

Building Care Chemicals Market Size, Share & Trends Analysis Report By Product (Power Cleaners, Toilet Bowl Cleaners), By End User (Healthcare, Food Service, Hotels & Hospitality), By Supply Type, By Type, By Enterprise Size, By Region, And Segment Forecasts, 2026 - 2033

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Abstracts

Building Care Chemicals Market Summary

The global building care chemicals market size was estimated at USD 17.05 billion in 2025 and is projected to reach USD 25.99 billion by 2033, growing at a CAGR of 5.5% from 2026 to 2033. The market is undergoing rapid change, driven by rising hygiene standards, sustainability mandates, and the expansion of institutional infrastructure across healthcare, hospitality, and commercial real estate.

Post-pandemic sanitation protocols continue to influence purchasing cycles, particularly for high-frequency touchpoint cleaning solutions, while regulatory pressure around chemical safety and environmental impact is reshaping product portfolios. At the same time, volatility in raw material prices, especially surfactants and petrochemical derivatives, remains a constraint for manufacturers. Rising labor costs in facility management are also driving demand for high-efficiency, concentrated, and automated cleaning chemical systems that balance cost optimization with performance requirements.

One prominent driver for the building care chemicals industry is the institutionalization of advanced hygiene practices across healthcare, aviation, and corporate offices. Governments and health authorities have formalized cleaning protocols, creating

sustained demand for disinfectants and specialty cleaners. What began as a pandemic-led response has now become a long-term facility management practice. Cleaning frequencies have increased significantly. Multiple daily disinfections of high-touch surfaces are now standard across offices, healthcare facilities, and public infrastructure. According to the Building Service Contractors Association International, around 37% of customers now prioritize hygiene in choosing cleaning service providers. Nearly 59% of facilities outsource cleaning operations to specialized contractors. This outsourcing trend is critical as it consolidates purchasing power among large service providers who demand certified, high-performance chemicals at scale. In the U.S. alone, the commercial cleaning industry revenues are supported by over 3 million cleaning professionals. This highlights the scale of recurring chemical consumption embedded in service contracts.

At the same time, the market is undergoing a fundamental transition toward sustainable and bio-based chemistry, driven by regulation rather than voluntary adoption. The United States Environmental Protection Agency updated its Safer Choice and Design for the Environment standards in 2024, expanding certification requirements for cleaning products and even recognizing service providers that exclusively use compliant formulations. This has made eco-certified products a prerequisite in many institutional tenders. Companies such as The Clorox Company and Henkel have been recognized under these programs, reflecting the industry-wide pivot. On the innovation front, BASF introduced biomass-balanced ingredients in 2024 that reduce carbon footprint without compromising performance. Bio-based surfactants such as sophorolipids and rhamnolipids are gaining traction, offering up to ~50% lower greenhouse gas emissions compared to petrochemical alternatives. This shift directly influences procurement eligibility, making sustainability a non-negotiable requirement for market participation.

Beyond formulation, innovation in product formats is emerging as a key competitive differentiator. The move toward concentrated, pre-portioned, and solid-format chemicals is reshaping how cleaning solutions are stored, transported, and used. In 2025, Ecolab launched its ReadyDose system, a tablet-based solution that reduces plastic packaging by nearly 99% and significantly lowers storage requirements. Similarly, Solenis strengthened its position in this space through the 2024 acquisition of Aqua ChemPacs, enabling on-site dilution using dissolvable pods. These innovations address both sustainability and operational efficiency while minimizing dosing errors. At the same time, companies like Essity (through its Tork brand) are integrating smart dispensing systems, highlighting a broader shift toward bundled solutions that combine chemicals, dispensing systems, and performance monitoring.

Looking at demand fundamentals, the expansion of global commercial infrastructure remains a powerful long-term growth driver. Rapid urbanization across Asia-Pacific, the Middle East, and Latin America is continuously adding new commercial floor space, each of which requires ongoing maintenance and cleaning chemicals. Asia-Pacific represents a significant share of the global industrial cleaning chemicals market, supported by large-scale infrastructure investments across the region. In India, government-backed initiatives such as the National Infrastructure Pipeline, with an outlay of around USD 1.4 trillion (as reported by the Ministry of Finance), are driving the expansion of commercial and institutional infrastructure, thereby generating sustained downstream demand for building care chemicals. Similarly, in China, policy support under frameworks such as the 14th Five-Year Plan, highlighted by the National Bureau of Statistics of China, continues to promote growth in the healthcare, food processing, and hospitality sectors, thereby indirectly strengthening demand for industrial cleaning solutions.

Furthermore, the integration of digital technologies is redefining how cleaning programs are designed and executed. IoT-enabled systems, data analytics, and automation are enabling demand-based cleaning rather than fixed schedules. For instance, Tork's Vision Cleaning platform has demonstrated up to a 75% reduction in occupant complaints and a 68% improvement in operational efficiency, according to 2025 industry disclosures. Organizations such as ISSA have identified AI, robotics, and smart sensors as core industry priorities moving forward. This shift toward data-driven cleaning is increasing the need for precisely formulated chemicals compatible with automated systems that deliver consistent results under controlled dosing conditions. As a result, the market is transitioning from a volume-driven model to a performance- and solutions-driven ecosystem, where innovation, compliance, and integration define competitive advantages.

Global Building Care Chemicals Market Report Segmentation

This report forecasts revenue growth at the global, regional & country levels and provides an analysis of the latest trends and opportunities in each of the sub-segments from 2021 to 2033. For this study, Grand View Research has segmented the building care chemicals market report based on product, end user, supply type, type, enterprise type, and region:

Product Outlook (Revenue, USD Million, 2021 - 2033)

Surface and Above Floor Cleaners

Toilet Bowl Cleaners

Window and Glass Cleaners

Specialty Surface Cleaners (For Upholstery, Furniture, etc.)

Drain and Sink Cleaners

Power Cleaners

Washroom Cleaners

Others (Toilet Seat Sanitizer, Rim Cleaner, etc.)

End User Outlook (Revenue, USD Million, 2021 - 2033)

Healthcare

Hospitals

Senior Living and Retirement Communities

Medical Centers (Life Science, Biotech, Research Centers)

Ambulatory Surgical Centers

Doctor's Offices and Clinics

Others (Small Rehab Centers, etc.)

Food Service

Restaurants & Beverage Outlets

Cafés, Bars, and Pubs

Catering Establishments

Informal and Mobile Food Service Establishments

Hotels & Hospitality

Hotels & Resorts

Non-Hotel & Alternative Hospitality Accommodation

Leisure and Entertainment Parks

Event Venues and Recreational Facilities

Industrial and Manufacturing Facilities

Food Processing and Beverage Facilities

Pharmaceutical Manufacturing

Defense & Aerospace Facilities

Building Service Contractors and Facility Management Companies

Retail & Public-Facing Commercial Spaces

Educational Institutions

Transportation and Travel

Airports

Railway Stations

Bus Terminals and Depots

Metro and Subway Systems

Ports and Harbors

Offices and Business Parks

Government Offices and Buildings

Others (Religious Institutions, etc.)

Supply Type Outlook (Revenue, USD Million, 2021 - 2033)

Contract

Service-Led Contract Holders

Building Service Contractors (BSCs)

Facilities Management (FM) Companies

End-User-Led Contract Holders

Group Purchasing Organizations (GPOs)

Non-contract

Type Outlook (Revenue, USD Million, 2021 - 2033)

Contract

Product-Only Supply Contracts

Service Inclusive Contracts

Equipment Inclusive Supply Contracts

Training & Compliance Inclusive Contracts

Fully Integrated Hygiene-as-a-Service (HaaS)/Performance-Based

Non-contract

Enterprise Size Outlook (Revenue, USD Million, 2021 - 2033)

Small

Medium

Large

Regional Outlook (Revenue, USD Million, 2021 - 2033)

North America

U.S.

Canada

Mexico

Europe

UK

Germany

France

Italy

Spain

Asia Pacific

China

India

Japan

South Korea

Australia & New Zealand

Central & South America

Brazil

Argentina

Middle East & Africa

South Africa

Saudi Arabia

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