

TRADE FOCUSED PRODUCT REPORTS

Cleaning products

HS Code 3402



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APRIL 2024



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Glossary of terms and abbreviations

Export concentration

This index measures, for each product, the degree of export market concentration by country of origin. It tells us if a large share of commodity exports is accounted for by a few countries or, on the contrary, if exports are well distributed among many countries. The index ranges from 0 to 1, with higher values indicating more market concentration.

Gulf Cooperation Council (GCC) Standardization Organization (GSO)

Gulf Cooperation Council (GCC) member countries created the GSO as a mechanism for developing food and non-food standards. GSO food-related technical regulations and standards serve as the main point of reference for food imports into the Gulf region. Codex Alimentarius, the International Organization for Standardization (ISO), the European Food Safety Agency (EFSA) and the U.S. Food and Drug Administration (FDA) serve as reference points for GSO standards and technical regulations.

HS (Harmonized System) codes

A standardised number classification system for traded goods. It is used by customs officials around the world to identify products for the purpose of applying duties and taxes, as well as for statistical purposes.

Market concentration

Market concentration determines the extent to which countries or firms hold market share. It is frequently used as a measure for the level of competitiveness. Measured on different scales and ranges, the general rule is the higher the score, the greater the level of competitiveness.

In respect to the Shannon Entropy scoring used by the Observatory of Economic Complexity and referenced in the report, the closer the number is to 1, the greater the concentration of just a small number of players and the lower the competitiveness. A score of 5.02 for cleaning products, HS code 3402 – as stated in this study – indicates a broad marketplace representing a large number of competitors, and a majority of exports from 32 competing countries.

MFN (Most Favoured Nation) tariff

Tariffs imposed by WTO (World Trade Organization) members on importing goods from other WTO members in the lack of a preferential trade agreement.

Nes (Not elsewhere specified)

Not elsewhere specified (or indicated for NESOI) is stated for an item that is not mentioned elsewhere in a classification system.

NTM (non-tariff measure)

Import and export regulations that reflect conditions of market access other than tariffs. They include numerous regulatory requirements such as health restrictions for food quality, packaging guidelines, minimum safety standards for produced goods, etc.

PCI (Product Complexity Index)

PCI ranks the breadth and sophistication of know-how required in manufacture. High PCI scores indicate that a product requires significant expertise and particular resources for its production, such as advanced machinery. Goods with a high PCI value, representing a complexity that only a few countries can undertake, include electronics and chemicals. Conversely, a low score suggests that many countries can produce the item, like basic agricultural goods or petroleum. The score's level depends on various factors.

Preferential tariffs

A tariff applied to a product that is less than the MFN levy due to the existence of a preferential trade agreement. This could be a bilateral advantageous trading arrangement or a single system of favours, such as the United States GSP (generalised system of preferences).



Product descriptions by HS 6-digit code

HS 340211 – Anionic organic surface-active agents, whether or not put up for retail sale

Product examples include.

Anionic surfactants: sodium lauryl sulfate and sodium laureth sulfate, found in shampoos, body washes, and laundry detergents.

Dishwashing liquids: help in breaking down grease and food residues, making them water-soluble for easy cleaning.

Laundry detergents: liquid and powder forms.

Cleaning agents for household use: multipurpose cleaners, floor cleaners, and bathroom cleaners.

Car wash detergents.

Industrial cleaning agents: stronger formulations used in industrial and commercial settings.

Personal care products: toothpaste, facial cleansers, and body washes.

Textile and leather processing chemicals.



HS 340212 – Cationic organic surface-active agents, whether or not put up for retail sale

Product examples include.

Cationic surfactants: positively charged surfactants effective in softening fabrics and often found in fabric softeners and hair conditioners.

Antiseptic and disinfectant products: used for the ability of cationic surfactants to disrupt microbial cell membranes.

Emulsifiers in cosmetics: used in creating stable emulsions.

Industrial cleaning solutions: used for the ability to remove dirt and oil from various surfaces.

Water treatment chemicals: used to coagulate and remove impurities from water.

Agricultural chemicals: e.g., pesticides and herbicides where cationic surfactants are used to improve distribution and adherence of active ingredients on plant surfaces.

HS 340213 – Non-ionic organic surface-active agents, whether or not put up for retail sale

Product examples include.

Non-ionic surfactants for industrial use: used in various industrial cleaning products.

Household cleaners: all-purpose cleaners, window cleaners, and other household cleaning products.



Laundry detergents and dishwashing liquids.

Personal care products: shampoos, body washes, and facial cleansers, particularly for sensitive skin.

Cosmetic products: lotions, creams, and makeup, for their emulsifying properties and mildness.

Agricultural products: non-ionic surfactants are used as adjuvants in pesticides and herbicides to improve the distribution and effectiveness of active ingredients.

Food industry: emulsifiers and stabilisers.

HS 340219 – Organic surface-active agents, whether or not put up for retail sale

Product examples include.

Amphoteric surfactants: anionic or cationic surfactants used in personal care products such as shampoos and body washes.

Specialised industrial surfactants: paints, coatings, inks, dyes and other industrial formulations.



Emulsifying agents in food: used to maintain consistency and stability in products e.g., salad dressings, ice creams, and baked goods.

Surfactants in cosmetics and skincare products: employed for emulsifying, foaming, or solubilising properties, in products like makeup removers, moisturizers, and sunscreens.

Cleaning agents for electronic components: for the removal of contaminants without damaging sensitive parts.

Oilfield chemicals: used in applications like drilling, extraction, and oil recovery, to reduce surface tension and improve the efficiency of oil extraction and processing.

HS 340220 – Surface-active preparations, washing preparations, auxiliary washing preparations and cleaning

Product examples include.

Household cleaning agents: multi-purpose cleaners, kitchen cleaners, bathroom cleaners, and other surface cleaners.

Laundry detergents, dishwashing liquids and fabric softeners.

Stain removers and pre-wash treatments: products used to treat stains on clothes before washing.

Car wash preparations.

Window and glass cleaners.

Floor cleaning solutions.

Carpet and upholstery cleaners.

Bleach-based cleaners: formulae with bleach (sodium hypochlorite) as a main ingredient.



HS 340231 – Non-ionic organic surface-active agents, whether or not put up for retail sale

Product examples include:

Non-ionic surfactants: ethoxylated alcohols, used in household and industrial cleaning products for their effective grease-cutting properties.

Laundry detergents and dishwashing liquids.

Emulsifiers used in cosmetics and pharmaceuticals to stabilise formulations.

Dispersing agents applied in agricultural chemicals to improve the distribution of active ingredients.

Paints and coatings.

HS 340239 – Non-ionic organic surface-active agents, not put up for retail sale

Product examples include:

Non-ionic surfactants: alcohol ethoxylates, commonly used in industrial cleaning formulations for their effective grease-cutting properties.

Detergents for industrial use, for cleaning machinery and equipment in manufacturing plants.

Emulsifying agents used in agrochemicals to improve the dispersion of active ingredients.

Dispersants in paints and coatings to maintain even distribution of pigments.

Oilfield chemicals used in enhanced oil recovery processes to improve efficiency.

Textile processing aids used in dyeing and finishing processes to ensure uniform results.

Pharmaceutical applications, such as stabilisers in medicinal formulations.



HS 340241 – Cationic organic surface-active agents, whether or not put up for retail sale

Product examples include:

Cationic surfactants: quaternary ammonium compounds such as cetyltrimonium bromide, used in personal care products like hair conditioners for their conditioning properties.

Fabric softeners to improve fabric texture and reduce static cling in laundry applications.

Disinfectants in healthcare and industrial settings for their antimicrobial properties.

Emulsifiers used in cosmetics and pharmaceuticals to stabilise formulations.

Antistatic agents applied in textile and plastic industries to prevent static buildup.

Water treatment chemicals for the purification and conditioning of water in industrial processes.



HS 340242 – Cationic organic surface-active agents, not put up for retail sale

Product examples include:

Cationic surfactants: benzalkonium chloride, commonly used in industrial cleaning formulations for strong antimicrobial properties.

Disinfectants in healthcare and industrial settings for their antimicrobial properties.

Water treatment chemicals for the purification and conditioning of water in industrial processes.

Textile softeners applied during the manufacturing process to improve fabric feel and reduce static.

Emulsifiers for industrial applications, in lubricants, fuels, and coatings to maintain product stability.

Paper and pulp processing aids to enhance the quality and durability of paper products.

HS 340249 – Cationic organic surface-active agents, whether or not put up for retail sale

Product examples include:

Cationic surfactants: quaternary ammonium compounds, often used in fabric softeners and disinfectants.



Disinfectants in healthcare and industrial settings for their antimicrobial properties.

Fabric softeners to improve fabric texture and reduce static cling in laundry applications.

Hair conditioners to reduce hair tangling.

Emulsifiers in personal care products like creams and lotions to enhance product stability.

Antistatic agents applied in textile and plastic industries to prevent static buildup.

HS 340250 – Non-ionic organic surface-active agents, whether or not put up for retail sale

Product examples include:

Non-ionic surfactants: polyethylene glycol ethers of fatty alcohols, commonly found in dishwashing liquids, and laundry detergents.

Emulsifiers in personal care products like creams and lotions to enhance product stability.

Industrial cleaning agents effective in removing oils and grease in industrial processes.

Textile auxiliaries used in dyeing and finishing processes to enhance fabric quality.

Food industry applications, such as emulsifiers and stabilisers in food products.

Agricultural chemicals such as adjuvants in pesticide formulations to improve efficacy.

Paints and coatings, as dispersing agents to improve consistency and performance.



HS 340290 – Surface-active preparations, washing preparations, incl. auxiliary washing preparation

Product examples include.

Specialised industrial cleaning agents: used in specific industrial applications, e.g., manufacturing, automotive, aviation, or marine industries.

Disinfectants and sanitisers: certain disinfectants and sanitisers used in homes, public spaces, and healthcare settings.

Metal cleaning preparations: for cleaning and maintaining metal surfaces, including rust removers and polish.

Electronics cleaning solutions: for electronic devices and components, formulated to be effective without causing damage.

Degreasers: heavy-duty cleaning agents used in both industrial and household settings for removing grease and oil from surfaces.

Dry-cleaning solvents and preparations: used in the dry-cleaning process.

Odour Neutralizers: designed to neutralise or eliminate odours.

Enzymatic cleaners: use enzymes to break down stains and soils, particularly in laundry and carpet cleaning.

Janitorial cleaning supplies: general cleaning products used in commercial buildings, schools, and institutions.

Aircraft and boat cleaning preparations: for cleaning and maintaining aircraft and boats, which may require specific formulations due to exposure to unique environments.





Executive summary

The global cleaning product market is sizeable and continues on an upward trajectory, driven by demand for promotions with the likes of natural cleaning products, consumer preferences for organic solutions and innovative production. Key manufacturers are leveraging strategies like celebrity endorsements and sustainable packaging to capture market share. Worldwide revenues in the segment are estimated at \$177.3 billion in 2024 and projected to increase on a CAGR of 3.7% between 2018 and 2028, rising to \$207 billion by 2028.

Reaching a value of \$37.8 billion in exports in 2022. Germany leads exports with \$4.4 billion, followed by the United States with \$3.9 billion and China with \$3.3 billion. Europe boasts a strong presence amongst exporters with five countries, Germany at \$4.4 billion, Belgium at \$3 billion, France at \$2.1 billion, Netherlands and \$1.9 billion and Italy at \$1.8 billion, ranking among the top 10. Jordan's export value is significantly lower at \$155 million.

Germany again takes the lead with \$2.8 billion in imports, followed by the United States and France at \$2.0 billion, and the United Kingdom at \$1.8 billion. Jordan's import value is again significantly lower at \$86 million.

In North America, increased household spending and environmental concerns fuel demand, while intense competition characterises the market. In the Asia-Pacific region, rising urbanisation and cultural emphasis on cleanliness are driving significant growth, particularly in countries like China, Japan, and South Korea, presenting lucrative prospects for manufacturers aiming to expand their presence in the household cleaning sector.

Jordan's cleaning product exports experienced significant growth from 2018 to 2022, reaching a peak of \$218.7 million in 2022. Despite fluctuations among destinations, Iraq remained the primary market, with \$120.6 million in exports, followed by Saudi Arabia, which saw a rise of over 150% to \$49.7 million. Libya's imports surged nearly eightfold to \$23.3 million, while Yemen's remained low at \$3.9 million. A closer look at sub-product levels reveals that the dominant category, "Surface-active preparations, washing preparations, HS 340290, experienced a near quadrupling of exports from \$50.7 million in 2018 to \$191.4 million in 2022, indicating potential growth opportunities. Additionally, emerging export categories in 2022, albeit with modest values, hint at potential diversification within Jordan's cleaning product export landscape.

With respect to the study's priority markets, in the United States, import values nearly doubled from 2018 to 2022, reaching \$2.05 billion, with Mexico and Canada representing top suppliers. In Saudi Arabia, imports steadily rose to \$405.6 million in 2022. The United Arab Emirates experienced substantial growth in imports, reaching \$622 million in 2022, with Saudi Arabia and India as top suppliers.



Product overview



The chart displays the projected worldwide revenue for three household cleaning categories from 2018 to 2028. The Y-axis represents revenue in billions of dollars, ranging from \$0.0 to \$250.0. The X-axis shows the years from 2018 to 2028. Laundry Care consistently leads in revenue, followed by Household Cleaners, and Dishwashing Detergents. The total revenue shows a steady upward trend over the decade.

Year	Dishwashing Detergents	Household Cleaners	Laundry Care	Total
2018	22.0	30.0	85.0	137.0
2019	22.0	31.0	86.0	139.0
2020	23.0	33.0	90.0	146.0
2021	25.0	36.0	96.0	157.0
2022	24.0	34.0	96.0	154.0
2023	26.0	37.0	103.0	166.0
2024	28.0	39.0	107.0	174.0
2025	30.0	41.0	111.0	182.0
2026	31.0	42.0	115.0	188.0
2027	32.0	44.0	118.0	194.0
2028	34.0	47.0	122.0	203.0

Exports and imports

¹ Statista. (2024). Home & Laundry Care - Worldwide | Statista Market Forecast. Polishes, room scents and insecticides have been excluded from total revenue estimates. [online] Available at: <https://www.statista.com/outlook/cmo/home-laundry-care/worldwide#revenue%20>

² ITC (2022). Trade Map - List of exporters for the selected product in 2022 (Organic surface-active agents (excl. soap); surface-active preparations, washing preparations, ...). [online] Trademap.org. Available at: https://www.trademap.org/Country_SelProduct.aspx?nvpm=1%7c%7c%7c%7c%7c3402%7c%7c%7c4%7c1%7c1%7c2%7c1%7c%7c2%7c1%7c%7c1%7c%7c1

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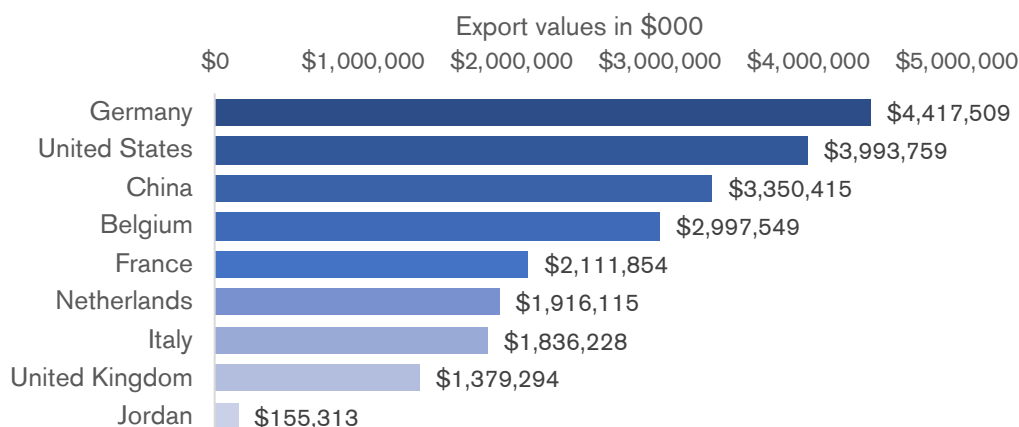


Chart 2 Leading exporters of HS 3402 by value in 2022, in \$'000

In import trade, Germany led the pack with \$2.8 billion in the value of shipments, followed closely by the United States at \$2.0 billion, France at \$2.0 billion, and the United Kingdom at \$1.8 billion.⁴ Europe maintains a significant presence on both sides of the trade equation with five countries (Germany - \$2.8 billion, France - \$2.0 billion, United Kingdom - \$1.8 billion, Belgium - \$1.5 billion, Netherlands - \$1.3 billion) appearing in the top 10 for imports. North America is also well-represented with the US (\$2.0 billion) and Canada (\$1.7 billion) among the top importers. Interestingly, China, ranked 3rd for exports at \$3.3 billion, also appears as the 6th largest importer at \$1.7 billion, highlighting active participation in both aspects of the global cleaning product trade. Jordan's import value of \$86 million is significantly lower. Between 2015 and 2022, cleaning product imports experienced a steady increase, growing at a CAGR of 5%.⁵



Chart 3 Leading importers of HS 3402 by value in 2022, in \$'000

⁴ITC (2022). Trade Map - List of importers for the selected product (Organic surface-active agents (excl. soap); surface-active preparations, washing preparations, ...). [online] Available at: https://www.trademap.org/Country_SelProduct_TS.aspx?nvpm=1%7c%7c%7c%7c%7c3402%7c%7c%7c4%7c1%7c1%7c1%7c2%7c1%7c2%7c1%7c1%7c1

⁵Refer to footnote 2.



Market dynamics



Demand and supply trends

Natural household cleaners market opportunities

The global market for natural household cleaning products is expected to present opportunities, through innovating products and packaging, competitive advertising, brand development, and online promotions. Key manufacturers are employing diverse strategies to attract a broad customer base, including introducing new products, seeking endorsements from celebrities, adopting new technologies, expanding distribution channels, and engaging in mergers and acquisitions. A case in point is the launch of the "Lizol Kitchen" campaign by Reckitt Benckiser Group Plc in August 2018, focusing on germ-fighting kitchen products.⁶

Growing demand for organic cleaning products

Consumers are increasingly seeking organic cleaning products, particularly for toilet care and dishwashing, with a preference for natural ingredients and refreshing scents. For example, Unilever introduced a new dishwashing liquid in December 2021, formulated with 100% naturally derived ingredients. This product is more renewable, 99% biodegradable, and comes in bottles made with 100% recyclable plastic.⁷

North America remains the largest market

The North American market is poised for significant growth due to growing environmental concerns driving the demand for safe and organic homecare products from 2023 to 2028. Factors such as the well-established real estate sector, household spending, and increased housing units contribute to the higher sales of household cleaners in the United States. Additionally, the rising usage of household cleaners like surface deodorizers is anticipated to fuel the demand for these products in the region. Consequently, manufacturers are introducing new fragrances such as citrus and natural deodorizers, with fresheners playing a crucial role in consumer purchasing decisions. For example, in February 2022, SC Johnson Professional unveiled its Quaternary Disinfectant Cleaner in a new, user-friendly squeeze-and-pour bottle.⁸

A highly competitive market

The market for household cleaners is fiercely competitive, featuring key players like Henkel AG & Co. KGaA, Colgate-Palmolive Company, Reckitt Benckiser Group plc, Procter & Gamble Company, and Unilever PLC. The market also sees the participation of private-label brands, driven by intense price competition. Major manufacturers in the household cleaners' sector are strategically targeting emerging markets to seize growth opportunities and broaden their revenue streams.⁹

Asia-Pacific market growth

The Asia-Pacific cleaning products market is experiencing significant growth, with noteworthy developments in key countries. In China, the market is projected to reach \$ 6.15 billion by 2030, driven by urbanisation, a growing middle class, and increased demand for convenient cleaning solutions. Rising disposable incomes have elevated consumer spending on household goods, particularly surface cleaning products. In Japan, sales of surface cleaning products are anticipated to hit \$ 956.45 million by 2033, fuelled by the country's emphasis on cleanliness and hygiene, stringent standards, and the cultural practice of regular cleaning. Japan's ageing population further boosts demand for germ-eradicating cleaning products, particularly in healthcare and elderly care settings. Similarly, in South Korea, a cultural emphasis on personal hygiene and cleanliness drives demand for surface cleaning products, with the market predicted to reach \$ 581.37 million by 2033.¹⁰

⁶ Straits Research (2022). Natural Household Cleaners Market Size, Growth Trends and Competitive Analysis 2030. [online] Available at: <https://straitsresearch.com/report/natural-household-cleaners-market>

⁷ Mordorintelligence.com. (2023). Household Cleaning Products Market - Overview, Report & Trends. [online] Available at: <https://www.mordorintelligence.com/industry-reports/household-cleaners-market>

⁸ Ibid.

⁹ Ibid.

¹⁰ Factmr.com. (2023). Fact.MR – Surface Cleaning Products Market Forecas – Global Market Insights 2023 to 2033. [online] Available at: <https://www.factmr.com/report/85/surface-cleaning-products-market>



Market concentration and product complexity

Market concentration.

A Shannon Entropy value of 5.04 in 2022 for cleaning products, HS code 3402 – as stated in this study – suggests a market with a relatively large number of players worldwide. This is further supported by 32 countries contributing to the majority of global category trade.¹¹

Product complexity score

A score of -0.06 for pesticides in 2022, ranking it 583 out of 1033 in the HS 4 classifications, indicates a moderate to lower level of complexity to produce. Scores at the HS6 levels in 2021 ranged from -0.37 for HS 340211 Anionic surface-active agents, to 0.43 for HS 340219 organic surface-active agents, and 0.23 for HS 340290 Organic surfactant washing, cleaning preparations.¹²

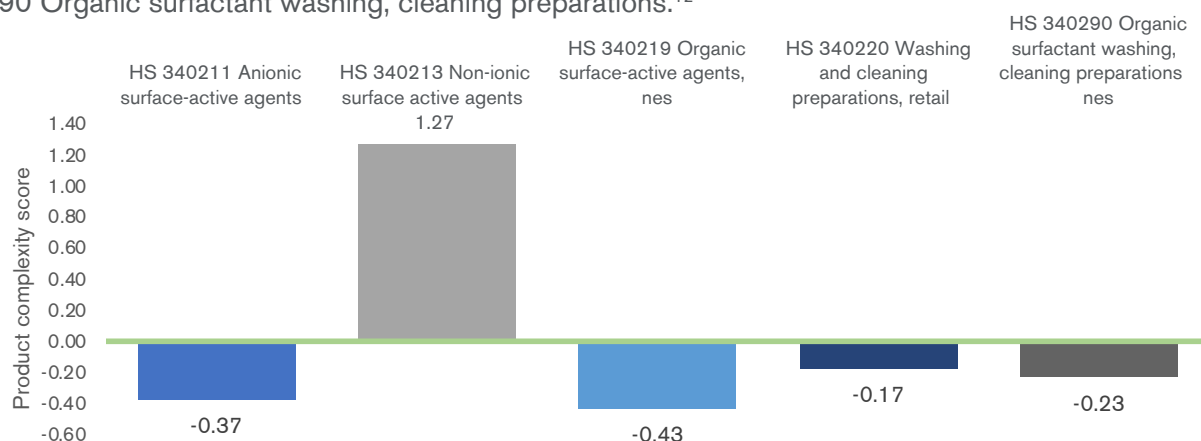


Chart 4 Cleaning products complexity on the HS6 level in 2021

Regarding historical progress in the Product Complexity Index (PCI), cleaning products HS 3402 scores, increased very slightly from -0.07 to -0.06 between 2012 and 2022 suggesting a moderate to low level of product complexity. Declines were most evident in Anionic surface-active agents (HS 340211) with a score of -0.37 by 2022. Cationic surface-active agents HS 340212 exhibited a rise in complexity to 1.29 in 2018 followed by a decline to 0.27 in 2021. An interesting contrast emerges with Organic surfactant washing preparations (HS 340290), which maintain a stable score (-0.23 by 2022), potentially indicating consistent formulations over the past decade.

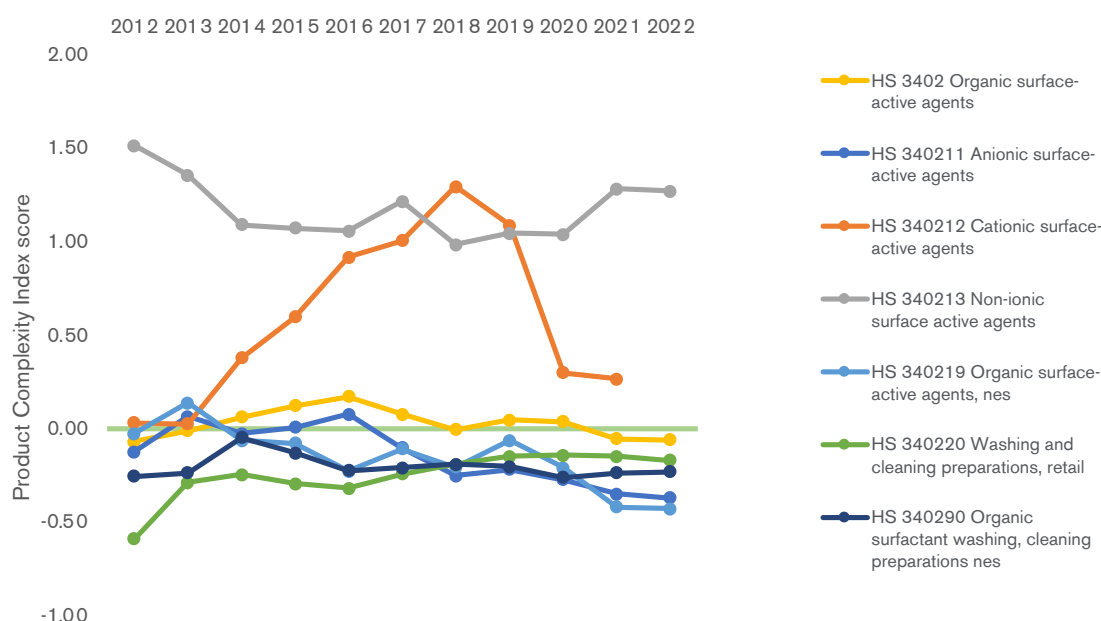


Chart 5 Cleaning products complexity 2012 to 2021

¹¹ OEC. (2022). Cleaning Products (HS: Organic) Product Trade, Exporters and. [online] Available at: <https://oec.world/en/profile/hs/cleaning-products>

¹² Ibid.

World trade statistics by cleaning products on the HS6 level

Colour key
Jordan represents > 10% of 2022 world exports
Jordan represents > 1% and <5% of 2022 world exports
Jordan represents > 0% and <1% of 2022 world exports
Exports from Jordan not in evidence in 2022

HS Code	2022 world exports	2022 top export value and territory	2022 top import value and territory	Jordan 2022 export value	Jordan's share in global export markets
<u>340211</u> Anionic organic surface-active agents, whether or not put up for retail sale	\$4.3 billion	\$643.4 million Germany	\$309.5 million United States	\$2.8 million	0.1%
<u>340212</u> Cationic organic surface-active agents, whether or not put up for retail sale	\$728.4 million	\$261.2 million China	\$67.7 million United States	\$84,000	0.02%
<u>340213</u> Non-ionic organic surface-active agents, whether or not put up for retail sale	\$6.5 billion	\$1 billion Germany	\$492.7 million China	\$776,000	0.01%
<u>340219</u> Organic surface-active agents, whether or not put up for retail sale	\$1.1 billion	\$136.1 million China	\$65.5 million United Kingdom	\$2.1 million	0.2%
<u>340220</u> Surface-active preparations, washing preparations, auxiliary washing preparations and cleaning	\$15.8 billion	\$1.3 billion France	\$1.6 billion Germany	\$21.4 million	0.1%
<u>340290</u> Surface-active preparations, washing preparations, incl. auxiliary washing preparation	\$9.1 billion	\$1.2 billion United States	\$506.2 million China	\$191.3 million	2.1%

Table 1 Cleaning products, (HS 3402) trade statistics and Jordan export market share



HS 3402 in the context of Jordanian exports

Jordan's cleaning product exports experienced positive growth from 2018 to 2022, with a total increase of \$110.3 million despite variations within destinations. Global exports steadily climbed to a peak of \$218.7 million in 2022 (CAGR of 15%).¹³

Major markets for Jordan's HS 3402 exports, 2018 to 2022

Since 2018, Iraq remained Jordan's primary destination, reaching \$120.6 million in 2022. Saudi Arabia exhibited a significant rise – over 150% growth – to \$49.7 million in 2022. Libya's imports grew nearly eightfold to \$23.3 million in 2022, while shipments to Yemen remained low after a 2021 spike (\$3.9 million in 2022). Palestine, Kuwait, and United Arab Emirates witnessed moderate growth, reaching \$3.3 million, \$3.2 million, and \$3.1 million respectively in 2022.¹⁴

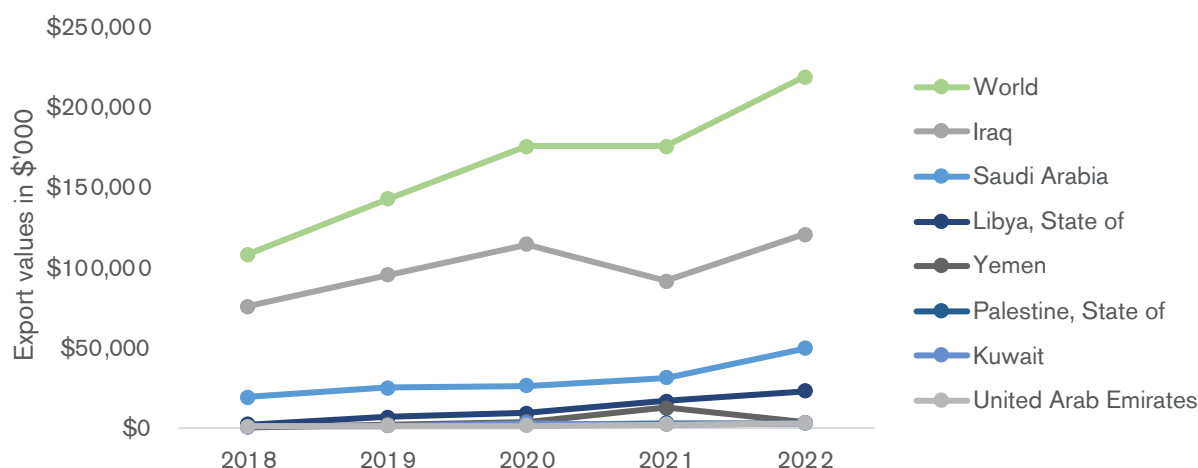


Chart 6 Jordan's leading HS 3402 export markets 2018 to 2022

A deeper dive into the sub-product level reveals a more nuanced picture of Jordan's cleaning product exports. The dominant category, surface-active preparations, washing preparations, HS 340290, witnessed significant growth, with exports nearly quadrupling from \$50.7 million in 2018 to a significant \$191.4 million in 2022. This substantial increase suggests a potential focus area within Jordan's cleaning product exports.

Interestingly, 2022 marked the emergence of several new export categories, including HS 340250, HS 340239, and others. While their values are currently modest, ranging from \$119,000 to \$2.6 million, their appearance hints at potential diversification within Jordan's cleaning product export landscape. By contrast, exports that for a number of export categories had been consistent or consistently growing between 2018 and 2022, such as HS 340220, Surface-active preparations, and HS 340211, anionic organic surface-active agents, were not evidenced in 2022.

¹³ ITC (2022). Trade Map - List of importing markets for a product exported by Jordan(Organic surface-active agents (excl. soap); surface-active preparations, washing preparations, ...). [online]. Available at: https://www.trademap.org/Country_SelProductCountry_TS.aspx?nvpm=1%7c400%7c%7c%7c3402%7c%7c%7c4%7c1%7c1%7c2%7c2%7c1%7c2%7c1%7c1%7c1

¹⁴ Ibid.

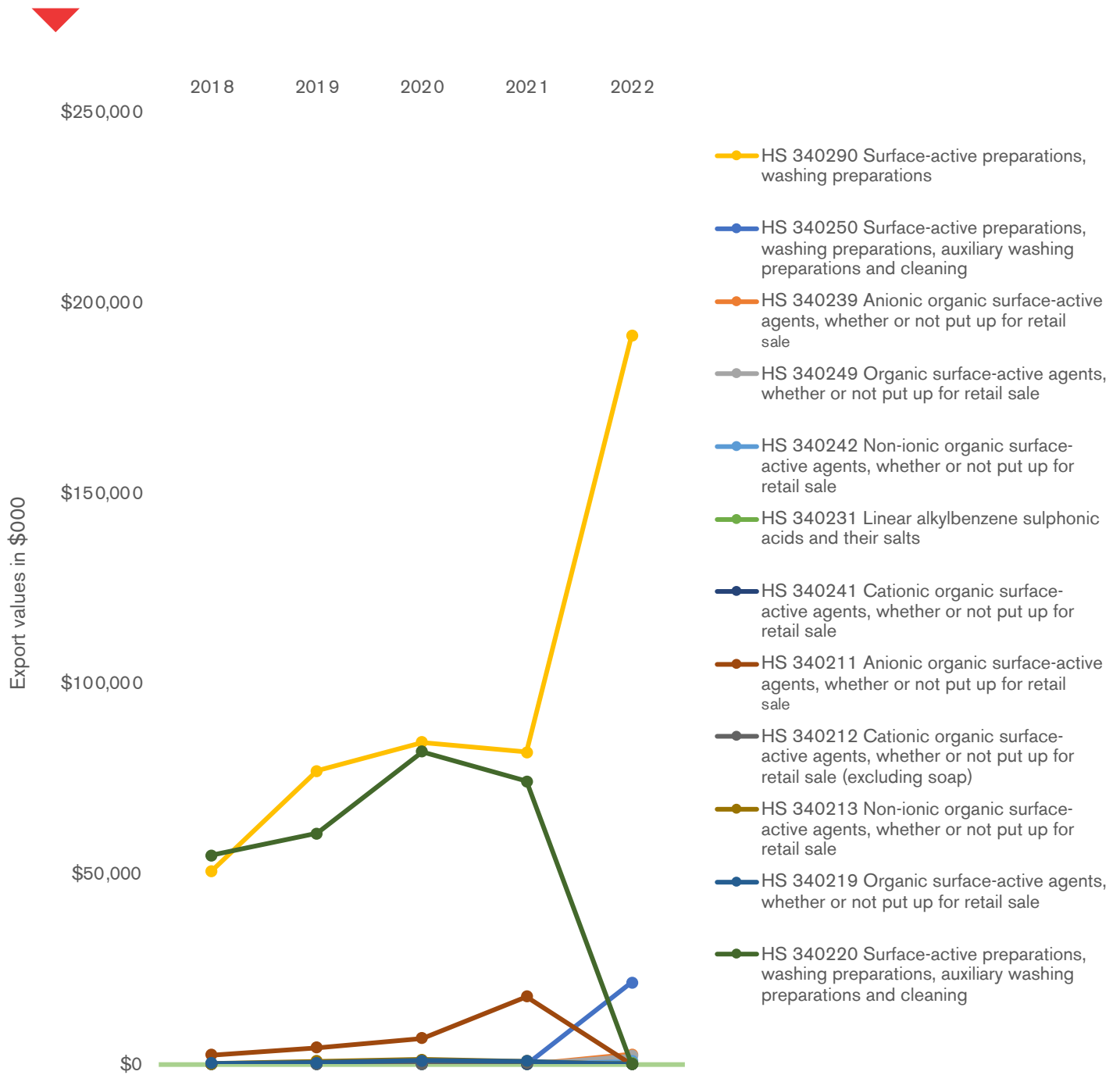


Chart 7 Jordan's 2022 HS 3402 export value by HS6 level



Priority markets



United States of America

United States macroeconomic overview

Representing the world's largest economy at \$27 trillion in 2023, real GDP in the United States is reported to have grown 2.5% in 2023, compared with 1.9% in 2022, reflecting growth in consumer spending, exports, government spending and investment. Imports in the meantime also increased. Per capita GDP in 2022 was registered at \$76,330.

United States cleaning products revenue

The United States' household cleaning products market is projected for modest growth, with total revenue climbing from \$26 billion in 2018 to \$35.8 billion in 2028, reflecting a CAGR of 2.7%. 2024 estimates are valued at \$32.3 billion.

The laundry care market leads the household cleaning category, valued at \$15.8 billion in 2024. Household cleaners and dishwashing detergent sales are respectively estimated at \$8 billion and \$3.7 billion in 2024.¹⁵

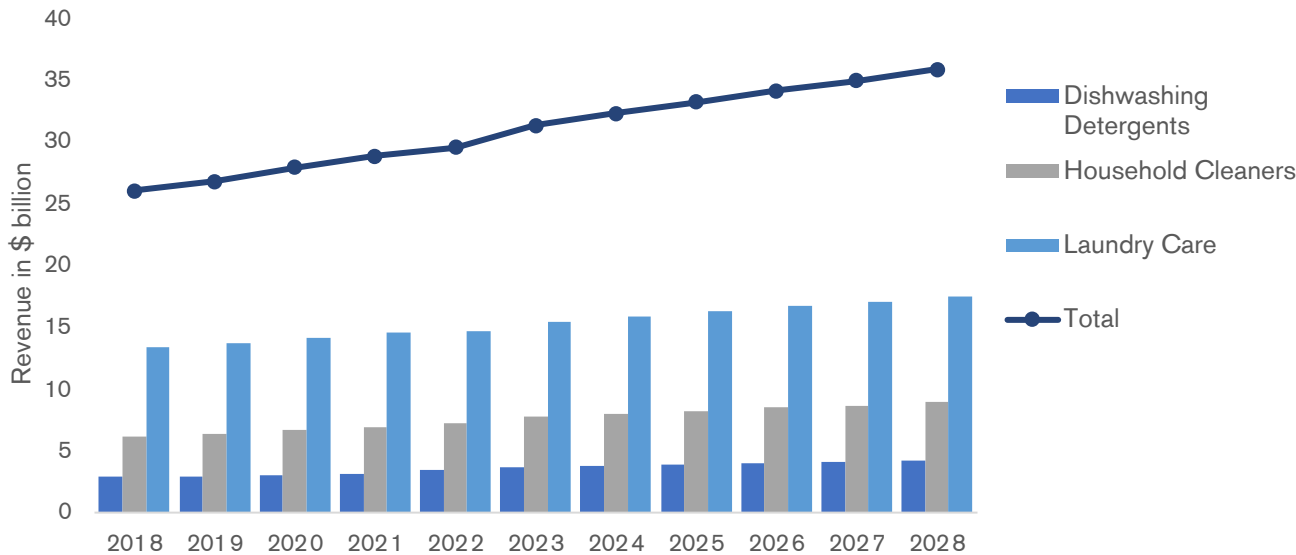


Chart 8 US cleaning products revenue in \$ billion, 2018 to 2022

The laundry care market leads the household cleaning category, with average revenue per capita valued at \$46.20 in 2024. Household cleaners and dishwashing detergent sales are respectively estimated at \$23.30 and \$10.90 in 2024.¹⁶

¹⁵ Statista. (2024). Home & Laundry Care - United States | Market Forecast. Polishes, room scents and insecticides have been excluded from total revenue estimates. [online] Available at: <https://www.statista.com/outlook/cmo/home-laundry-care/united-states#revenue>
¹⁶ Statista. (2024). Home & Laundry Care - Saudi Arabia | Market Forecast. Polishes, room scents and insecticides have been excluded from total revenue estimates. [online] Available at: <https://www.statista.com/outlook/cmo/home-laundry-care/united-states#revenue>

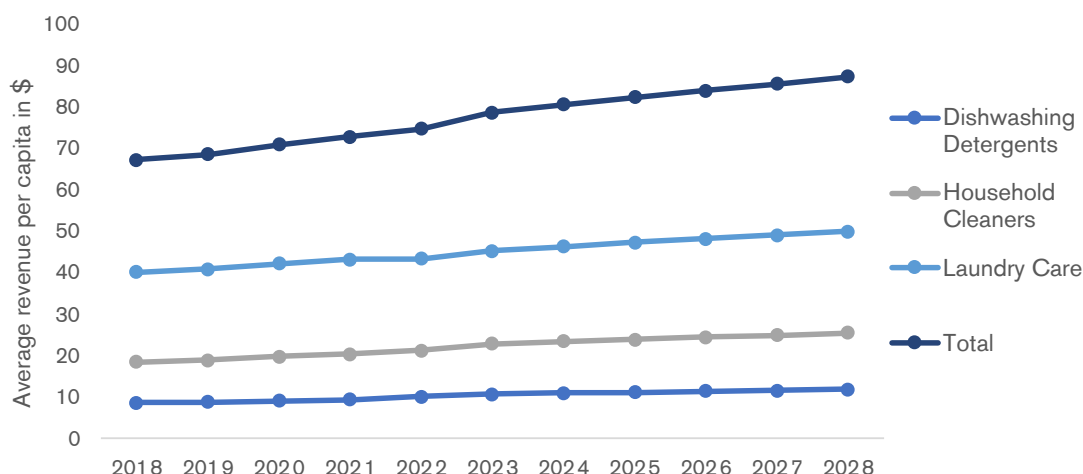


Chart 9 United States cleaning products revenue average per capita, in \$, 2018 to 2028

The total Average Revenue Per Capita (ARPC) in the United States is projected to increase from \$67.2 in 2018 to \$87.3 in 2028, indicating a rise in overall spending. 2024 per capita spending estimates are valued at \$80.5.

United States cleaning products imports

United States cleaning product imports witnessed significant growth, nearly doubling in value from \$1.29 billion in 2018 to \$2.05 billion in 2022, reflecting a CAGR of approximately 8.3% over the period.¹⁷ Mexico remained the top source throughout the period, with imports increasing from \$309.8 million in 2018 to \$613.4 million in 2022, followed by Canada, reaching \$339.8 million in 2022.

The import landscape exhibited interesting shifts within other regions. Germany saw a near 40% increase, reaching \$182.9 million in 2022. China's contribution fluctuated, with a decline in 2019 but a rebound in subsequent years, though not reaching its 2018 peak of \$129.3 million. The United Kingdom displayed a clear upward trend, with imports more than doubling to \$66.7 million in 2022. Jordan's entry in 2020 with a minimal value \$6,000 suggests potential opportunity, although data in 2022 is unavailable.

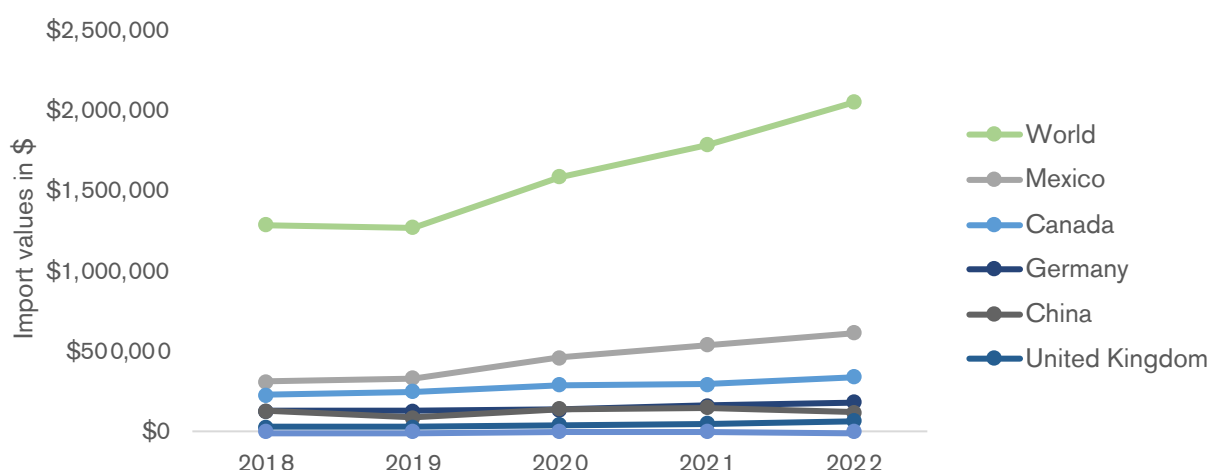


Chart 10 United States cleaning products import values, top exporters, 2018 to 2022

¹⁷ International Trade Centre (ITC) (2022). Trade Map - List of supplying markets for a product imported by United States of America (Organic surface-active agents (excl. soap); surface-active preparations, washing preparations, ...). [online] Available at: https://www.trademap.org/Country_SelProductCountry_TS.aspx?nvpm=1%7c842%7c%7c%7c%7c3402%7c%7c%7c4%7c1%7c1%7c2%7c1%7c2%7c1%7c1%7c1



Analysing import values in \$ per ton reveals a global average price, rising nearly 20% from \$1,733 per ton in 2018 to \$2,073 per ton in 2022. Mexico remained the most affordable source throughout the period, with import rates ranging from \$943 in 2019 to \$1,133 in 2022. Germany on the other hand was highest in terms of value amongst the to suppliers, with imports registered at \$6,491 in 2022.

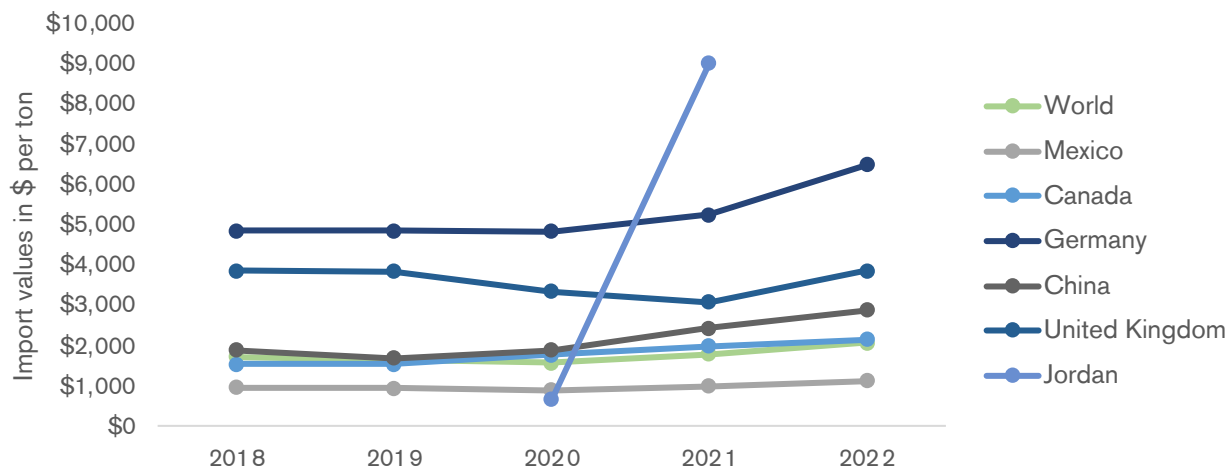


Chart 11 United States cleaning products imports from main supplying countries, in \$ per ton (2018-2022)

United States cleaning products imports from Jordan

Between 2018 and 2022, Jordan exported a total value of only \$24,000 (with \$6,000 in 2020 and \$18,000 in 2021).¹⁸ Surface-active preparations, washing preparations, auxiliary washing preparations, and cleaning products (HS 340220) were the primary export category.

Trade Agreements between USA and Jordan

United States-Jordan Free Trade Agreement. This agreement entered into force on December 17, 2001, and was fully implemented on January 1, 2010. Under this FTA, products can enter the United States duty-free if manufactured in Jordan.¹⁹

Qualifying Industrial Zones (QIZs). The QIZ initiative, established in 1996, allows qualifying industrial zones in Jordan and Egypt, in addition to the West Bank and Gaza, to export products based on United States qualifying criteria, without tariff or quota restrictions.²⁰

¹⁸ ITC (2022). Trade Map - Existing and potential trade between United States of America and Jordan (Organic surface-active agents (excl. soap); surface-active preparations, washing preparations, ...). [online] Available at: https://www.trademap.org/Bilateral_TS.aspx?nvpm=1%7c842%7c%7c400%7c%7c3402%7c%7c%7c6%7c1%7c1%7c1%7c2%7c1%7c1%7c1%7c1%7c1%7c1

¹⁹ Office of the United States Trade Representative - Jordan Free Trade Agreement. [online] Available at: <https://ustr.gov/trade-agreements/free-trade-agreements/jordan-fta>

²⁰ "Qiz Jordan." International Trade Administration | Trade.Gov, 21 Nov. 1996, www.trade.gov/qiz-jordan



United States PESTEL analysis

Politics

The United States is a federal republic with a presidential system of government. It consists of 50 states, each with its own government, and a federal government that oversees the entire country. The President serves as both the head of state and government, and there is a bicameral Congress composed of the Senate and the House of Representatives.

The United States and Jordan maintain strong political relations, characterised by mutual cooperation on regional and global issues. Both nations work closely together within the framework of regional and international organisations to foster peace, stability, and development in the Middle East.

Economics

The United States has the world's largest economy, with a nominal GDP of approximately 25.4 trillion in 2022. It is defined by a diverse and advanced economy, with key sectors including technology, healthcare, finance, manufacturing, and energy. The US economy is driven by strong consumer spending, innovation, and a robust financial system.

The United States is a significant trading partner with Jordan. A key factor in the relationship between both countries is the United States-Jordan Free Trade Agreement (FTA), entered on 17 December 2001 and removing duties starting 1 January 2010. The total trade in goods and services between the two countries reached \$6.3 billion in 2022, with Jordan's exports to the United States amounting to around \$3.9 billion. In addition to direct investment, the United States provides development aid to Jordan, focusing on economic reform, governance, education, and infrastructure development.

Social

The United States has a population of around 333 million people, with a diverse cultural and ethnic composition. English is the primary language, and the country practices a variety of religions, reflecting its multicultural society. The US is known for its high standard of living, social mobility, and a significant emphasis on individual rights and freedoms.

The United States has a strong educational system, with world-renowned universities and research institutions. The literacy rate is high, and there is a strong focus on higher education and research. The healthcare system, while advanced, faces challenges with access and affordability. Health insurance is often provided through private companies, and there are ongoing debates about healthcare reform.

Technology

The US is a leader in technological innovation and research and development (R&D). It is home to many of the world's leading tech companies and has a strong culture of entrepreneurship and innovation. The government and private sector invest heavily in R&D in areas including biotechnology, information technology, and renewable energy.

The United States boasts advanced digital infrastructure with widespread internet access and high penetration of mobile and broadband services. The country is at the forefront of developing technologies such as 5G, artificial intelligence, electric vehicles, and cybersecurity. There is a strong emphasis on digital transformation and the integration of technology across all sectors of the economy.

Environment

The United States is committed to environmental sustainability by setting ambitious goals for reducing greenhouse gas emissions and promoting renewable energy. Key initiatives include investments in clean energy, energy efficiency, and conservation programmes.

The US faces several environmental challenges, including climate change, pollution, and natural resource management. The federal and state governments work on policies to address these issues, such as reducing emissions, improving air and water quality, and conserving natural habitats. However, there is political debate over environmental regulations and their economic impact.



Legal

The United States has a comprehensive legal framework that supports business operations, protects intellectual property, and ensures compliance with regulations. Laws and regulations cover areas such as antitrust, labour, environmental protection, and consumer rights. The legal system provides a fair and transparent environment for businesses and investors.

US labor laws aim to protect workers' rights and ensure fair treatment in the workplace. Key regulations include minimum wage laws, workplace safety standards, and anti-discrimination laws. The labour market is flexible, with significant mobility and opportunities for workers. There are also ongoing discussions about improving workers' rights and benefits, particularly in sectors such as the gig economy.

United States cleaning products suppliers and distributors

Arrow Chemical Products.: A family-owned company based in Michigan that specialises in providing complete cleaning solutions. They offer a range of cleaners, disinfectants, and floor care chemicals, and also provide private labelling and contract manufacturing services for industry partners.

Website: <https://arrowchemicalproducts.com/>

Brame Specialty Company, Inc.: A distributor that provides a comprehensive range of sanitary maintenance products, including cleaning supplies. They serve customers in the Carolinas and Virginia, offering quality products for various cleaning needs.

Website: <https://www.bramespecialty.com/>

Nyco Products.: A manufacturer of professional cleaning and sanitation products. Their product line includes cleaners, disinfectants, floor care products, restroom cleaners, and other janitorial supplies.

Website: <https://www.nycoproducts.com/>

CleanItSupply.: An online company that specialises in providing a wide range of cleaning, janitorial, and office supply products. They offer an extensive selection of items including cleaning chemicals.

Website: <https://www.cleanitsupply.com/>

WAXIE Sanitary Supply.: WAXIE provides an extensive range of sanitary supply products specifically designed for maintaining clean and healthy environments. Their catalogue includes a variety of cleaning supplies, disinfectants, and related items.

Website: <https://info.waxie.com/>

Exhibitions and trade fairs in the United States

Dates	Exhibition name	City	Country	Website
November 18-21, 2024	ISSA Show North America	Las Vegas	United States	https://www.issashow.com/en/home.html
August 23-26, 2025	Clean Show	Orlando	United States	https://the-clean-show.us.messefrankfurt.com/us/en.html



Saudi Arabia

Saudi Arabia macroeconomic overview

Saudi Arabia, pursuing Vision 2030 reforms, was the fastest-growing G20 economy in 2022, with a rise of 8.7%. This was driven by increases in oil production and growth in the non-oil GDP. This growth was prompted by private consumption and non-oil private investments, including large-scale infrastructure projects. As a result, the country is advancing economically, marked by record-low unemployment rates and limited inflation.²¹

Saudi Arabia cleaning products revenue

Saudi Arabia's household cleaning products market is projected for steady growth, with total revenue climbing from \$1.14 billion in 2018 to \$1.87 billion in 2028, reflecting a CAGR of around 4.6%. 2024 estimates are valued at \$1.57 billion.

The laundry care market leads the household cleaning category, valued at \$1.22 billion in 2024. Household cleaners and dishwashing detergent sales are respectively estimated at \$200 million and \$150 million in 2024.²²

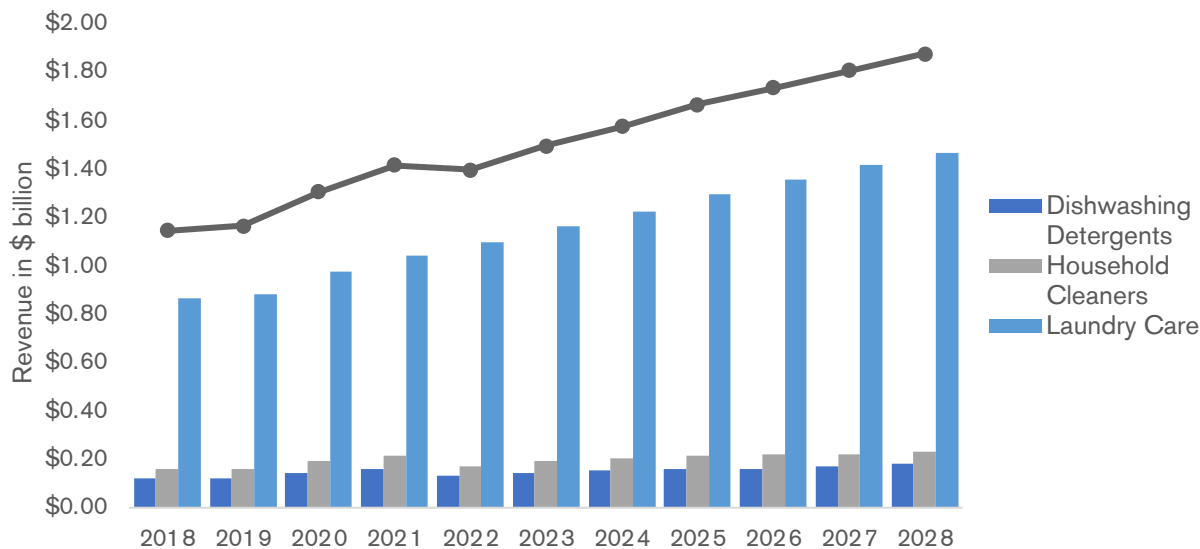


Chart 12 Saudi Arabia cleaning products revenue in \$ billion, 2018 to 2022

The total Average Revenue Per Capita (ARPC) in Saudi Arabia is projected to increase from \$32.6 in 2018 to \$47.3 in 2028, indicating a rise in overall spending.

The laundry care market leads the household cleaning category, with average revenue per capita valued at \$32.60 in 2024. Household cleaners and dishwashing detergent sales are respectively estimated at \$5.30 and \$4 in 2024.²³

²¹ IMF. (2023). Saudi Arabia: 2023 Article IV Consultation-Press Release.
²² Statista. (2024). Home & Laundry Care - Saudi Arabia | Market Forecast. Polishes, room scents and insecticides have been excluded from total revenue estimates. [online] Available at: <https://www.statista.com/outlook/cmo/home-laundry-care/saudi-arabia#revenue%20>
²³ Statista. (2024). Home & Laundry Care - Saudi Arabia | Market Forecast. Polishes, room scents and insecticides have been excluded from total revenue estimates. [online] Available at: <https://www.statista.com/outlook/cmo/home-laundry-care/saudi-arabia#revenue%20>

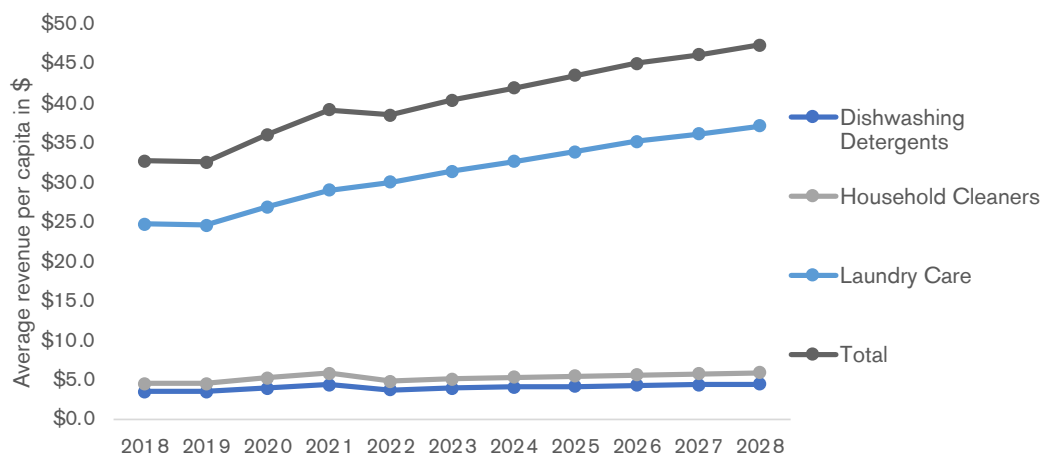


Chart 13 Saudi Arabia cleaning products revenue average per capita, in \$, 2018 to 2028

Saudi Arabia cleaning products imports

Saudi Arabia's cleaning product imports witnessed a steady increase from \$331.7 million in 2018 to \$405.6 million in 2022, reflecting growth of over 22%. The United Arab Emirates remained a significant source within the Middle East, though their contribution peaked at \$80.3 million in 2020 before dipping to \$59.5 million in 2022. Interestingly, Jordan's contribution also grew, reaching \$39.5 million in 2022, up from \$18.5 million in 2018. Egypt showed a modest upward trend, reaching \$35.7 million in 2022. Supplier diversification might be at play, as evidenced by declines in import shares from established sources like the United Kingdom, which went from \$45 million in 2018 to \$43.5 million in 2022, and the United States, whose contribution dropped from \$58.3 million in 2018 to \$33.4 million in 2022. India displayed a moderate upward trend, reaching \$30.7 million in 2022.²⁴

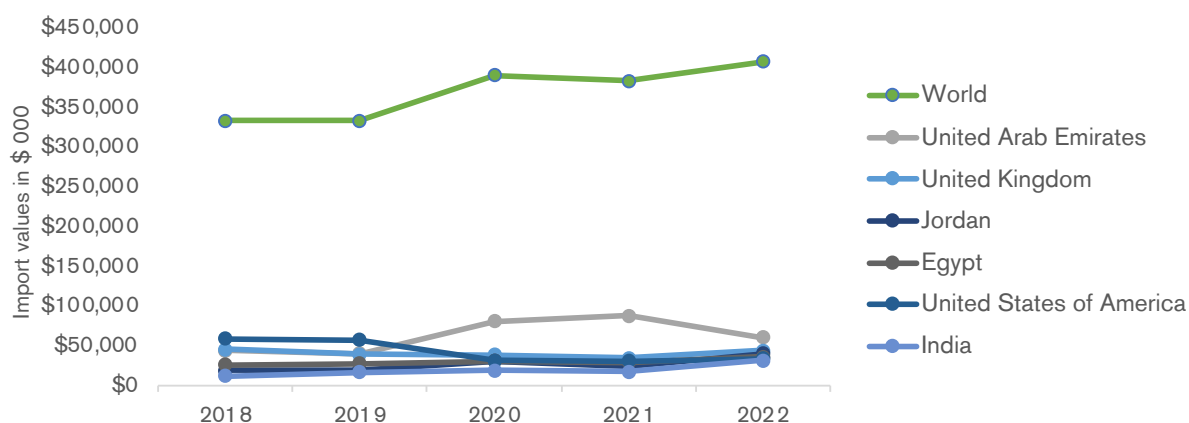


Chart 14 Saudi Arabia cleaning products import values, top exporters, 2018 to 2022

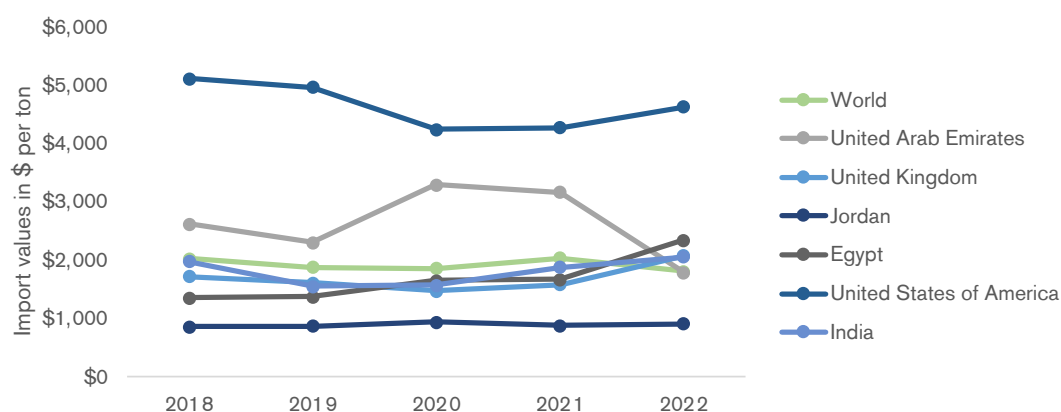


Chart 15 Saudi Arabia cleaning products imports from main supplying countries, in \$ per ton (2022-2018)

²⁴ ITC (2022). Trade Map - List of supplying markets for a product imported by Saudi Arabia (Organic surface-active agents (excl. soap); surface-active preparations, washing preparations, ...). [online] Available at: https://www.trademap.org/Country_SelProductCountry_TS.aspx?nvpm=1%7c682%7c%7c%7c%7c3402%7c%7c%7c4%7c1%7c1%7c2%7c1%7c2%7c1%7c1%7c1



The United States represented the highest import prices throughout the 2018 to 2022 period, though decreasing slightly from \$5,115 in 2018 to \$4,632 in 2022. Shipments from the United Kingdom, maintained consistently lower import prices than the global average, with a slight rise to \$2,075 in 2022. Interestingly, Jordan's import prices remained relatively stable, ranging from \$858 to \$910 per ton throughout the period.²⁵

Saudi Arabia cleaning products imports from Jordan

Jordan's cleaning product exports to Saudi Arabia exhibited a notable increase, especially in recent years. The dominant category, HS 340220, registers no trade in 2022 after exports valued at \$18.2 million in 2018 and \$24.5 million in 2020. Conversely, HS 340290 (surface-active preparations including auxiliary washing preparations) displayed a growth trend, culminating in a significant jump to \$36.3 million in 2022, becoming Jordan's leading export category to Saudi Arabia in that year.

Two new categories emerged in 2022, HS 340242 (non-ionic organic surface-active agents) with exports valued at \$12.5 million and HS 340239 (anionic organic surface-active agents) at \$1 million. Exports with no clear pattern were observed in other categories like HS 340211 (anionic organic surface-active agents), HS 340213 (non-ionic organic surface-active agents), and HS 340219 (organic surface-active agents).²⁶ While limitations exist due to the lack of data on specific products within each HS code, this analysis highlights Jordan's growing presence in the Saudi cleaning product import market, particularly with HS 340290 and the emergence of new categories in 2022.

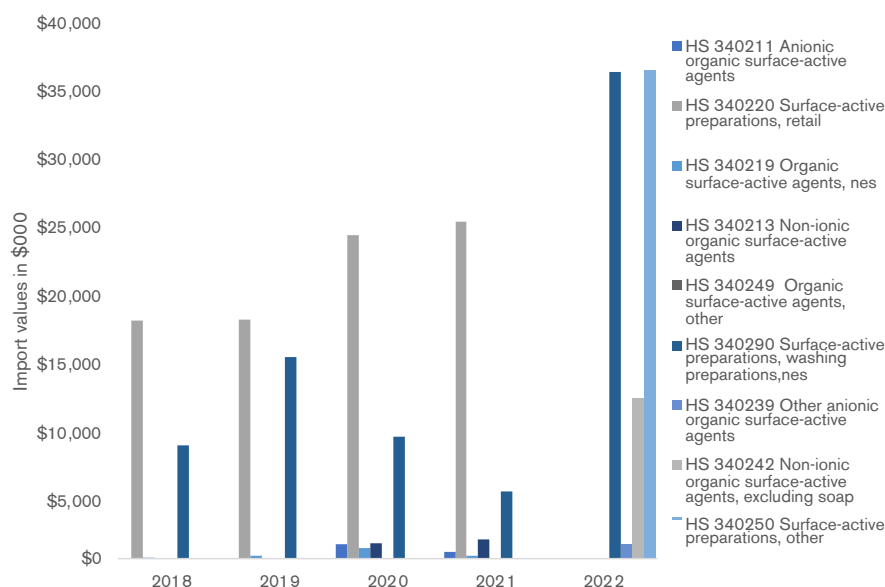


Chart 16 Saudi Arabia cleaning products imports from Jordan, in \$000 (2018-2022)

Trade Agreements between Saudi Arabia and Jordan

Greater Arab Free Trade Area (GAFTA), 1997. Saudi Arabia and Jordan are members of GAFTA, which was established under the umbrella of the Arab League. The agreement aims to create a free trade area among Arab countries by reducing and eliminating tariffs and trade barriers among member states. GAFTA includes 18 Arab countries and promotes increased trade and economic integration in the region.

Bilateral Economic Agreement, 1962. This agreement covers various aspects of economic cooperation, including the movement and transfer of persons, commodities, and capital. It also addresses transportation and transit regulations, the facilitation of commerce, and the fishing rights of professional fishermen in each other's territorial waters.

Trade and Economic Cooperation Agreement, 2022. A memorandum of understanding was signed between the Makkah Chamber of Commerce and Industry and its counterpart in Amman. This agreement aims to develop bilateral economic relations and increase trade exchange.²⁷

²⁵ ITC (2022). Trade Map - List of supplying markets for a product imported by Saudi Arabia (Organic surface-active agents (excl. soap); surface-active preparations, washing preparations, ...). [online]. Available at: https://www.trademap.org/Country_SelfProductCountry_TS.aspx?nvpm=1%7c682%7c%7c%7c%7c3402%7c%7c%7c4%7c1%7c1%7c2%7c1%7c2%7c3%7c1%7c1

²⁶ ITC (2022). Trade Map - Existing and potential trade between Saudi Arabia and Jordan Arabia (Organic surface-active agents (excl. soap); surface-active preparations, washing preparations, ...). [online]. Available at: https://www.trademap.org/Bilateral_TS.aspx?nvpm=1%7c682%7c%7c400%7c%7c3402%7c%7c%7c6%7c1%7c1%7c1%7c2%7c1%7c1%7c1%7c1

²⁷ Arab News: March 04, 2022- Saudi Arabia, Jordan eye trade relations over \$1bn with new agreement: [online] Available at: <https://www.arabnews.com/node/2036126/business-economy>



Agricultural Trade Agreement, 2023. Saudi Arabia and Jordan signed an agreement to boost agricultural trade, largely focused on fish. This agreement aims to strengthen trade exchanges between the private sectors of both countries and support the development of the fishery industry in Jordan.

Agreement Land Transport Connectivity, 2023. Saudi Arabia and Jordan reached an agreement to enhance land transport connectivity, which is expected to significantly improve trade and economic collaboration between the two countries. This agreement is part of broader efforts to strengthen bilateral trade ties.

Saudi Arabia PESTEL analysis

Politics

Saudi Arabia is a monarchy with strong governance, where political stability is a central feature. As a key Middle Eastern state, its foreign policies and relations within the Gulf Cooperation Council, the United Nations and OPEC have significant regional and global implications.

Saudi Arabia and Jordan have worked closely on regional and international issues and are seen as having model diplomatic relations.

Economics

In 2022, Saudi Arabia's GDP was \$1.1 trillion, making it the largest economy in the Middle East. Oil and gas revenues contribute about 80% to GDP. Economic diversification is currently underway through the Vision 2030 programme.

Saudi Arabia is furthermore Jordan's largest economic partner, with investments exceeding \$13 billion. Trade between the two countries reached around \$5 billion in 2021. Saudi Arabia has also been a major donor to Jordan, providing substantial financial assistance, including a 2022 direct funding of \$50 million as part of a larger economic aid package agreed upon in 2018.

Social

Saudi Arabia has a young population, with over 50% under the age of 25. The country has a high standard of living and a significant expatriate community. Arabic is the official language, and Islam is the state religion.

Saudi Arabia has undertaken reforms as part of its Vision 2030 programme, to increase the inclusion of females in the workforce, and promote entertainment and tourism.

The government is investing in education and skills development to prepare the workforce for a diversified economy. There is a focus on STEM (science, technology, engineering, and mathematics) education to meet the needs of emerging industries.

Technology

Saudi Arabia is investing in research and development to foster innovation, particularly in technology and renewable energy sectors. Initiatives such as NEOM, a planned smart city, are examples of this push towards innovation. Notable sector programmes include the Badir technology incubator, Middle East Venture Partners, Monshaat and UnitX, an artificial intelligence and digital transformation startup.

Saudi Arabia is rapidly advancing its digital infrastructure, with widespread adoption of technologies like 5G, e-commerce, and digital banking. The government supports digital transformation through various policies and investments.



With increasing digitalization, cybersecurity has become a critical focus area to protect against cyber threats and ensure the safety of digital transactions and data. The government and private sector are investing heavily in cybersecurity measures to safeguard the growing digital economy.

Environment

The country is engaged in global environmental agreements and is investing in renewable energy sources. Efforts are being made to reduce CO2 emissions and reliance on fossil fuels, in addition to managing water resources more efficiently.

Environmental issues include desertification and water scarcity. The government is actively working on environmental sustainability projects.

Legal

The legal system is based on Sharia law. There have been efforts to improve the business environment, including reforms in judicial processes and regulations affecting foreign investments. Saudi Arabia has also enhanced its corporate governance standards to attract more foreign direct investment.

Businesses operating in Saudi Arabia must comply with stringent regulations related to anti-corruption, financial reporting, and corporate governance. The government is enhancing regulatory frameworks to align with international standards.

Saudi Arabia has implemented labour reforms to improve working conditions and promote the employment of Saudi nationals over expatriates. The Nitaqat program is a key initiative in this regard.

Saudi Arabia cleaning products suppliers and distributors

Advance Hygiene: A supplier that focuses on hygiene and cleaning products. With branches in Riyadh, Jeddah and Khobar, they offer a wide range of hygiene and cleaning products across various categories.

Website: <https://www.advancehygieneksa.com/>

Al Sallal for Cleaning Materials and Professional Hygiene Products: A Saudi company specialising in professional cleaning and hygiene solutions. Their product range caters to various sectors, including restaurants, cafes, hotels, hospitals, and homes.

Website: <https://alsallal.sa/>

United Industrial Chemicals (U.I.C.): A leading distributor of industrial chemicals and lubricants in the Middle East, offering a comprehensive range of products including detergents and cleaning solutions.

Website: <https://uic.com.sa/>

Knooz Al-Ardh Detergent Factory Company LLC. One of the leading manufacturers of domestic and industrial cleaning chemicals in Saudi Arabia. Some of their product categories include fabric softener, multi-purpose cleaner, antiseptic disinfectant, and washing liquid.

Website: <https://www.knooz-sa.com/>

HFCDA Humaidan Factory for Cleaning and Detergent Agents. HFCDA is involved in the production of various cleaning and detergent products, including items such as liquid soap, floor disinfectants, and hair and body shampoo. They also offer private labelling services.

Website: <https://hfcda.com/>

Exhibitions and trade fairs in Saudi Arabia

Dates	Exhibition name	City	Country	Website
24 to 27 February 2025	Saudi FM & Clean Expo	Riyadh	Saudi Arabia	https://www.dmgevents-me.com/holding-sites/urban-services-expo/index.html



United Arab Emirates

United Arab Emirates macroeconomic overview
GDP growth of 3.5% was estimated for 2023 in the United Arab Emirates, following a 7.4% growth in 2022.²⁸ Inflation is currently projected at 3.4%. The implementation of an IMF reform is further expected to limit medium-term growth.²⁹

Economic growth is forecasted to slow, though support exists due to strong oil pricing and economic policies focused on foreign investment, which are intended to aid diversification strategies.

United Arab Emirates cleaning products revenue
The United Arab Emirates household cleaning products market is projected for slight growth, with total revenue climbing from \$420 million in 2018, to \$498 million in 2028, reflecting a CAGR of 1.6%. 2024 estimates are valued at \$462 million.

The laundry care market leads the household cleaning category, valued at \$253 million in 2024. Household cleaners and dishwashing detergents are respectively estimated at \$126 million and \$83 million in 2024.³⁰

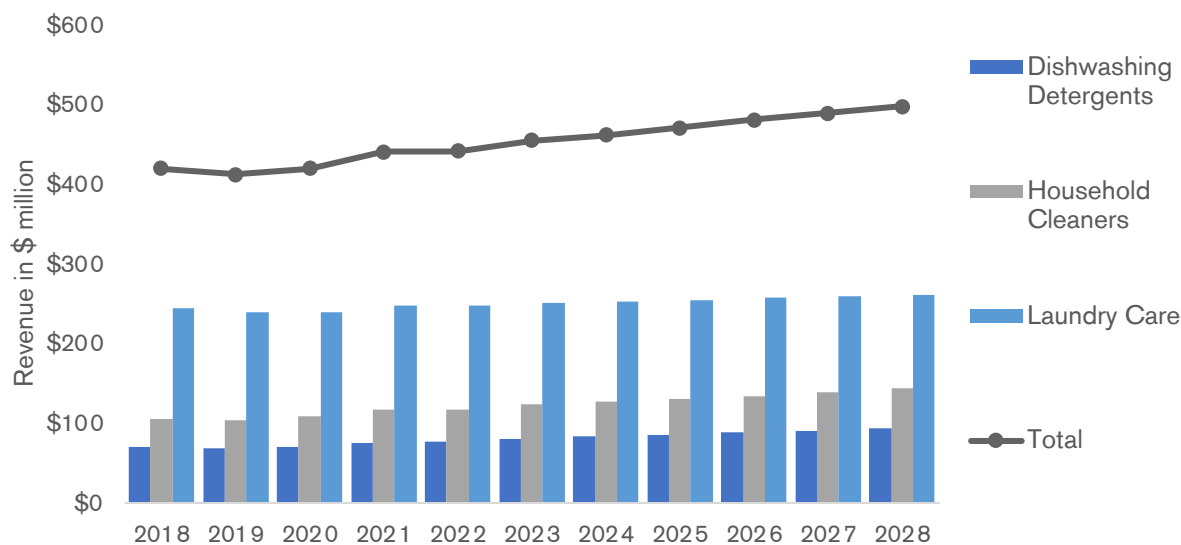


Chart 17 UAE cleaning products revenue in \$ million, 2018 to 2022

²⁸ IMF. (2023). IMF Country Reports: United Arab Emirates.

²⁹ Ibid.

³⁰ Statista. (2024). Home & Laundry Care - UAE | Statista Market Forecast. Polishes, room scents and insecticides have been excluded from total revenue estimates. [online] Available at: <https://www.statista.com/outlook/cmo/home-laundry-care/united-arab-emirates#revenue%20>



Total ARPC in the United Arab Emirates is projected to increase from \$46 in 2018 to \$50.5 in 2028. Average spend in 2024 is estimated at \$48.

The laundry care market leads the household cleaning category, with average revenue per capita valued at approximately \$26.40 in 2024, and which is expected to remain stable throughout the period. Household cleaners and dishwashing detergent sales are respectively estimated at \$13.20 and \$8.60 in 2024 approximately.³¹

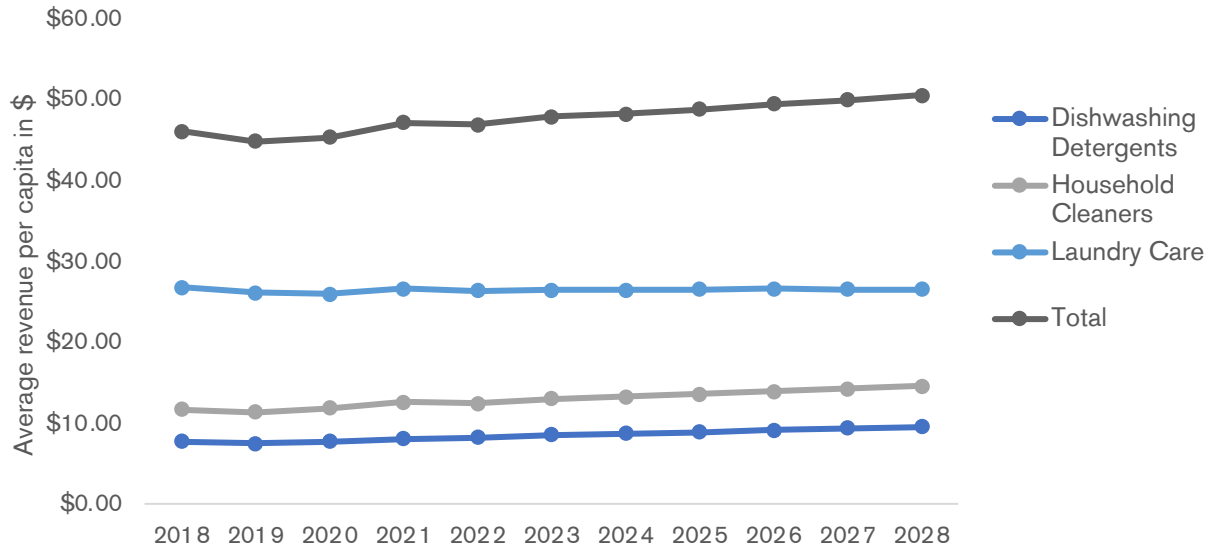


Chart 18 UAE cleaning products revenue average per capita, in \$, 2018 to 2028

United Arab Emirates cleaning products

The United Arab Emirates has seen a steady rise in cleaning product imports, reaching \$622 million in 2022, reflecting a growth of over 35% compared to \$459 million in 2018. Saudi Arabia remained the top supplier, exceeding \$200 million in imports every year and peaking at \$230 million in 2022. India nearly tripled its shipment values, reaching \$63 million in 2022, from \$25 million in 2018. China also exhibited a significant increase, with shipments more than doubling trade over the same timeframe, reaching \$39 million in 2022, from \$16 million in 2018. The United States maintained a steady presence, with import values fluctuating slightly between \$33 million and \$35 million. Products from Poland exhibited an upward trend, reaching \$37 million in 2022 from \$15 million in 2018. Jordan's contribution, though relatively small, witnessed a notable jump to \$3.6 million in 2022 from \$831,000 in 2018.³²

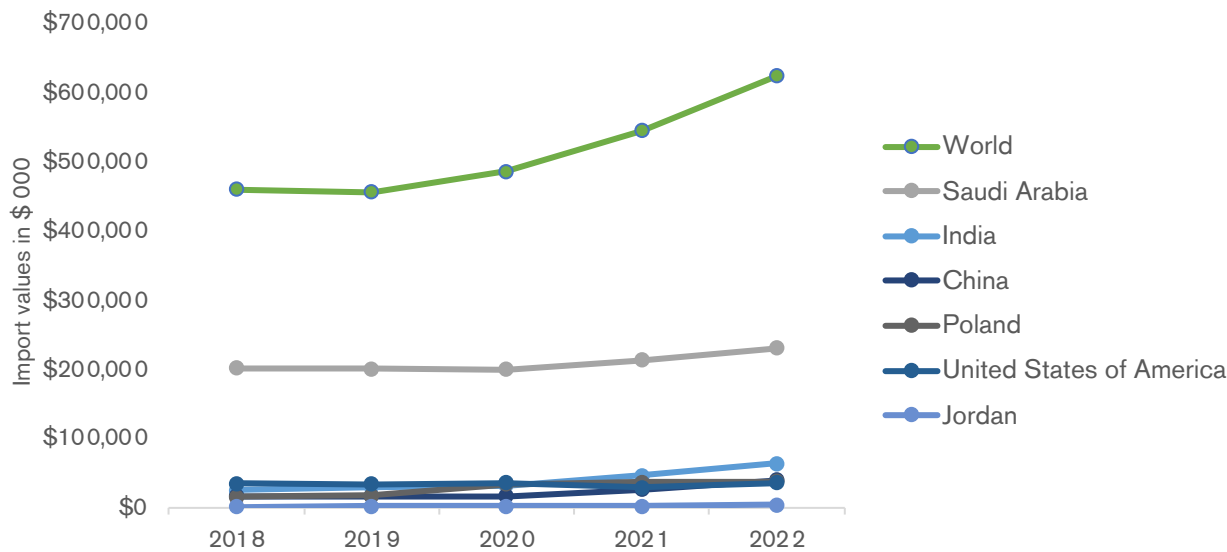


Chart 19 UAE cleaning products import values, 2018 to 2022

³¹ Statista. (2024). Home & Laundry Care - UAE | Statista Market Forecast. Polishes, room scents and insecticides have been excluded from total revenue estimates. [online] Available at: <https://www.statista.com/outlook/cmo/home-laundry-care/uae#revenue%20>
https://www.trademap.org/Country_SelProductCountry_TS.aspx?nvpm=1%7c784%7c%7c%7c%7c3402%7c%7c%7c4%7c1%7c1%7c1%7c2%7c1%7c2%7c1%7c1%7c1
³² International Trade Centre (ITC) (2022). Trade Map - List of supplying markets for a product imported by United Arab Emirates Arabia (3402 Organic surface-active agents (excl. soap); surface-active preparations, washing preparations, ...). [online] Available at: https://www.trademap.org/Country_SelProductCountry_TS.aspx?nvpm=1%7c784%7c%7c%7c%7c3402%7c%7c%7c4%7c1%7c1%7c1%7c2%7c1%7c2%7c1%7c1%7c1



The United Arab Emirates' average category import prices remained at around the \$1,800 per ton level between 2018 and 2020.³³ Poland remained the most expensive source, ranging from \$4,925 per ton in 2018 to \$5,333 per ton in 2022, likely due to specialised products or transport costs. China offered the most competitive prices, achieving \$1,182 per ton in 2021. Correspondingly, the import value of products from Jordan fell from \$1,659 per ton in 2018 to \$1,161 per ton in 2022.³⁴

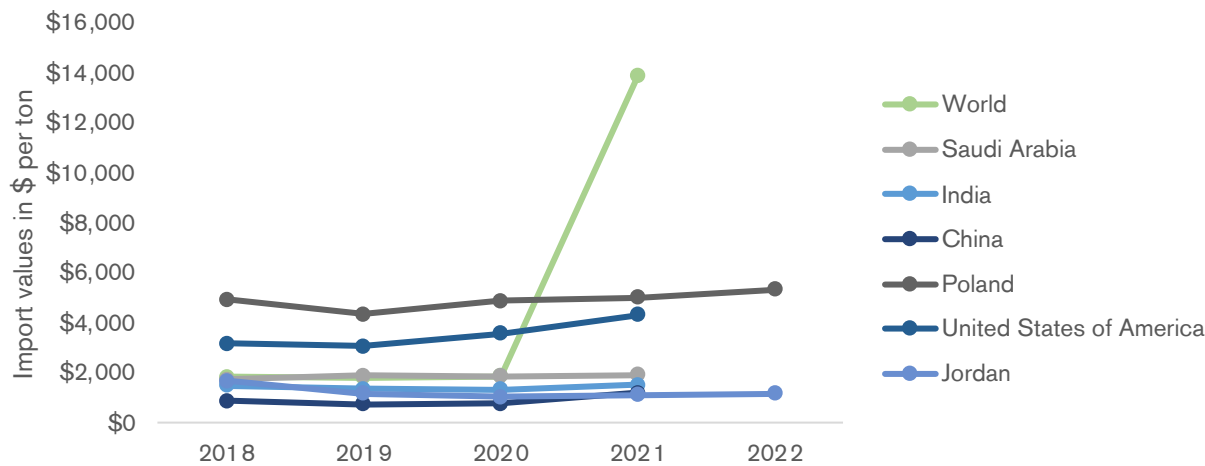


Chart 20 UAE cleaning products imports from main supplying countries, in \$ per ton (2018-2022)

United Arab Emirates cleaning products imports from Jordan

With regard to United Arab Emirates category shipments from Jordan, HS 340220 (encompassing various cleaning products), saw registered no trade in 2022.³⁵ Previously, this category held the top spot with exports valued at \$657,000 in 2018 and reaching \$964,000 in 2020. Conversely, HS 340290 (surface-active preparations including auxiliary washing preparations) displayed consistent growth, culminating in a significant jump to \$2.9 million in 2022 and becoming Jordan's leading export category to the UAE. Interestingly, a new category, HS 340250, emerged in 2022 with an export value of \$3.6 million, suggesting a potential expansion in Jordan's cleaning product offerings to the country. Other exports with minimal presence were observed in other categories like HS 340219 (organic surface-active agents) and HS 340213 (non-ionic organic surface-active agents).

³³ A United Arab Emirates' average HS 3402 import price of \$13,915 in 2021, requires further validation as it appears an outlier. Not included as such.

³⁴ ITC (2022). Trade Map - List of supplying markets for a product imported by United Arab Emirates. [online] Trademap.org. Available at: https://www.trademap.org/Country_SelProductCountry_TS.aspx?nvpm=1%7c784%7c%7c%7c3402%7c%7c%7c4%7c1%7c1%7c2%7c1%7c2%7c3%7c1%7c1 [Accessed 21 Apr. 2024].

³⁵ While this could indicate a genuine decline in exports, it is also possible that trade data for this category in 2022 is incomplete and has not been reported yet.

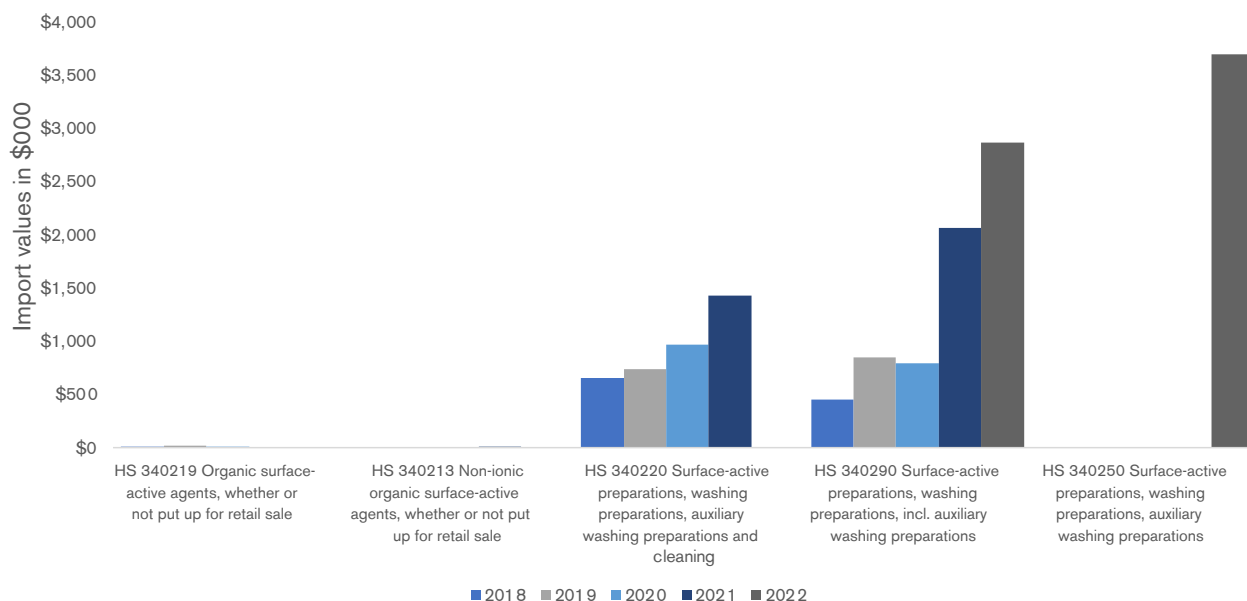


Chart 21 United Arab Emirates cleaning products imports from Jordan

Trade Agreements between United Arab Emirates and Jordan

Greater Arab Free Trade Area (GAFTA), 1997. The United Arab Emirates and Jordan are members of GAFTA, which was established under the umbrella of the Arab League. The agreement aims to create a free trade area among Arab countries by reducing and eliminating tariffs and trade barriers among member states. GAFTA includes 18 Arab countries and promotes increased trade and economic integration in the region

Industrial Partnership for Sustainable Economic Growth, 2022. Though not an agreement, this initiative has overseen deals of more than \$2 billion, and involves the UAE, Egypt, Bahrain, and Jordan. It aims to foster industrial cooperation in sectors such as agriculture, fertilisers, food, minerals, petrochemicals, pharmaceuticals and textiles.³⁶

³⁶ opens 3rd meeting of Higher Committee of Industrial Partnership in Amman:[online] Available at: <https://jordantimes.com/news/local/pm-opens-3rd-meeting-higher-committee-industrial-partnership-amman>



United Arab Emirates PESTEL analysis

Politics

The United Arab Emirates is a federal absolute monarchy composed of seven emirates, each ruled by its own hereditary Sheikh. These Sheikhs collectively form the Federal Supreme Council, with the ruler of Abu Dhabi traditionally serving as the President of the UAE.

The UAE and Jordan maintain strong political relations characterised by mutual cooperation and support on various regional and international issues. Both countries collaborate closely within the framework of regional and international organisations to promote stability and development in the Middle East.

Economics

The United Arab Emirates benefits from a diversified economy, with the non-oil sector contributing around 70% to its GDP, recorded at \$507 billion in 2022. Key sectors include tourism, aviation, real estate, and financial services.

The Emirates is among Jordan's most significant investors. A reported \$22.5 billion in investment and financing in the 10 years to 2023, was provided by the Gulf state to the Hashemite Kingdom.

Social

The population of the United Arab Emirates was registered at 9.4 million in 2022, with expatriates making up about 90% of the total population. The official language is Arabic, and Islam is the state religion. The country is known for its high standards of living and multicultural society.

The government has made significant investments in education and healthcare, aiming to become a knowledge-based economy. In addition to a high literacy rate, the country offers comprehensive healthcare services to its residents.

Technology

The Emirates is a leader in technological innovation, with a significant focus on digital transformation, smart cities, renewable energy, and developed infrastructures. In 2023, the country was ranked 37th in the UNCTAD Frontier Technologies Readiness Index, based on research and development (R&D) and industry activity, ICT deployment, skills, and access to finance.

The UAE has also made significant advances in space, with its astronauts joining International Space Station missions and its Hope probe exploring Mars' atmosphere.

Environment

The country is committed to sustainability and environmental protection, with goals for renewable energy and green initiatives. Projects like Masdar City and the UAE Energy Strategy 2050 aim to reduce carbon emissions and promote sustainable development.

Environmental challenges include water scarcity, high energy and water consumption, and desertification. The government is actively working on water conservation, waste management, and the development of renewable energy sources.

Legal

The UAE has a well-developed legal framework that supports business operations and protects investor interests. The country has implemented various laws to enhance corporate governance, intellectual property protection, and anti-money laundering measures.

The Emirates has reformed its labour laws to improve working conditions and protect workers' rights. The introduction of the Wage Protection System (WPS) and various labour mobility initiatives are part of these efforts.



United Arab Emirates cleaning products suppliers and distributors

Fayfa Chemicals Factory.: Fayfa Chemicals Factory LLC is a chemical manufacturing company based in the United Arab Emirates. They specialize in the production and distribution of a wide range of cleaning and hygiene products, including detergents, disinfectants, and personal care items.

Website: <https://www.fayfachemicals.com/>

Chemex Chemical and Hygiene Products.: The company operates as distributors in the United Arab Emirates (UAE). They provide a comprehensive range of cleaning and hygiene products across various industries, including facility management, restaurants, manufacturing, and public area maintenance.

Website: <https://chemex-me.com/>

Al Mas Cleaning Mat Tr Sole Proprietorship LLC.: A reputable company in the UAE specializing in providing diverse cleaning and hygiene products, including garbage bins, sanitizers, chemicals, and more.

Website: <https://almascmt.com/>

RSAS TRADING.: A supplier of janitorial, cleaning, detergent, dispensing, and auto care solutions.

Website: <https://rsastrading.com/>

Lulu Group International. Headquartered in Abu Dhabi, has a significant presence in the United Arab Emirates (UAE) and operates more than 175 stores across the country. These stores are standalone malls or located within popular shopping centers.

Website: <https://www.lulugroupinternational.com/>

Exhibitions and trade fairs in the United Arab Emirates

Dates	Exhibition name	City	Country	Website
26 to 29 November 2024	Big 5 Global	Dubai	UAE	https://www.big5global.com/



Recommendations



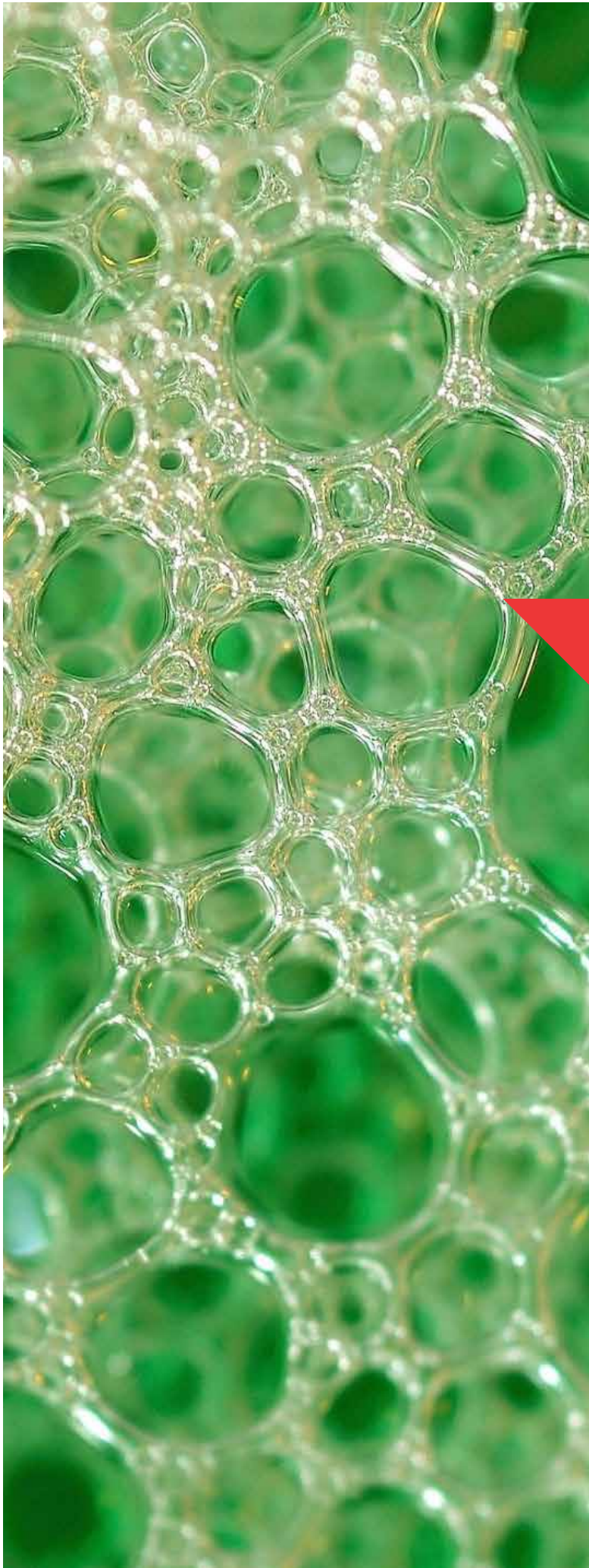
Recommendations in summary

The United States, the Kingdom of Saudi Arabia, and the United Arab Emirates present a significant opportunity for Jordanian cleaning product manufacturers. Despite a large and potentially lucrative US market with cleaning product imports nearly doubling in value from \$1.29 billion in 2018 to \$2.05 billion in 2022 (reflecting a CAGR of 8.3%), Jordanian manufacturers must navigate strict regulations. Jordan, however, benefits from a free trade agreement here.

Saudi Arabia's robust economy with projected growth exceeding 4.5% in 2024, and cultural ties to Jordan make it attractive, with cleaning product imports steadily increasing from \$331.7 million in 2018 to \$405.6 million in 2022, while Jordan's contribution also grew to \$39.5 million in 2022, from \$18.5 million in 2018.

The United Arab Emirates' import market has seen significant increases, reaching \$622 million in 2022 up from \$459 million in 2018, yet Jordanian manufacturers face competition from established suppliers like Saudi Arabia whose contribution peaked at \$230 million, India reaching \$63 million, and China shipping goods valued at \$39 million in 2022.

To succeed, Jordanian companies should conduct in-depth market research, prioritise compliance regulations, leverage free trade agreements and cultural understanding in marketing, and develop competitive pricing strategies.



Reference information



Priority markets tariff and non-tariff barriers³⁷

United States

Tariffs

For HS code 3402 (cleaning products), Jordan enjoys a preferential tariff of 0%. This means there are no import duties for Jordanian cleaning products. However, the most favoured nation (MFN) duty is 6.5%.

General requirements

- The Toxic Substances Control Act (TSCA) regulates chemicals used in cleaning products. Importers must follow TSCA guidelines and obtain proper documentation, including TSCA certifications, to clear customs efficiently.
- When importing cleaning products into the United States, ensure compliance with safety and environmental regulations, including proper labelling, ingredient disclosure, and adherence to relevant agency guidelines. Additionally, obtain the appropriate customs bond (either a single-entry bond or a continuous customs bond) to facilitate smooth customs clearance and compliance with U.S. Customs and Border Protection requirements.
- Disinfectants (such as those on EPA's List N) must be registered with the Environmental Protection Agency (EPA) before importation, regardless of whether they are registered in another country.
- Consider partnering with a customs broker to navigate the import process smoothly. They can help you with paperwork, compliance, and customs clearance².

Additional detail

Further detail on USA's import requirements can be found in the following references:

USA Customs Clearance. How to Import Cleaning Product

Link: <https://usacustomsclearance.com/process/how-to-import-cleaning-products/>

USA Customs Clearance. Importing Chemicals Into The US: TSCA Compliance and More

Link: <https://usacustomsclearance.com/process/importing-chemicals-into-the-us/>

ICE Global Transport. Navigating Customs Bonds: A Primer for Importers

Link: <https://www.icetransport.com/blog/navigating-customs-bonds-a-primer-for-importers>

ISF Customs Broker. Customs Clearance

Link: <https://isfcustomsbroker.com/customs-clearing/>

ITC Market Access Map

Link: <https://www.macmap.org/>

Global Trade Helpdesk

Link: <https://globaltradehelpdesk.org/en>

³⁷ In respect to the identification of tariff and non-tariff barrier rules for import, the following section details requirements for HS 3808, where Jordan's major exports are classified.



Saudi Arabia

Tariffs

For HS code 3402 (cleaning products), Jordan enjoys a preferential tariff of 0%. This means there are no import duties for Jordanian cleaning products. However, the most favoured nation (MFN) duty is 6.5%.

General requirements

- Importers should have a valid commercial registration number.
- Payment details, including bank name, payment date, and reference number, must be stated on the customs declaration.
- Importers must complete clearing procedures through the Fasah platform at least 48 hours before the shipment's arrival at the port of entry.
- Some goods require an IECEE certificate. Ensure that your cleaning products comply with this requirement if applicable.
- The GSO 2555 General Safety Requirements of Household Detergents outlines essential safety requirements for household detergents in KSA, and compliance with this standard is crucial for importing detergents.
- Nearly all products exported to KSA must be accompanied by a SASO Certificate of Conformity (COC).
- The SASO CoC ensures that the imported goods meet Saudi standards and comply with safety regulations.
- Essential Label Information. The detergent label should include:
 - Product Name: Clearly state the name of the detergent.
 - Ingredients: List all ingredients used in the product.
 - Usage Instructions: Provide clear instructions for use.
 - Precautions: Highlight any safety precautions or warnings.
 - Manufacturer Information: Include details about the manufacturer or supplier.
 - Batch/Production Date: Specify the production date or batch number.
 - Language: Labels should be in Arabic (as per the official regulation).

Additional detail

Further detail on Saudi Arabia import requirements can be found in the following references:

Zakat, Tax and Customs Authority. Import Instructions

Link: https://zatca.gov.sa/en/RulesRegulations/Taxes/Pages/customs_bussiness/import_pages/Import-Instructions.aspx

US International Trade Administration. Saudi Arabia - Country Commercial Guide

Link: <https://www.trade.gov/country-commercial-guides/saudi-arabia-import-requirements-and-documentation>

Fasah

Link: <https://www.fasah.sa/trade/home/en/index.html>

GCC Standardization Organization. General Safety Requirements of Household Detergents

Link: <https://www.gso.org.sa/store/standards/GSO:780795/file/22872/preview>

Saudi Standards, Metrology and Quality Organization (SASO). Technical Regulations for Detergents

Link: https://www.saso.gov.sa/en/Laws-And-Regulations/Technical_regulations/Documents/TR%20-%20Detergents.pdf

Export2Gulf. SASO Certificate of Conformity Saudi Arabia

Link: <https://www.export2gulf.com/saso-certificate-coc/>

ITC Market Access Map

Link: <https://www.macmap.org/>

Global Trade Helpdesk

Link: <https://globaltradehelpdesk.org/en>



The United Arab Emirates

Tariffs

For HS code 3402 (cleaning products), Jordan enjoys a preferential tariff of 0%. This means there are no import duties for Jordanian cleaning products. However, the most favoured nation (MFN) duty is 5%.

General requirements

When importing cleaning products into the United Arab Emirates (UAE), it is essential to adhere to specific labelling requirements. Here are the key points to consider:

- The GSO 2555 General Safety Requirements of Household Detergents outlines essential safety requirements for household detergents in the UAE, and compliance with this standard is crucial for importing detergents.
- Key documents needed for product registration include:
 - Free Sale Certificate (FSC): Demonstrates that the product is freely sold in the country of origin.
 - Ingredient Data Sheet (IDS): Provides details about the product's composition.
 - Laboratory Test Report: Validates product safety and efficacy.
 - Safety Data Sheet (SDS): Contains information on handling, storage, and emergency procedures.
 - Safety Assessment Report/Study: Assesses the safety of the product.
- Language Requirements:
 - Labels must be in Arabic only or Arabic/English.
 - Arabic stickers are accepted.
- Mandatory Information on Labels:
 - The following information is required in Arabic, either as part of the packaging or as an affixed label:
 - Product and brand names
 - Lot identification/lot number
 - Production and expiry dates

Additional detail

Further detail on the United Arab Emirates' import requirements can be found in the following references:

Dubai Municipality Health and Safety Department. Technical Guidelines for Detergents

Link:

https://www.dm.gov.ae/wp-content/uploads/2021/01/DM-HSD-GU30-TGD2_Technical-Guidelines-for-Detergents_V1.1.pdf

US International Trade Administration. United Arab Emirates - Country Commercial Guide

Link: <https://www.trade.gov/country-commercial-guides/united-arab-emirates-import-requirements-and-documentation>

GCC Standardization Organization. General Safety Requirements of Household Detergents

Link: <https://www.gso.org.sa/store/standards/GSO:780795/file/22872/preview>

ITC Market Access Map

Link: <https://www.macmap.org/>

Global Trade Helpdesk

Link: <https://globaltradehelpdesk.org/en>



Methodology

The study employs desktop research and concentrates on the underlying product, its capacity, supply, demand globally and in particular priority markets. In addition, the study covers export and import statistics, trade barriers and import requirements. The objective is to give insight on merchandise trade dynamics in the Jordanian context.

Priority Markets Selection Criteria

The selection of priority markets is based on a comprehensive set of criteria:

- **Annual Imported Quantities:** Evaluating the volume of imports to gauge market size.
- **Growth Rate in Quantities:** Assessing the rate of growth to identify expanding markets.
- **Market Concentration:** Analyzing the distribution of market share among competitors.
- **Export Potential:** Determining the potential for export between Jordan and the target market.
- **Tariff and Non-Tariff Barriers:** Considering the impact of trade barriers on market entry.

Additionally, all financial figures are conducted in US dollars.

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