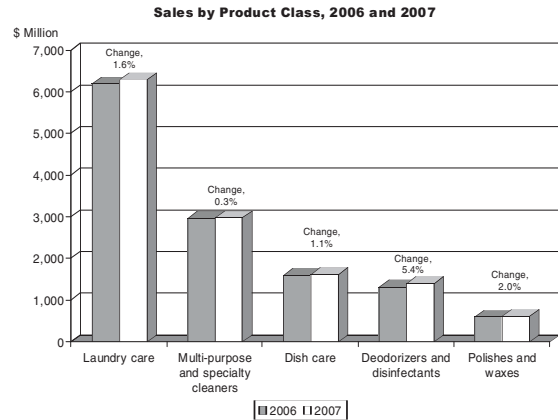


# Household Cleaning Products USA

## 2007 Fact Sheet

### The Market

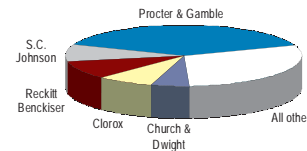
After experiencing its largest growth in five years during 2006, the household cleaning products industry registers more modest gains in 2007. Industry performance reflects higher pricing, growing demand for eco-friendly cleaners, consumer demand for time- and effort-saving products, more sophisticated fragrance offerings, and increased levels of promotions. Laundry care is the largest product class and represents 48.8% of sales.



### Companies

The top 10 companies have combined sales of approximately \$11.1 billion, representing 86% of total household cleaning product sales in 2007. The top four companies maintain the same ranking in 2007 as the previous year, while Church & Dwight moves up one position to the fifth spot vacated by Unilever, which drops down to the seventh position.

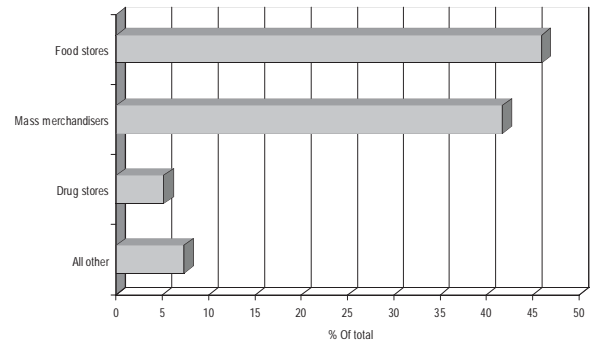
**Market Share of Top Five Companies, 2007**



### Retail Channels

Food stores continue to account for the majority of sales of household cleaning products as about 46% of selling is accomplished through this channel in 2007. Still, mass merchandisers continue to grow in popularity due to generally lower price levels, an increasing availability of a wider range of product and brand choices, and an increasing geographical reach and number of stores.

**Sales by Retail Outlet, 2007**



### Future Outlook

Sales in the household cleaning products industry will increase at a higher rate than the growth realized over the last five years with higher-cost, higher-margin products driving growth, totaling \$14,085 million by 2012. Categories that will likely grow the fastest over the forecast period include air fresheners, bathroom cleaners and mildew removers, and laundry detergents.

**Forecast Sales of the U.S. Household Cleaning Products Industry**

