: Consumers are increasingly satisfied with multi-purpose cleaners that combine cleaning, protection, and shine in one product, reducing demand for specialized polishing products, while the growing prevalence of synthetic materials that don't require polishing at all is structurally shrinking the addressable market.

On **distribution**, polishes is the most e-commerce-dependent category in the portfolio, with online sales capturing a dominant **52% value share**, reflecting how a shrinking, niche category increasingly relies on digital reach (specialized assortments, reviews, subscription models) to find its remaining customer base, rather than competing for shrinking shelf space in physical stores; offline channels (hypermarkets 24%, supermarkets 14%) still hold a meaningful **44% combined share**, largely through routine grocery-trip purchases.

SOAPS AND SANITIZERS

The focus categories within soaps and sanitation are **bar soap, liquid soap, and hand sanitizers**. Combined, these three categories totaled **\$5.1 billion** in 2025. **Bar soap** is the largest at \$2.2 billion (43.7% share, +3.2% year-over-year), narrowly ahead of **liquid soap** at \$2.1 billion (41.8% share, +1.2% year-over-year), with **hand sanitizers** the smallest at \$739 million (14.5% share)—but notably the **fastest-growing of the three at +7.1% year-over-year**, a standout figure suggesting renewed hygiene-consciousness is re-accelerating a subcategory that had cooled significantly since its pandemic-era peak.

The clearest storyline here is a **relative growth gap between bar soap and adjacent formats**: Bar soap's growth (3.2% year-over-year from 2024 - 2025) is respectable in isolation, but bar soap volumes are gradually migrating toward more experiential, multifunctional formats like body wash—meaning bar soap's unit growth is likely being propped up more by pricing than by volume gains, a dynamic to watch given its status as the largest of the three ACI-relevant subcategories. All three subcategories are forecast to continue growing at a similar, moderate pace through 2030 (roughly 3–3.4% CAGR for bar and liquid soap, 2.8% CAGR for hand sanitizers), suggesting a stable, low-drama outlook relative to some of the more volatile categories above.

On **distribution**, while granular channel data isn't broken out separately for soap and sanitizers, the broader Bath and Shower category (within which these sit) is led by **e-commerce at 34% share**, with hypermarkets and health and beauty specialists each holding 22%, and warehouse clubs gaining share (8%) on the strength of value-oriented multipack formats—patterns that plausibly extend to bar soap and hand sanitizer given their frequent bulk-purchase nature.

Trade and Competitiveness

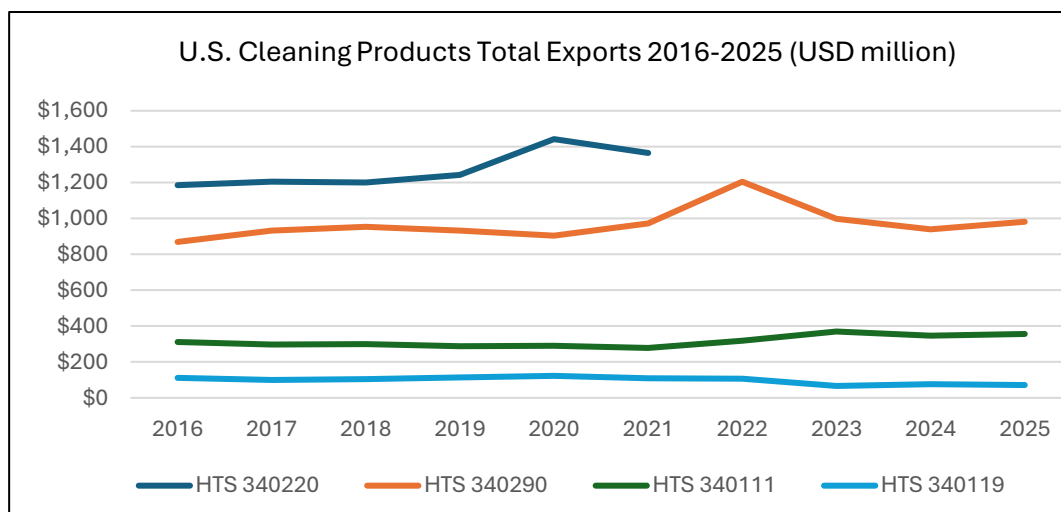
Canada and Mexico remain the dominant destinations for U.S. cleaning product exports, while import sourcing is far more diversified across Europe, Latin America, and Asia.

IMPORT AND EXPORT GROWTH

The U.S. cleaning products industry is a net exporter of finished cleaning products, exporting more products globally than it imports. Across the primary cleaning product categories analyzed, U.S. exports reached approximately \$1.41 billion in 2025, increasing 3.4% from the previous year, while imports declined 1.4%. The trade surplus is particularly pronounced for finished cleaning products, underscoring the international competitiveness of U.S. manufacturers and strong global demand for American-produced cleaning, hygiene, and sanitation products. This export strength supports domestic production, jobs, and investment throughout the supply chain.

U.S. cleaning product imports and exports experienced significant volatility during the COVID-19 pandemic but have since normalized. Following a surge in demand for soap and cleaning preparations in 2020-2021, import growth stabilized while export growth remained relatively modest over the 2016-2025 period. Across the four tracked HTS categories (340111, 340119, 340220, and 340290), this pattern suggests that domestic demand has recovered more quickly than export growth.

Trade data from the U.S. Census Bureau and UN Comtrade similarly indicate that U.S. soap exports have grown only gradually since 2021, even as the domestic market expanded at a 3.1% CAGR. At the same time, tariffs on certain Chinese-origin chemical inputs have increased costs for U.S. manufacturers, creating additional pressure on export competitiveness in several cleaning product categories.



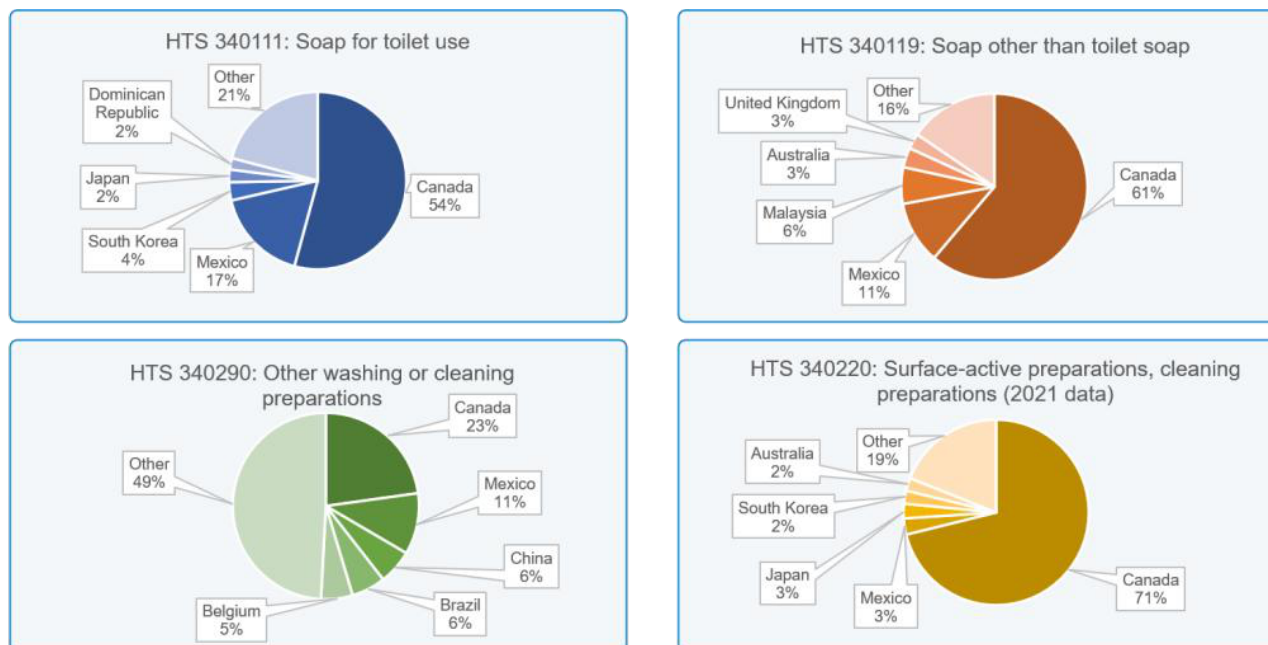
Source: ITC Trade Map June 2026

EXPORT DESTINATION MARKETS

In 2025, Canada and Mexico remained overwhelmingly the two largest destinations for U.S. cleaning product exports across nearly every category, a pattern reinforced by both the International Trade Centre (ITC) Trade Map data in this report and United Nations (UN) Comtrade and Observatory of Economic Complexity (OEC) figures, which show Canada alone receiving roughly \$599 million in U.S. soap exports and Mexico a further \$120 million in 2025. This concentration reflects the deep integration of North American supply chains under the United States-Mexico-Canada Agreement (USMCA), as well as the practical advantages of geographic proximity and harmonized regulatory frameworks for cross-border shipment of chemical and consumer products.

Beyond the North American core, export markets vary meaningfully by product category, revealing distinct regional demand patterns. Soap for toilet use (HTS 340111) sees more diversified secondary markets including Hong Kong, China, and South Korea, while surface-active preparations (HTS 340220) lean more heavily on Australia and the United Kingdom. Notably, "Other washing or cleaning preparations" (HTS 340290) exports to China grew to a meaningful \$59 million in 2025, a market worth monitoring closely given the current tariff friction between the two countries, which could just as easily disrupt this export channel as it has import flows in the opposite direction.

Value Share of U.S. Exports in 2025 by Trade Partner



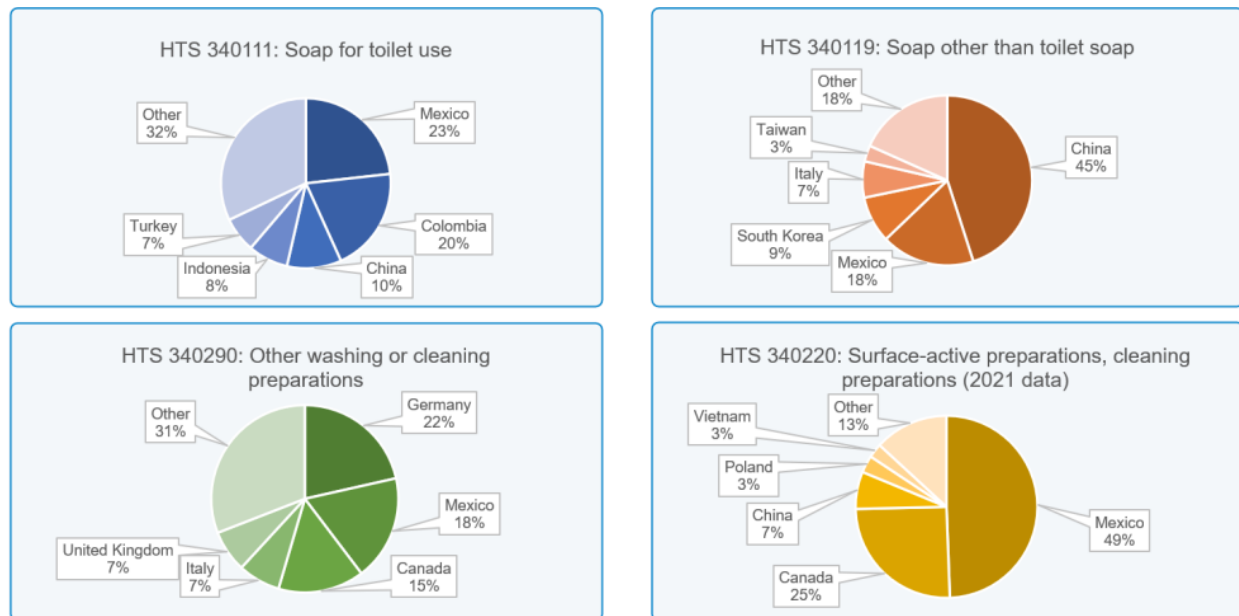
Source: ITC Trade Map June 2026

IMPORT SOURCE MARKETS

Compared to the concentrated nature of U.S. export markets, import sourcing for cleaning products is considerably more diversified, spanning a broader mix of European, Latin American, and Asian suppliers rather than relying predominantly on North American neighbors. Germany, Italy, and the United Kingdom feature prominently for soap imports (HTS 340111, HTS 340119), reflecting the strength of European specialty chemical and personal care manufacturing, while Mexico and Canada remain significant but not dominant suppliers—a marked contrast to their outsized role as export destinations.

China's role as an import source is particularly notable and warrants close attention given the evolving U.S.-China tariff landscape. China is the leading import source for surface-active preparations (HTS 340220, \$194.5 million in 2025) and a top-five supplier for soap other than toilet soap (HTS 340119, \$76.99 million), meaning a substantial share of the industry's import base is directly exposed to the stacked Section 301, IEEPA, and reciprocal tariffs—which U.S. International Trade Commission (USITC) and independent tariff trackers estimate at a blended effective rate of roughly 25–33% on Chinese-origin goods as of 2026. This tariff exposure creates a tangible cost pressure point for U.S. manufacturers reliant on Chinese-sourced surfactants and specialty chemical inputs, and is likely to continue incentivizing supply chain diversification toward alternative sourcing markets such as Vietnam, Indonesia, and Colombia, all of which already appear as meaningful (if smaller) suppliers across the four tracked HTS categories.

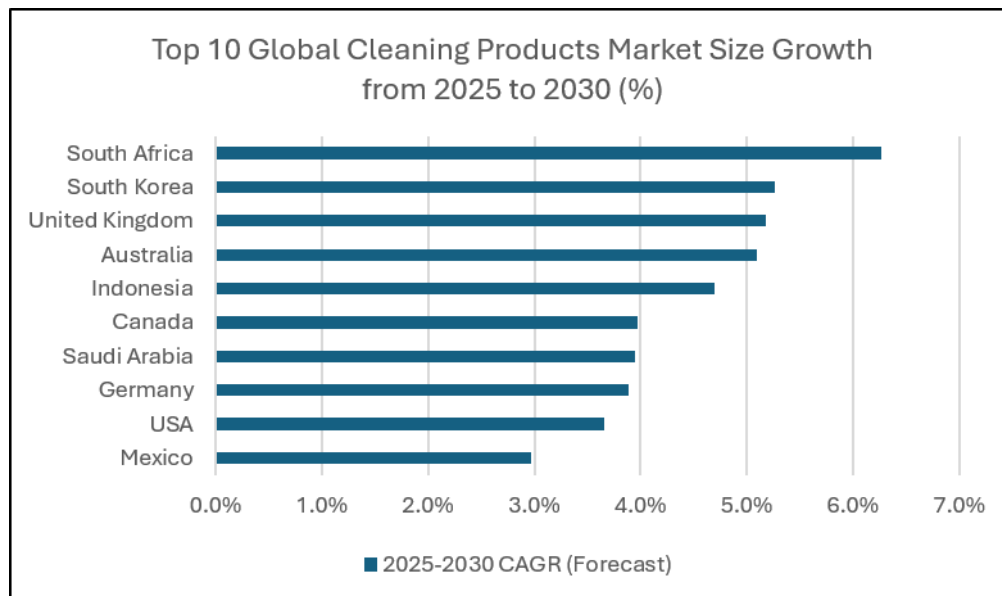
Value Share of U.S. Imports in 2025 by Trade Partner



Source: ITC Trade Map June 2026

GLOBAL DEMAND TRENDS

Beyond the U.S., the ACI-relevant cleaning products categories—laundry care, dishwashing, surface care, bleach, polishes, and toilet care—show a wide range of performance across the world's largest economies, reflecting varying stages of market maturity, consumer wealth, and structural dynamics. Emerging markets (Brazil, India, Mexico) are generally outgrowing developed markets, driven by rising disposable incomes, urbanization, and increasing appliance penetration (particularly automatic dishwashing), while developed markets (Japan, UK, China) show much more mixed performance, with several categories in outright decline due to market saturation, sustainability-driven consumer shifts away from harsh chemicals like bleach, and multifunctional products cannibalizing specialized ones like polishes. A common thread across nearly every market is the erosion of single-purpose products (bleach, polishes) in favor of multifunctional alternatives, alongside a near-universal premiumization trend built around fragrance, wellness, and mood-enhancement positioning—directly paralleling the U.S. narrative in this report.



Source: Euromonitor International Passport Database

Brazil: A story of two speeds—laundry care (the largest category) is contracting in value terms (-2%) as inflation pushes consumers toward cheaper regional brands, while dishwashing surges (+11%) on premiumization and skin-care positioning. Bleach remains unusually resilient (+10%) due to its dual-use as a dengue-prevention tool, a uniquely Brazilian dynamic tied to public health campaigns.

China: The most mature and slowest-growing market in this set, with four of six categories flat or declining. Growth is now driven almost entirely by innovation rather than category expansion—mood-boosting "sensorial" detergents (e.g., Lycocelle's 100%+ year-over-year growth) and e-commerce/livestream-driven brand discovery are the primary value creators in an otherwise saturated market.

Germany: The most balanced and steadily growing market, with all six categories posting positive 2025 growth. Sustainability is the dominant narrative (concentrated formats, refillable packaging), and private-label and direct-to-consumer (DTC) brands like Everdrop are winning share directly from multinationals on eco-credentials rather than price.

India: The fastest-growing market overall, with toilet care (+9%) and surface care (+8%) posting the strongest gains in this entire dataset, reflecting a market still building basic category penetration alongside rapid premiumization (Hindustan Unilever's "Surf Excel Matic Express," probiotic-powered cleaners). Note: bleach is not tracked as a distinct category in the Indian market data.

Japan: The only market showing broad-based decline—four of six categories fell in 2025, reflecting Japan's shrinking population and market saturation. Growth here comes entirely from premiumization and personalization (fragrance customization, multi-space scent formats) rather than volume, and B2B/professional-channel expansion is increasingly discussed as a strategic necessity.

Mexico: Consistently positive across all categories, with surface care (+6%) and dishwashing (+5%) leading. Growth is largely price-driven amid economic uncertainty, with private label and warehouse clubs (Costco's Kirkland, Sam's Club) gaining meaningful share as consumers trade down without sacrificing perceived quality.

United Kingdom: A bifurcated market—laundry care and dishwashing grow steadily (+2-3%) on health/wellness positioning, while bleach (-5%) and polishes (-4%) are in the steepest decline of any market studied, driven by sustainability concerns and the casualization of footwear (reducing shoe-polish demand) respectively.

Summary and Key Takeaways

Cleaning products do more than keep surfaces clean, they support American jobs, strengthen domestic supply chains, generate billions in economic value, and protect public health every

The findings of this report make clear that the U.S. cleaning products industry is far more than a supplier of everyday household and institutional products. It is a **critical engine of American economic activity**.

Cleaning products create value well beyond the products themselves. The industry's national footprint connects manufacturing to suppliers, transportation providers, workers, and communities in every state. For policymakers and other stakeholders, the findings show that supporting a competitive and innovative cleaning products sector also supports **domestic jobs, public revenues, resilient supply chains, and continued investment** in products that protect health and improve everyday life.

That economic impact is anchored in the essential role cleaning products play in daily life. From homes and schools to hospitals, restaurants, offices, and industrial facilities, these products help protect health, maintain safe and productive environments, and keep communities functioning. Their value extends beyond hygiene and sanitation. Every bottle of detergent, disinfectant, soap, surface cleaner, or institutional cleaning product reflects a larger American supply chain—one that connects **manufacturers, ingredient suppliers, transportation networks, retailers and workers in communities nationwide**.

The report also shows an industry that is adapting to a changing economy through **innovation and sustainability**. Manufacturers are developing products that perform in cold-water and quick-wash laundry cycles, dishwashing detergents that help reduce pre-rinsing and water use, multi-purpose cleaners that consolidate several tasks into one product, and concentrated or refillable formats that reduce packaging weight, shipping impacts and household waste.

Newer approaches—from microbial-based surface cleaners to pet-specific laundry formulations, lightweight pods, sheets, powders and tablets—illustrate how the industry continues to improve performance, convenience and resource efficiency while responding to changing consumer expectations and regulatory pressures.

The cleaning products industry is essential for modern life. It **safeguards public health, enables commerce, supports jobs, strengthens supply chains and contributes billions in economic value and tax revenue**. Just as important, it continues to innovate—delivering products that clean effectively while helping households, businesses and institutions use water, energy, packaging and time more efficiently.

As policymakers, business leaders and consumers consider what it takes to build a healthier, more resilient and more competitive America, this report underscores a simple but powerful conclusion: Cleaning matters—not only because it protects people, but because it helps power the American economy.

APPENDIX A: STATE LEVEL EMPLOYMENT AND ECONOMIC OUTPUT

State-Level Economic Output and Employment by Impact Type

State	Direct Output (\$)	Direct Employment (Jobs)	Total Output (\$)	Total Employment (Jobs)
Alabama	\$915,223,569	700	\$1,123,268,194	1,630
Alaska	\$4,941,701	5	\$6,705,674	12
Arizona	\$426,868,750	392	\$466,925,983	533
Arkansas	\$605,561,313	477	\$765,420,908	1,157
California	\$6,513,833,849	4,019	\$6,834,212,500	5,022
Colorado	\$355,322,947	352	\$422,073,833	595
Connecticut	\$535,166,843	345	\$594,339,734	568
Delaware	\$652,162,459	264	\$800,647,350	845
Florida	\$1,633,556,241	1,373	\$1,858,988,620	2,383
Georgia	\$3,306,027,352	3,005	\$3,779,281,935	4,929
Hawaii	\$88,646,044	68	\$110,542,791	161
Idaho	\$40,227,740	31	\$53,395,085	83
Illinois	\$5,258,117,718	3,934	\$5,592,601,434	5,045
Indiana	\$1,773,225,637	1,334	\$2,145,045,775	2,878
Iowa	\$1,018,054,474	615	\$1,320,425,169	1,815
Kansas	\$877,406,468	667	\$1,135,969,603	1,667
Kentucky	\$1,445,455,650	1,017	\$1,795,843,157	2,545
Louisiana	\$3,441,829,202	2,435	\$4,140,339,183	4,806
Maine	\$127,689,298	121	\$178,528,347	334
Maryland	\$563,263,996	430	\$652,913,211	776
Massachusetts	\$1,169,102,648	685	\$1,263,536,735	1,068
Michigan	\$3,192,281,655	2,515	\$3,788,090,048	4,951
Minnesota	\$594,830,875	498	\$758,710,253	1,146
Mississippi	\$331,746,239	340	\$436,677,846	818
Missouri	\$4,400,938,343	3,760	\$5,425,882,870	7,646
Montana	\$88,632,239	83	\$127,897,491	227
Nebraska	\$856,107,053	518	\$1,110,947,841	1,527
Nevada	\$140,334,462	131	\$170,669,601	244
New Hampshire	\$27,453,573	28	\$33,593,582	54
New Jersey	\$3,932,382,387	2,620	\$4,445,200,214	4,424
New Mexico	\$133,921,767	112	\$159,998,161	210
New York	\$2,077,773,722	1,416	\$2,342,511,119	2,454
North Carolina	\$4,346,164,273	3,142	\$4,846,745,844	5,133
North Dakota	\$90,514,338	52	\$136,546,918	212
Ohio	\$13,005,392,388	7,310	\$15,055,696,239	15,403
Oklahoma	\$331,325,979	309	\$422,499,592	639
Oregon	\$307,360,856	279	\$374,621,973	562

Pennsylvania	\$3,430,583,158	2,702	\$4,148,251,897	5,754
Rhode Island	\$256,681,184	253	\$319,322,529	499
South Carolina	\$3,269,051,134	2,637	\$3,973,692,301	5,635
South Dakota	\$262,509,209	116	\$398,449,729	698
Tennessee	\$2,204,948,282	1,863	\$2,853,300,816	4,469
Texas	\$6,437,217,226	4,332	\$7,242,102,696	7,106
Utah	\$694,215,175	643	\$860,089,282	1,176
Vermont	\$304,283,599	316	\$435,825,482	866
Virginia	\$832,904,989	624	\$1,034,663,614	1,468
Washington	\$638,765,724	582	\$795,921,227	1,138
West Virginia	\$2,157,976,893	1,656	\$2,795,916,225	4,625
Wisconsin	\$3,055,668,200	3,332	\$3,584,159,554	5,664
Wyoming	\$300,719,761	244	\$431,553,265	697
U.S. Total	\$88,454,368,581	64,681	\$103,550,543,429	124,298

APPENDIX B: REFERENCES

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APPENDIX C: ACI SHARES OF NAICS INDUSTRY CODES AND RELEVANT SUBSECTORS

Industry Code and Description	ACI Industry Share
325180 Other basic inorganic chemical manufacturing	26.4%
Chlorine, compressed or liquefied	
Sulfuric acid	
Inorganic acids, excluding nitric, sulfuric, and phosphoric	
Sodium hydroxide (caustic soda)	
Other alkalies	
Potassium and sodium compounds, excluding bleaches, alkalies, and alum, nsk	
325199 All other basic organic chemical manufacturing	15.6%
Fatty acid esters, excluding biodiesel fuels	
All other fatty acids (produced for sale as such)	
Fatty acids, nsk	
Natural organic chemicals, including salts, alcohols, and esters, excluding plasticizers and surface active agents	
Synthetic organic alcohols, unmixed	
Synthetic organic chemicals for use as flavor and perfume materials, mixed and unmixed	
325611 Soap and other detergent manufacturing	91.4%
Commercial, industrial, and institutional dry, liquid, and aerosol hard surface cleaners	
Commercial, industrial, and institutional laundry detergents	
Commercial, industrial, and institutional dry and liquid dishwashing detergents	
Commercial, industrial, and institutional metal cleaners	
Commercial, industrial, and institutional soaps, excluding specialty cleaners	
Soaps and detergents, commercial, industrial, and institutional, nsk	
Household alkaline dishwashing detergents	
Household dry laundry detergents, heavy-duty, phosphate-free, and household liquid laundry detergents	
Household detergents, nsk	
Soaps, excluding specialty cleaners, household	
Glycerin, natural	
Soap and other detergent manufacturing, nsk, total	
325612 Polish and other sanitation good manufacturing	69.0%
Household bleaches (chlorine and nonchlorine)	
Disinfectants, nonagricultural, industrial and institutional	
Glass window cleaning preparations, excluding automotive windshield washer fluid, household	
Glass window cleaning preparations, excluding automotive windshield washer fluid, industrial and institutional	
Oven cleaners	
Toilet bowl cleaners, household	
Toilet bowl cleaners, industrial and institutional	
Bathroom, tub, and tile cleaners	
Disinfectants, nonagricultural, household	
Rug and upholstery cleaners, consumer-type preparations	
Rug and upholstery cleaners, industrial- and institutional-type preparations	
Household ammonia	
Other specialty detergents, including sweeping compounds, waterless hand cleaners, wallpaper cleaners, etc.	
Laundry fabric softeners and rinses, liquid and dry	
Specialty cleaning and sanitation products, nsk	
325613 Surface active agent manufacturing	100.0%
Surfactants, finishing agents, and assistants	

APPENDIX D: METHODOLOGY

Research Approach

Euromonitor International conducted this study on behalf of the American Cleaning Institute (ACI) to quantify the economic contribution of the U.S. cleaning products industry. The analysis measures direct, indirect, and induced economic activity supported by the industry and provides estimates at the national, state, and congressional district levels. It combines industry and government data with economic contribution modeling to provide a transparent, consistent basis for policymaker engagement, stakeholder communications, and strategic planning.

The study focuses primarily on the manufacturing and upstream supply chain activity associated with cleaning products and related ingredients within ACI's defined scope and includes a supplemental downstream view. Because cleaning products account for only part of several broader federal industry classifications, customized industry definition and allocation factors were applied before modeling. This isolates cleaning-related activity from unrelated products reported within the same industries.

Industry Definition and Scope

The analytical framework identifies five industries that represent the core of the U.S. cleaning products manufacturing base. These are defined using North American Industry Classification System (NAICS) codes and mapped to their corresponding IMPLAN industries. ACI-provided industry-share assumptions were then used to estimate the portion of each broad industry attributable to cleaning-related products, since each NAICS industry contains products beyond ACI's scope.

The industry-share percentages were reviewed and confirmed before use. This review examined the detailed NAICS-to-IMPLAN bridge and the product classifications within each NAICS industry to verify that the shares remained directionally reasonable. These detailed index entries are classification examples rather than economic weights, so they were used only as a reasonableness check and not to recalculate the shares.

The final contribution percentages (industry shares) applied to each in-scope industry were as follows:

- IMPLAN Industry 154 - Other Basic Inorganic Chemical Manufacturing (NAICS 325180): 26.4%
- IMPLAN Industry 155 - Other Basic Organic Chemical Manufacturing (NAICS 325199): 10.033%
- IMPLAN Industry 169 - Soap and Other Detergent Manufacturing (NAICS 325611): 91.4%
- IMPLAN Industry 170 - Polish and Other Sanitation Good Manufacturing (NAICS 325612): 69.0%
- IMPLAN Industry 171 - Surface Active Agent Manufacturing (NAICS 325613): 100%

The 10.033% share for IMPLAN Industry 155 required an additional step because NAICS 325199 is not a standalone IMPLAN industry; it is grouped with other NAICS industries outside ACI's scope. To isolate the in-scope portion, NAICS 325199 was first separated from the broader IMPLAN industry using its share of 2022 Economic Census receipts (approximately 64.3%), and the legacy 15.6% cleaning products share was then applied to that isolated portion (64.3% multiplied by 15.6% equals 10.033%). Receipts were used because the contribution model is output-driven, and receipts are the closest available Census measure of industry output. The resulting 10.033% factor was entered directly as the contribution percentage for IMPLAN Industry 155 within the Industry

Contribution Analysis, using the IMPLAN model to estimate the corresponding direct, indirect, and induced effects for the in-scope portion of the industry.

Upstream Versus Downstream Activity

Consistent with standard economic contribution studies, this analysis measures and highlights the industry's upstream economic activity as the primary economic impact. Upstream activity refers to the flow of goods and services needed to support the industry, including production within the in-scope industries, the supply chain purchases required to produce cleaning products, and the household spending supported by the wages of workers throughout that supply chain. In this report, the industry's headline economic impact corresponds to the direct, indirect, and induced upstream results.

Upstream is treated as the main measure of economic impact for a specific analytical reason. An economic contribution study is intended to capture the activity generated to support the industry's production. Downstream activity represents a distinct part of the economic value chain and is therefore treated separately from the industry's core upstream economic contribution. Any downstream results will be clearly identified as a supplemental view and reported separately from the upstream direct, indirect, and induced results to minimize the risk of overlap or double counting.

Input-Output Modeling Framework

Economic contributions were estimated using IMPLAN's input-output (IO) framework. An IO model represents the flow of goods and services among industries, households, and governments. Its regional accounts describe how each industry purchases intermediate inputs, pays workers and proprietors, generates value added, and sells output. These inter-industry relationships allow activity in the cleaning products industry to be traced through upstream suppliers and the household spending supported by worker income.

The framework reflects the principle that production in one industry generates demand in others. Cleaning-product manufacturers purchase chemicals, packaging, transportation, utilities, professional services, and other inputs. Their suppliers purchase additional inputs, while employees supported across the production chain spend part of their income on household goods and services. IMPLAN translates these relationships into direct, indirect, and induced effects using geographically specific economic data.

Industry Contribution Analysis

The study uses IMPLAN Industry Contribution Analysis (ICA), which is designed to estimate the ongoing contribution of an existing industry rather than the effect of a new project or change in final demand. ICA constrains the model so that the direct contribution does not exceed the defined share of the existing industry and accounts for purchases among the included industries to limit double counting. The five in-scope industry events were treated as components of one cleaning-products contribution analysis. The same national contribution percentages were applied across congressional districts because district-specific product-level shares are unavailable.

Economic Effects Measured

Direct effects: Economic activity within the defined cleaning products industry, including production, employment, labor income, value added, and tax contributions.

Indirect effects: supply chain activity supported when in-scope manufacturers purchase intermediate goods and services from upstream industries.

Induced effects: Activity supported when workers earning income through direct and indirect activity spend part of that income on household goods and services.

Total contribution: The combined direct, indirect, and induced effects. These estimates describe activity supported by the industry and should not be interpreted as the economy-wide loss that would necessarily occur if the industry disappeared.

The direct, indirect, and induced effects above are reported on an upstream basis, which is the study's primary measure of economic impact. Where downstream results are presented, they are clearly labeled as a supplemental component and are not added to the upstream totals.

Economic measures

- Output: The gross value of production supported across direct, indirect, and induced activity.
- Employment: Jobs supported in the model, including full-time and part-time positions and self-employment where represented in the underlying accounts.
- Labor income: Employee compensation plus proprietor income supported by industry activity.
- Value added: The contribution to gross domestic product, consisting of labor income, taxes on production and imports, and other property income. Value added is a component of output and should not be added to output.
- Tax revenues: Estimated federal, state, and local tax revenues associated with modeled economic activity.

Geographic Modeling

National headline results were generated using a dedicated U.S. model. State and congressional district results were produced using regional models that reflect each area's industry composition, supplier availability, commuting patterns, household spending, and regional purchase relationships. A purchase that cannot be satisfied within the modeled region is treated as leakage, so smaller regional models generally retain less indirect and induced activity than a national model.

For this reason, regional results are not expected to sum exactly to the dedicated U.S. model. Summing stand-alone congressional district models can omit cross-district supply chain and household-spending effects that remain within the United States. District estimates should therefore be interpreted as the contribution retained within each modeled district under IMPLAN's regional structure, while the U.S. model provides the appropriate national headline totals.

Model Assumptions and Limitations

Input-output analysis is a static accounting framework. It assumes that the production relationships represented in the underlying data are a reasonable approximation of current relationships and that industries use inputs in fixed proportions within the modeled scenario. The model does not independently forecast changes in technology, prices, consumer behavior, capacity constraints, or long-run substitution among inputs. Results are estimates based on the industry scope, allocation shares, regional accounts, and model assumptions available for the analysis.

Validation and Quality Assurance

Euromonitor conducted multiple checks before finalizing the estimates. The team reviewed the NAICS-to-IMPLAN bridge and detailed product classifications; confirmed the reasonableness of the ACI allocation shares; isolated the in-scope portion of IMPLAN Industry 155 using official Economic Census receipts; and applied contribution shares consistently across direct, indirect, and induced effects. Tax totals were recalculated and checked so that total taxes equal federal plus state and local taxes, subject only to immaterial rounding.

Passport Data Methodology

Passport is Euromonitor International's proprietary collection of market data and analysis. For this study, Passport provides the consumer-market context for the U.S. cleaning products industry, including historical and forecast market size, consumer demand, retail sales, distribution channels, company and brand shares where available, and related economic and demographic indicators. Passport data are researched on a recurring basis by local analysts using a combination of primary and secondary sources.

Passport estimates are developed by triangulating multiple inputs rather than relying on a single source. Internal methodology materials identify secondary sources such as government statistics, trade associations, trade press, industry reports, company reports, and other public databases. Primary inputs may include trade interviews, surveys, store visits or store audits, and other observed market evidence. Where direct data are limited, analysts may also compare similar countries or categories and use macroeconomic, demographic, and inflation indicators to support estimation.

Market sizing uses both top-down and bottom-up analysis. Top-down analysis establishes a total-market ceiling using the broader value chain, macroeconomic relationships, and supply-and-demand indicators. Bottom-up analysis builds estimates from company, brand, category, retailer, channel, volume-consumption, and unit-price evidence where those inputs are available. The estimates are then triangulated across sources and methods to arrive at a consistent market view. Euromonitor methodology materials describe data-processing controls that include review of data quality, missing values, outliers, duplication, transformations, weighting or indexing, and simplification where appropriate.

Market estimates and findings are cross-checked through local and global review, including validation through industry-expert interviews and comparisons between top-down and bottom-up results. This process is intended to make estimates comparable across countries and categories while preserving market-specific evidence and analyst judgment.

Forecasts use Passport and secondary-source history as a baseline. Euromonitor internal materials state that forecasts may incorporate macroeconomic and sociodemographic indicators, including GDP, population, disposable income, demographic trends, and inflation, together with category conditions, company performance, channel developments, and qualitative expectations such as consumer preferences. Forecasts should therefore be interpreted as estimates based on the information and assumptions available at the time of research, rather than guaranteed outcomes.

For the ACI report, Passport market-size and forecast data describe in-market consumer sales and demand for the covered cleaning-product categories. These figures are analytically separate from the IMPLAN economic contribution estimates and should not be added to IMPLAN output, value added, labor income, or tax results. Passport is used to describe market size, historical

performance, category composition, distribution, and outlook for consumer cleaning products, while IMPLAN measures the direct, indirect, and induced economic contribution of the broader ACI-defined manufacturing industry. The Passport sales series covers consumer cleaning-product categories, whereas the economic contribution analysis includes the ACI-defined manufacturing scope encompassing both consumer and institutional or industrial activity, so the two measures are not directly comparable.

APPENDIX E: GLOSSARY OF TERMS

ACI Product Scope The set of products and NAICS-defined industries that fall within the American Cleaning Institute's membership and are included in this study's economic modeling (see Appendix A).

B2B (Business-to-Business) Sales or transactions between businesses (e.g., a manufacturer selling cleaning chemicals to a distributor or institutional buyer), as opposed to sales directly to individual consumers.

CAGR (Compound Annual Growth Rate) The average annual growth rate of a value over a specified period, assuming steady compounding — used throughout the report to express historical and forecast growth (e.g., "3.7% CAGR through 2030").

Direct Effects/Output The initial, immediate economic activity generated by a company or industry's own production — e.g., revenue, jobs, and wages at cleaning product manufacturers themselves.

Indirect Effects/Output The "ripple effect" of economic activity generated when an industry purchases goods and services from its suppliers (e.g., a detergent manufacturer buying packaging or chemical inputs).

Induced Effects/Output Economic activity generated when employees — at both the direct industry and its suppliers — spend their wages on everyday goods and services (groceries, housing, etc.).

IMPLAN An economic modeling software and dataset used to estimate the direct, indirect, and induced effects of an industry using an input-output (I-O) framework.

Industry Contribution Analysis (ICA) A specific IMPLAN modeling approach designed to estimate the ongoing economic contribution of an *existing* industry (as opposed to modeling the impact of a new project or policy change).

Input-Output (I-O) Model An economic framework that maps how industries buy from and sell to one another, households, and government, allowing analysts to trace how activity in one industry ripples through the broader economy.

Labor Income Employee compensation (wages, salaries, benefits) plus proprietor income generated by an industry's activity.

Multiplier The ratio of total economic effect (direct + indirect + induced) to direct effect alone; a multiplier of 1.92x for employment means total jobs are 1.92 times the number of direct jobs.

NAICS (North American Industry Classification System) The standard system used by U.S., Canadian, and Mexican statistical agencies to classify business establishments by industry.

Output The total gross value of goods and services produced by an industry, encompassing direct, indirect, and induced activity.

Passport Euromonitor International's proprietary market research database, used in this report to source consumer retail sales data, market sizing, and category-level trends.

RSP (Retail Selling Price) The final price paid by consumers at retail — the basis for the consumer sales figures reported in the Industry Overview section.

Tax Contribution Estimated federal, state, and local tax revenue generated by an industry's direct, indirect, and induced economic activity.

Total Contribution/Impact The sum of direct, indirect, and induced effects; represents the overall economic footprint attributable to an industry's presence, not a measure of what would be "lost" if the industry ceased to exist.

Upstream Activity Economic activity that supports an industry's *production* — including the industry's own output, its supply chain purchases, and the spending of wages earned throughout that chain. This is the primary basis for this report's headline economic impact figures.

Downstream Activity Economic activity that occurs *after* a product leaves the manufacturing industry — such as wholesale and retail distribution. Presented in this report (where included) as a supplemental, separately reported measure, not part of the headline upstream totals.

Value Added An industry's contribution to Gross Domestic Product (GDP) — the sum of labor income, taxes on production/imports, and gross operating surplus (profit). Value added is a *component* of output and should not be added to it.

Trade-Specific Terms

HTS Code (Harmonized Tariff Schedule) The classification system used by U.S. Customs to categorize imported and exported goods for tariff and trade-statistics purposes (e.g., HTS 340111 for toilet soap).

IEEPA (International Emergency Economic Powers Act) U.S. federal law used as legal authority for certain tariff actions, including recent measures affecting Chinese-origin goods.

Section 301 A provision of the Trade Act of 1974 allowing the U.S. to impose tariffs in response to unfair foreign trade practices; the basis for a significant share of current U.S. tariffs on Chinese imports.

USMCA (United States-Mexico-Canada Agreement) The trade agreement governing tariff-free (or preferential) trade among the three North American countries, underpinning the concentration of U.S. cleaning product exports to Canada and Mexico.