

Cleaner & Degreaser After Market ? Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Vehicle Type (Passenger Cars, Light Commercial Vehicles and Heavy Commercial Vehicle), By Repair Service (Original Equipment Supplier (OES) and Independent After-Market ? Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented (IAM), By Supply Mode (Aerosol Can, Drum, Spray Bottle, Jug and Pail), By Type (Water-Based and Solvent-Based), By Region & Competition, 2021-2031F

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Abstracts

The Global Cleaner & Degreaser After Market is projected to expand from a valuation of USD 45.84 billion in 2025 to USD 51.96 billion by 2031, reflecting a compound annual growth rate of 2.11%. This aftermarket sector comprises specialized chemical formulations engineered to remove persistent contaminants, including oil, grease, and sludge, from industrial surfaces, automotive components, and machinery during repair and maintenance. Growth in this domain is fundamentally bolstered by the rising average age of the global vehicle fleet, which demands frequent heavy-duty servicing, alongside strict sanitation protocols required within manufacturing sectors to maintain operational efficiency. Consequently, these operational necessities drive a consistent demand for high-performance cleaning agents that exists independently of temporary lifestyle trends or shifting consumer preferences.

One significant obstacle hindering faster market growth is the increasingly stringent regulatory environment regarding volatile organic compounds, which compels

manufacturers to direct substantial resources toward reformulating solvent-based products to ensure compliance. The scale of this industry is considerable; according to the International Association for Soaps, Detergents and Maintenance Products, the professional cleaning and hygiene sector achieved a market value of \$9.8 billion in 2024. This figure underscores the substantial economic magnitude of the technical cleaning industry as it strives to navigate the intricate balance between adhering to environmental regulations and maintaining product efficacy.

Market Driver

The expansion of the global automotive fleet, coupled with the rising average age of vehicles, serves as a primary catalyst for the Global Cleaner & Degreaser After Market. As vehicles stay in service for longer periods, their engines and mechanical parts accumulate thick layers of carbon deposits, sludge, and grease, necessitating powerful chemical treatments during repairs and overhauls. This aging trend requires the regular use of heavy-duty degreasers to restore functionality and extend the life of critical systems, a need highlighted by the European Automobile Manufacturers' Association's September 2024 report, which indicated that the average age of passenger cars in the European Union has reached 12.3 years. Such an aging demographic fosters a durable reliance on high-performance aftermarket cleaning solutions that are fundamentally different from routine cosmetic washing.

Concurrently, the market is being transformed by a growing demand for eco-friendly and bio-based formulations, driven by strict workplace safety protocols and environmental regulations. Industrial operators are progressively shifting away from hazardous chlorinated solvents in favor of biodegradable alternatives that lower volatile organic compound emissions while maintaining cleaning power. According to BASF's September 2024 'Responsible Sourcing Report', the company's Care Chemicals division noted that 90 percent of the raw materials in its bioactives unit were bio-based, a transition supported by the sector's significant economic impact; the American Cleaning Institute's October 2024 report valued the U.S. cleaning product supply chain at \$60 billion. These elements drive innovation in green chemistry, compelling manufacturers to align regulatory compliance with the stringent cleaning capabilities required for modern machinery.

Market Challenge

The increasingly strict landscape of environmental regulations concerning volatile organic compounds (VOCs) poses a significant obstacle to the progression of the

Global Cleaner and Degreaser Aftermarket. The enforcement of rigorous emission limits forces manufacturers to fundamentally modify product compositions, necessitating the diversion of substantial capital toward reformulating established solvent-based offerings. This obligatory focus on regulatory compliance requires extended testing periods and product recertification, which effectively slows the commercial release of new cleaning solutions. Rather than investing in capacity increases or market expansion, companies are compelled to prioritize adherence to changing standards, thereby delaying revenue generation from new product introductions.

This compliance-centric shift demands massive financial investment in research to discover effective, low-VOC alternatives that do not sacrifice cleaning performance, a commitment reflected in broader industry investment trends. As reported by the European Chemical Industry Council (Cefic), Research & Innovation (R&I) spending within the EU27 chemical industry amounted to ?10.4 billion in 2024. Such elevated expenditure highlights the resource strain placed on manufacturers as they innovate within regulatory confines. These high development costs frequently erode profit margins and restrict the capital available for the distribution and marketing efforts essential for driving broader market growth.

Market Trends

The aftermarket is experiencing rapid advancement in specialized EV maintenance cleaners tailored to the specific service needs of electric powertrains. Unlike internal combustion engines that can withstand standard degreasers, electric vehicles require non-corrosive and dielectric formulations to safely sanitize high-voltage cabling and battery compartments without the risk of short circuits. This rise in specialized product innovation correlates directly with the surging number of electric vehicles entering the global fleet, which necessitates technically advanced, non-conductive cleaning agents. According to the International Energy Agency's 'Global EV Outlook 2024' released in April 2024, global electric car sales were projected to reach 17 million units in 2024, establishing a massive, distinct service category requiring these dedicated solutions.

Simultaneously, industrial operators are actively adopting smart automated dispensing solutions to enforce precise dilution ratios and optimize chemical usage. These IoT-enabled systems supersede manual mixing methods, ensuring concentrated degreasers are dispensed accurately to lower environmental footprints and minimize waste in maintenance operations. This technological transition is propelled by the necessity for sustainability compliance and rigorous cost control in large-scale facilities. As noted by Solenis in the January 2024 'Diversey UK Carbon Reduction Plan', the

implementation of advanced dosing control systems for cleaning machinery demonstrated the potential to reduce chemical consumption by up to 75%, underscoring the market's shift toward intelligent infrastructure that maximizes the efficiency of high-performance cleaning chemistries.

Key Market Players

Henkel

3M

Zep Inc.

Ecolab

CRC Industries

WD-40 Company

S. C. Johnson

Clorox Professional

Chemisphere / local formulators

Report Scope

In this report, the Global Cleaner & Degreaser After Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Cleaner & Degreaser After Market, By Vehicle Type

Passenger Cars

Light Commercial Vehicles

Heavy Commercial Vehicle

Cleaner & Degreaser After Market, By Repair Service

Original Equipment Supplier (OES)

Independent After-market (IAM)

Cleaner & Degreaser After Market, By Supply Mode

Aerosol Can

Drum

Spray Bottle

Jug

Pail

Cleaner & Degreaser After Market, By Type

Water-Based

Solvent-Based

Cleaner & Degreaser After Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Cleaner & Degreaser After Market.

Available Customizations:

Global Cleaner & Degreaser After Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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