



2023 Consumer Products Survey Summary Report



October 5, 2026

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INTRODUCTION

The California Air Resources Board (CARB) Consumer Products program has completed review and analysis of data submitted by stakeholders as part of our 2023 Consumer & Commercial Products Survey. CARB received data from over 600 product manufacturers and formulators who provided product sales and chemical formulation information for over 46,200 products. In addition, multiple companies participated in subsequent discussions with CARB staff to provide clarity and context for their data and the consumer product sector. These data and discussions have allowed CARB to develop a detailed and nuanced summary of consumer product sales, emissions, volatile organic compound content, chemical speciation, reactivity, and other information for the 37 categories that were surveyed.¹

The Final 2023 Consumer & Commercial Products Survey Data Release includes seven parts:

- This summary report document, which contains the results of company outreach, market research, and comparative data analysis between past and current Consumer Products Surveys, which were used to provide context for and explain trends in sales and emissions for multiple specific consumer products categories in the Final Survey Data Summary.
- The Final Survey Data Summary spreadsheet, which contains detailed breakdowns of each category surveyed, including sales, volatile organic compound content, and photochemical reactivity.
- The Total Organic Compound (TOG) Speciation report, which provides a breakdown of specific TOG species by consumer products sector.
- Four additional data characterization summary reports
 - The Survey Chemical List and Assignments report, which includes how each reported chemical was speciated for analysis.
 - A report detailing the number of products per company responding to the 2023 Survey.
 - A list of TOG ingredients, reported by survey category.
 - A list of reported hydrocarbon solvents and how they were characterized.

¹To protect confidentiality of responding companies, information has been withheld in cases when too few products were reported within a particular category.

These data will be used to inform updates to California's consumer products emissions inventory and provide a strong scientific foundation for upcoming collaborative, transparent, and effective rulemaking to achieve additional emission reductions from consumer products.

2023 CONSUMER & COMMERCIAL PRODUCTS SURVEY DATA SUMMARY

On April 30, 2026, CARB released draft versions of our survey data reports² and collected feedback and comments from survey participants and industry stakeholders. CARB staff also solicited comments from individual survey participants to help characterize potential gaps in CARB's draft data summary and to help contextualize issues specific to their reported data. The findings from these stakeholder engagements, along with other CARB findings, are detailed in this report.

Market Disruptions Due to the COVID Pandemic Persisted Into 2023 for Several Categories

Comments received in response to the draft data release, and follow-up engagement with individual industry stakeholders indicate that changes in consumer purchasing behavior and supply chain disruptions due to the COVID pandemic continued to impact the consumer products market in 2023. The most notable impacts were in household and personal disinfectant product categories such as "Anti-microbial Dry Hand Wash (Hand Sanitizer)", "Dual Purpose Air Freshener/Disinfectant (aerosol)", and "Disinfectant (aerosol)."

Survey-to-Survey Variations and Contributing Factors

In some cases, variation was noted between the 2013-2015 Survey and 2023 draft survey data. After release of the 2023 draft data, CARB conducted follow-up outreach to survey respondents to explore these variations. The specific instances and causes of these variations are detailed below. Other differences between the surveys are best attributable to natural changes in marketplace and consumer behavior, and disruptions due to the COVID pandemic.

² Draft report documents from the April 30, 2026 release are available here: <https://ww2.arb.ca.gov/our-work/programs/consumer-products-program/product-reporting/2023-consumer-and-commercial-products>

General Purpose Degreaser (nonaerosol) Reporting Companies

The number of companies reporting nonaerosol General Purpose Degreaser products was lower in 2023 when compared to the 2013-2015 Survey,³ however, most sales in this category are attributed to large volume manufacturers which represent approximately 90 percent of the reported sales mass. CARB staff believe that changes in the number of reporting companies do not directly correspond to large changes in market activity. Further evaluation may result in market adjustments to reported emissions.

Spot Remover (nonaerosol) Claim Diffusion

Products reported in this category often included multiple other cleaning claims or usage instructions that could have placed them in non-surveyed laundry product categories. In addition, some companies reported increased COVID pandemic-related sales. CARB staff believe these two factors led to the increase in reported sales for the Spot Remover category when compared to past surveys.

Footwear or Leather Care Products: Secular Sales Decline

These categories show an overall decrease in sales when compared to previous surveys. Discussions with major market participants indicate that the decline in sales in this product category is driven primarily by changes in consumer preferences.

Conditioner Without Styling Claims: Survey Underreporting

Compared to the previous 2013-2015 Survey, there was a significant decline in reported sales for this category. The review of CARB's survey process, along with discussions with industry participants, suggests that the decline is driven by multiple factors. Companies appear to have classified their products under other, non-surveyed categories, and the targeted scope of the survey further contributed to the decrease. CARB also found that market trends and consumer preferences for

³ Results from previous CARB Consumer Product surveys are available here: <https://ww2.arb.ca.gov/our-work/programs/consumer-products-program/consumer-commercial-products-surveys>

conditioners with and without styling claims cannot be fully captured without including other styling product categories.

Miscellaneous Solvent and Thinning Products Subsector

Collectively, reported sales in this subsector align well with the 2013-2015 Survey. However, significant sales differences were noted for specific categories. These reporting differences appear to stem from the similarity and interchangeability of products within these categories, and subsector growth remains closely aligned with historical trends.