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Economic and Social Contributions of the US Personal Care Products Industry

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Prepared for

The Personal Care Products Council

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Executive Summary

The personal care products industry includes a wide range of products dedicated to health and beauty, including soaps, perfume, sunscreen, hair and skin care products, cosmetics, and toothpaste. These products are staples of US consumers and are used by all ages. Industry members develop, manufacture, market, and distribute personal care products for use at home and in salons and spas. The industry is composed of three primary segments:

- **Manufacturing**. While globalization has led to the rise of manufacturing abroad, domestic personal care product manufacturing provides the majority of the products for the US market and, furthermore, exports of industry products exceed imports.
- **Distribution.** Wholesalers and retailers distribute personal care products to consumers, either directly to final customers or through service providers. This segment of the industry, which includes employment in department stores and general retailers that sell personal care products, has more than doubled over the last 20 years.
- **Personal care services.** The service segment includes barber shops, beauty salons, and nail salons. Personal care services provide vital opportunities to small businesses and historically disadvantaged groups.

The Personal Care Products Council engaged PwC to quantify the economic and social contributions of the US personal care products industry at the national, state, and congressional district levels. In evaluating the total economic contribution of the US personal care products industry, this report considers three separate channels—direct, indirect, and induced impacts:

1. ***Direct impacts*** are the economic contributions directly attributable to the industry, including the jobs, labor income, and contribution to gross domestic product ("GDP") *within* the personal care products industry.
2. ***Indirect impacts*** are the economic contributions attributable to the activities of upstream suppliers to the industry. Indirect impacts arise from economic activity in other industries resulting from the personal care products industry's purchases of intermediate inputs from those industries.
3. ***Induced impacts*** are the economic contributions attributable to the personal consumption expenditures of employees and business owners in the personal care products industry and its supply chain.

National Economic Contributions

Including direct, indirect, and induced economic activity, in 2013, the personal care products industry was responsible for $236.9 billion in GDP, 3.6 million jobs, $144.3 billion in labor income, and $55.9 billion in tax payments at the federal, state, and local levels. Industry-related employment represents 2.0 percent of total US employment (see **Table E-1**).

Table E-1. Total Contribution of the Personal Care Products Industry to the US Economy, 2013

Item	Direct Impact	Indirect & Induced Impacts	Total Impact	Percent of US Total
Jobs [1]	2,157,610	1,480,230	3,637,840	2.0%
Labor income ($ billions) [2]	$65.0	$79.3	$144.3	1.4%
Contribution to GDP ($ billions)	$96.8	$140.1	$236.9	1.4%
Taxes ($ billions) [3]	$23.3	$32.6	$55.9	n.a.

Source: PwC calculations using data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics, and the IMPLAN modeling system (2013 database).

[1] Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.

[2] Labor income is defined as wages and salaries and benefits as well as proprietors' income.

[3] Includes federal, state, and local government taxes. A consistent set of tabulations of federal, state, and local government tax collections are not yet available for 2013.

Based on government data, the industry directly employs 2.2 million workers, primarily in the service sector (1.6 million jobs). An additional 1.5 million jobs are attributable to indirect and induced economic activity associated with the industry.

As government data likely understate employment in the direct selling segment of the industry, these employment estimates may be conservative. Direct sellers, an important part of the industry's sales force, typically work out of their homes and rely on personal contacts to sell their products. Individuals in the direct selling segment of the industry who are not counted in government data could add another 1.7 million jobs to the total.

Economic Contributions by State

The personal care products industry has widespread economic contributions in all 50 states and the District of Columbia. The states with the largest number of jobs directly and indirectly supported by the personal care products industry are California, Texas, New York, Florida, and Illinois (see **Table E-2**).

As a percentage of total state employment, personal care products industry jobs were highest in New Jersey (3.5%), followed by North Carolina (2.9%), Tennessee (2.6%), Ohio (2.5%), and Illinois (2.5%) (see **Figure E-1**).

Table E-2. Total Economic Contributions of the Personal Care Products Industry, by State, 2013

State	Jobs [1]		Labor Income [2]		Contribution to GDP		Taxes [3]
	Count	Percent of State Total	Millions of Dollars	Percent of State Total	Millions of Dollars	Percent of State Total	Millions of Dollars
California	415,680	1.9%	$17,860	1.3%	$28,995	1.3%	$7,267
Texas	269,180	1.7%	11,125	1.2%	18,296	1.2%	3,873
New York	251,650	2.2%	11,451	1.4%	20,132	1.5%	5,609
Florida	220,470	2.1%	7,378	1.5%	11,750	1.5%	2,793
Illinois	185,610	2.5%	7,590	1.7%	12,011	1.7%	2,953
New Jersey	182,260	3.5%	8,823	2.6%	15,184	2.9%	4,079
Ohio	170,590	2.5%	6,696	1.9%	11,657	2.0%	2,678
North Carolina	161,030	2.9%	6,075	2.2%	11,586	2.5%	2,465
Pennsylvania	157,910	2.1%	6,506	1.6%	10,331	1.6%	2,501
Georgia	126,210	2.3%	4,043	1.4%	6,523	1.4%	1,364
Michigan	108,470	2.0%	3,415	1.3%	5,252	1.2%	1,245
Tennessee	95,100	2.6%	3,584	1.9%	5,718	2.0%	1,301
Virginia	87,780	1.8%	3,617	1.3%	5,926	1.3%	1,343
Maryland	78,080	2.3%	3,173	1.5%	5,588	1.7%	1,328
Indiana	74,640	2.0%	2,567	1.4%	4,579	1.4%	980
All Other	1,053,190	1.6%	40,412	1.2%	63,416	1.1%	14,115
US Total	**3,637,840**	**2.0%**	**$144,314**	**1.4%**	**$236,944**	**1.4%**	**$55,895**

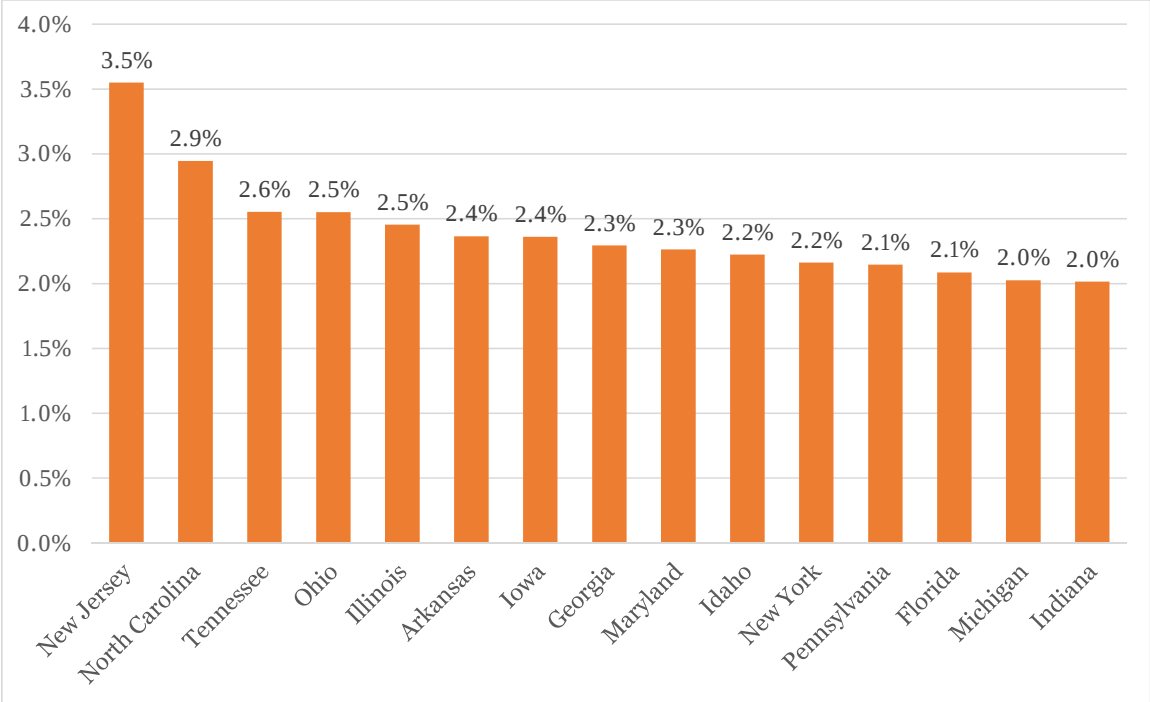
Source: PwC calculations using data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics, and the IMPLAN modeling system (2013 database).

[1] Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.

[2] Labor income is defined as wages and salaries and benefits as well as proprietors' income.

[3] Includes federal, state, and local government taxes.

Figure E-1. Personal Care Products Industry's Total Employment Contribution as a Share of Total State Employment, 2013 [Top 15 States]

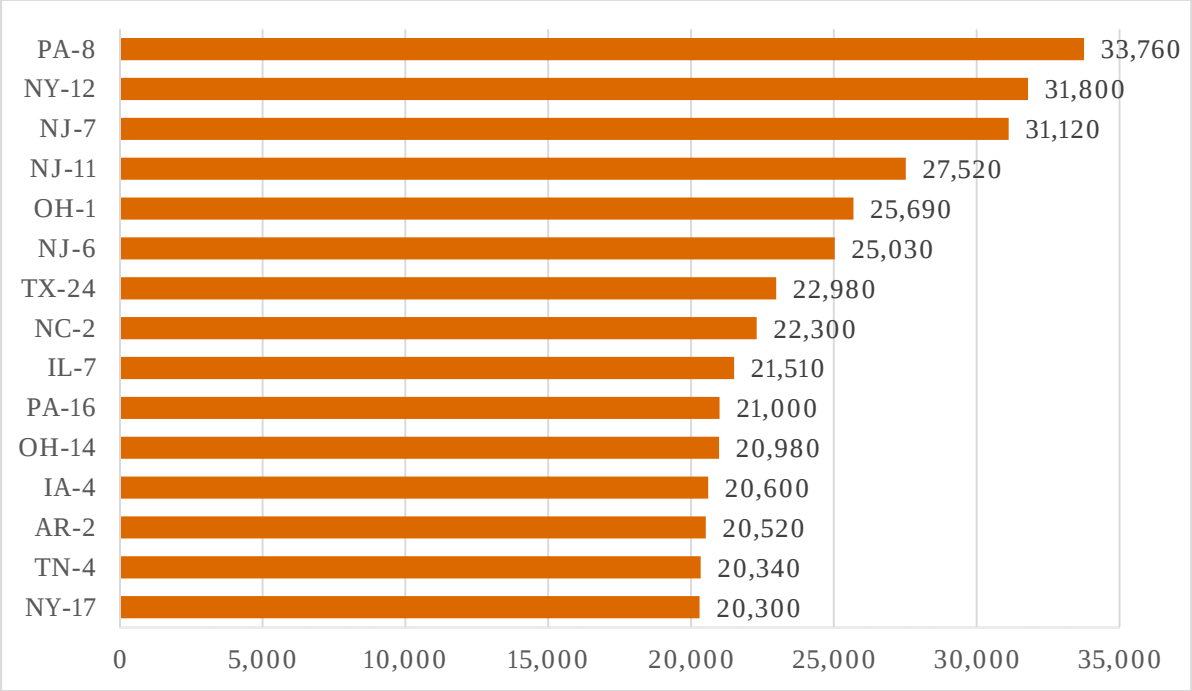


Source: PwC calculations using data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics, and the IMPLAN modeling system (2013 database).

Economic Contributions by Congressional District

At the congressional district level, the personal care products industry's total employment impact, including direct, indirect, and induced jobs, was highest in the 8th district of Pennsylvania (33,760), the 12th district of New York (31,800), the 7th district of New Jersey (31,120), the 11th district of New Jersey (27,520), and the 1st district of Ohio (25,690) (see **Figure E-2**).

Figure E-2. Personal Care Products Industry's Total Employment Contribution in 2013
[Top 15 Congressional Districts]



Source: PwC calculations using data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics, and the IMPLAN modeling system (2013 database).

Other Economic and Social Contributions

The industry also makes important social contributions through charitable contributions, environmental responsibility, opportunities for women and minorities, and promotion of small business formation.

- **International Trade:** Personal care products manufacturers generate a surplus in the balance of trade, with exports of personal care products more than 50 percent higher than imports in 2014. Personal care product manufacturers generate the largest trade surplus relative to the value of domestic shipments of all manufacturing industries.[1]
- **Opportunities for Women:** Compared to the national industry average, the personal care products industry employs a larger percentage of women in both managerial and non-managerial positions and minority women in managerial positions.
- **Opportunities for Small Businesses:** Firms with fewer than 10 employees account for 34 percent of the industry's employment and firms with fewer than 50 employees account for 67 percent. Small businesses in the personal care products industry provide vital opportunities and create new jobs. Personal care products

[1] For purposes of this comparison, all other manufacturing industries are defined using the 3-digit NAICS industries within the manufacturing sector.

companies with fewer than 100 employees accounted for the creation of more than 20,000 jobs nationwide during 2012.

- **Occupations:** The personal care products industry offers a wide range of occupations, including more than 5,700 jobs in science, technology, engineering, and mathematics (STEM). In fact, STEM jobs account for 9 percent of all jobs at personal care products manufacturers.
- **Charitable Contributions:** On average, personal care products manufacturers contribute more of their receipts to charity than other manufacturing sectors. These contributions help improve the communities where the personal care products companies operate.
- **Research and Development:** The rate of growth in R&D spending by personal care products manufacturers exceeded that of other manufacturers between 2002 and 2011. The Personal Care Product Industry now accounts for 1.5 percent of all manufacturing R&D.
- **Environmental Impact:** Relative to 2012, major industry participants increased sales in 2013 without increasing global warming emissions On average, personal care products manufacturers consume less electricity relative to sales than other manufacturers.

Introduction

I. Introduction

The personal care products industry includes a wide range of products dedicated to health and beauty, including perfume, sunscreen, hair and skin care products, cosmetics, and toothpaste. These products are staples of US consumers and are used by all ages. Industry members develop, manufacture, market, and distribute personal care products for use at home and in salons and spas.

The industry is composed of manufacturers, distributors, and service providers:

- **Manufacturing**. While globalization has led to the rise of manufacturing abroad, domestic personal care product manufacturing provides the majority of the products for the US market and, furthermore, exports of industry products exceed imports.
- **Distribution.** Wholesalers and retailers distribute personal care products to consumers, either directly to final customers or through service providers. This segment of the industry, which includes employment in department stores and general retailers that sell personal care product, has more than doubled over the last 20 years.[2]
- **Personal care services.** The service segment includes barber shops, beauty salons, and nail salons. Personal care services provide vital opportunities to small businesses and historically disadvantaged groups.

At each stage of the personal care products supply chain, employment is created, income is earned, value is generated, and taxes are paid. However, the economic contribution is greater than these direct effects. Each stage of the production and delivery process relies on suppliers from other parts of the economy. Payrolls are spent by employees, generating more activity. Additional employment, labor income, value added, and taxes are generated as a result of these indirect and induced activities.

These economic measures provide one perspective on the personal care products industry. The industry makes important social contributions through charitable contributions, environmental responsibility, opportunities for women and minorities, and promotion of small business formation.

The Personal Care Products Council engaged PricewaterhouseCoopers to quantify the economic and social contributions of the industry. In evaluating the total economic contribution of the US personal care products industry, this report considers three separate channels—the direct, indirect, and induced impacts:

1. ***Direct impacts*** are the economic contributions directly attributable to the industry, including the jobs, labor income, and gross domestic product ("GDP") *within* the personal care products industry.
2. ***Indirect impacts*** are the economic contributions attributable to the activities of upstream suppliers to the industry. In other words, indirect impacts arise

[2] In particular, employment in NAICS sector 446120 (Cosmetics, Beauty Supplies, and Perfume Stores) grew by 153 percent between 1990 and 2014.

from economic activity in other industries resulting from the personal care products industry's purchases of intermediate inputs from those industries.

3. ***Induced impacts*** are the economic contributions attributable to the personal consumption expenditures of employees and business owners in the personal care products industry and its supply chain.

The report is organized as follows. **Section II** defines the personal care products industry for purposes of this study. **Section III** estimates the industry's economic contributions at the national, state, and congressional district levels. **Section IV** discusses the industry's other economic and social contributions. Additional detail on the industry's economic contributions are provided at the state and congressional district levels in **Appendix A** and **Appendix B**. The data sources and methodology used to estimate economic impacts are discussed in **Appendix C**.

Industry Definition

II. Industry Definition

For purposes of this report, the personal care products industry is divided into three primary segments: (1) manufacturing, (2) distribution, and (3) personal care services:

- Manufacturing includes development, production, and marketing of personal care products.
- Distribution includes transportation, wholesaling, and retailing of these products. Retail activities include the sale of personal care products in a variety of retail establishments, such as department stores and drug stores.
- Personal care services includes spas, hair and nail salons, and barber shops that utilize personal care products.

The industry can be defined by reference to the North American Industry Classification System (NAICS) used by US government statistical agencies. In particular, the manufacturing segment of the personal care products industry is composed of toilet preparation manufacturing (NAICS 325620) and a portion of the soap and other detergent manufacturing (NAICS 325611) sectors.[3] The personal care services segment is composed of barber shops (NAICS 812111), beauty salons (NAICS 812112), nail salons (NAICS 812113), and a portion of the other personal care services segment (NAICS 812190).[4] The distribution segment includes businesses in the wholesale trade (NAICS 42), retail trade (NAICS 44-45), and transportation and warehousing (NAICS 48-49) sectors that are engaged in the distribution of personal care products from the manufacturer to final consumers.

Table 1 (below) provides estimates of gross output of the personal care products industry by segment. Gross output is a measure of an industry's total sales or receipts, including sales to final consumers and sales to other businesses. Total sales of personal care products and services amounted to $169.3 billion in 2013.

[3] Using data on sales by product line from the *2012 Economic Census*, PwC estimates that 20.5 percent of NAICS sector 325611 is engaged in the manufacture of personal care products.
[4] Based on sales by product line, it is estimated that 21.2 percent of NAICS sector 812199 is engaged in providing services related to the personal care products industry.

Table 1. Gross Output of the Personal Care Products Industry, 2013 ($ billions)

NAICS Code	NAICS Description	Gross Output
Manufacturing		
325611	Soap and other detergent manufacturing	$7.3
325620	Toilet preparation manufacturing	$47.2
	Total personal care products manufacturing	*$54.5*
Distribution		
42	Wholesale trade	$12.2
44-45	Retail trade	$33.2
48	Transportation	$1.8
	Total distribution of personal care products	*$47.2*
Services		
8121	Personal care services	$67.6
	Total personal care services	*$67.6*
Total Personal Care Products Industry		***$169.3***

Source: PwC calculations using data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics, and the IMPLAN modeling system (2013 database).

Economic Contributions

III. Economic Contributions

In 2013, the average US household spent over $600 on personal care products and services.[5] Industry products and services are purchased by individuals of all ages; for example, households led by individuals age 75 and over spent over $490 annually on average. Between 1990 and 2014, employment in the US personal care products industry increased by 43 percent, while total US nonfarm employment increased by 27 percent. Much of the growth in the personal care products industry is attributable to the services segment, where employment increased by 62 percent over this period.[6]

The economic contribution of the personal care products industry can be separated into three components – direct, indirect and induced impacts:

- **Direct Impacts** result from activities directly attributable to the industry, such as the activities of personal care products manufacturers and personal care service providers. Additional direct effects are attributable to the activities of transportation companies, wholesalers, and retailers involved in the distribution of personal care products. Retail sector activity includes sales in a variety of settings, such as department stores, drug stores, and direct sales by individuals.
- **Indirect Impacts** result from the activities of upstream suppliers to the industry. As a part of the production process, manufacturers purchase inputs from their suppliers and those suppliers purchase inputs from other parts of the economy. Similarly, personal care service providers purchase inputs as a part of their operations, such as marketing services, electricity, and office supplies. These upstream activities, whether the production of raw materials by manufacturers or the purchase of advertising by beauty salons, are connected to the personal care products industry.
- **Induced Impacts** result from spending by employees of the personal products care industry and its suppliers. This consumption causes additional economic activity attributable to the personal care products industry.

This study quantifies the direct, indirect, and induced economic contributions of the personal care products industry in terms of jobs, labor income, taxes, and GDP for 2013, the most recent year for which a full, consistent set of data are available. Estimates of these impacts are based on federal government data and the IMPLAN model, which contains industry input-output relationships at the national, state, and congressional district levels.

National Contributions

According to federal government statistics, the personal care products industry directly employed 2.2 million workers in 2013, including both full-time and part-time employees and self-employed individuals. Including indirect and induced impacts, the personal care products industry's total employment contribution to the US economy was 3.6 million jobs, or 2.0 percent of all US employment in 2013 (**Table 2**).

[5] US Bureau of Labor Statistics, "Consumer Expenditures in 2013," Report 1053, February 2015.
[6] Figures based on data from the US Bureau of Economic Analysis for businesses with paid employees. The personal care products industry figures include the manufacturing segment (which declined by 27 percent between 1990 and 2014) and the services segment. It excludes the distribution segment.

Table 2. Total Economic Contribution of the Personal Care Products Industry to the US Economy, 2013
[Dollar Amounts in $ Billions]

Item	Amount	Percent of US Total
Jobs[1]		
Direct	2,157,610	1.2%
Indirect and Induced	1,480,230	0.8%
Total	3,637,840	2.0%
Labor Income[2]		
Direct	$65.0	0.6%
Indirect and Induced	$79.3	0.8%
Total	$144.3	1.4%
Contribution to GDP		
Direct	$96.8	0.6%
Indirect and Induced	$140.1	0.8%
Total	$236.9	1.4%
Taxes[3]		
Direct	$23.3	n.a.
Indirect and Induced	$32.6	n.a.
Total	$55.9	n.a.

Source: PwC calculations using data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics, and the IMPLAN modeling system (2013 database).
(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as wages and salaries and benefits as well as proprietors' income.
(3) Includes federal, state, and local government taxes. A consistent set of tabulations of total federal, state, and local government tax collections from all sources is not yet available for 2013.

The Direct Sellers Association (DSA) estimates that 16.8 million individuals were involved in direct selling in 2013 and that personal care products accounted for more than 15 percent of the total sales by direct sellers.[7] This implies that approximately 2.5 million direct sellers were involved in the sale of personal care products. In contrast, government statistics on the direct selling establishments (NAICS sector 4543) show total employment of approximately 784,000 in 2013, most of whom are independent contractors.[8] While some direct sellers of personal care products may be captured in the distribution and services segment of the personal care products industry, the DSA estimates suggest that the federal government data may undercount the number of direct sellers of personal care products.

Businesses in the personal care products industry paid out $65 billion in labor income in 2013, including wages, salaries and benefits, and proprietors' income. Total labor

[7] See http://www.dsa.org/research/industry-statistics.
[8] US Census Bureau data for NAICS 45439, "Other direct selling establishments", show 682,800 businesses without paid employees and employment of 101,000 in other direct selling establishments with paid employees.

income associated with the personal care products industry -- including direct, indirect, and induced impacts -- amounted to more than $144 billion, or 1.4 percent of total US labor income. Across direct, indirect, and induced employment, labor income averaged approximately $39,670 per job in 2013.

The personal care products industry directly contributed $96.8 billion to GDP in 2013. Including indirect and induced impacts, the industry's total contribution to GDP was $236.9 billion, or 1.4 percent of total US GDP.

Finally, including direct, indirect, and induced economic activity, the industry contributed $55.9 billion in tax payments to federal, state, and local governments in 2013.

Table 3, on the next page, provides detail on the US personal care products industry's total economic contributions by industry segment (manufacturing, distribution, and services). The services segment accounted for the greatest share of economic activity directly or indirectly attributed to the personal care products industry.

The services segment directly accounted for 1.6 million jobs, $42.2 billion in labor income, and $43.5 billion in contribution to GDP. Including direct, indirect, and induced impacts, the services segment accounted for 2.2 million jobs, $76.6 billion in labor income, and $106.6 billion in contribution to GDP. Services represented 62 percent of the personal care products industry's total employment contribution, 53 percent of its total labor income contribution, and 45 percent of its total contribution to GDP.

The distribution segment is the second largest component of the industry. The wholesale, retail, and transportation segments that distribute personal care products directly accounted for 530,060 jobs, $17.7 billion in labor income, and $29.6 billion in contribution to GDP. Including direct, indirect, and induced impacts, the distribution segment accounted for 937,630 jobs, $39.6 billion in labor income, and $67.3 billion in contribution to GDP, representing 26 percent, 27 percent, and 28 percent, respectively, of the industry's total economic contribution. As discussed above, the employment numbers likely understate the number of individuals involved in direct sales of personal care products.

The manufacturing segment of the personal care products industry directly accounted for 63,990 jobs, $5.1 billion in labor income, and $23.8 billion in contribution to GDP. Average labor income in the manufacturing segment was approximately $79,450 in 2013. The manufacturing segment directly and indirectly supported a total of 448,970 jobs, $28.2 billion in labor income, and $63.1 billion in contribution to GDP. Overall, manufacturing was responsible for approximately 12 percent of the industry's total employment contribution, 20 percent of total labor income contribution, and 27 percent of total contribution to GDP.

Table 3. Total Economic Contributions of the Personal Care Products Industry, by Segment, 2013
[Dollar Amounts in $ Millions]

NAICS Code	Originating Industry	Jobs [1]			Labor Income [2]			Contribution to GDP		
		Direct	Indirect and Induced	Total	Direct	Indirect and Induced	Total	Direct	Indirect and Induced	Total
Manufacturing Segment										
325611	Soap and other detergent manufacturing	5,700	45,660	51,360	$522	$2,778	$3,330	$3,028	$4,964	$7,992
325620	Toilet preparation manufacturing	58,290	339,320	397,610	4,562	20,304	24,867	20,741	34,319	55,060
	Total manufacturing	*63,990*	*384,980*	*448,970*	*$5,084*	*$23,083*	*$28,167*	*$23,769*	*$39,283*	*$63,052*
Distribution Segment										
42	Wholesale trade	52,630	99,550	152,180	4,240	5,290	9,530	8,038	8,985	17,023
44-45	Retail trade	468,650	291,310	759,960	12,874	15,677	28,551	20,717	27,198	47,915
48	Transportation	8,780	16,710	25,490	573	924	1,497	807	1,591	2,398
	Total distribution	*530,060*	*407,570*	*937,630*	*$17,687*	*$21,890*	*$39,578*	*$29,563*	*$37,774*	*$67,336*
Services Segment										
8121	Personal care services	1,563,560	687,680	2,251,240	$42,207	$34,363	$76,570	$43,513	$63,043	$106,556
	Industry Total	2,157,610	1,480,230	3,637,840	$64,978	$79,336	$144,314	$96,844	$140,100	$236,944

Source: PwC calculations using data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics and the IMPLAN modeling system (2013 database).

Note: details may not add to totals due to rounding.

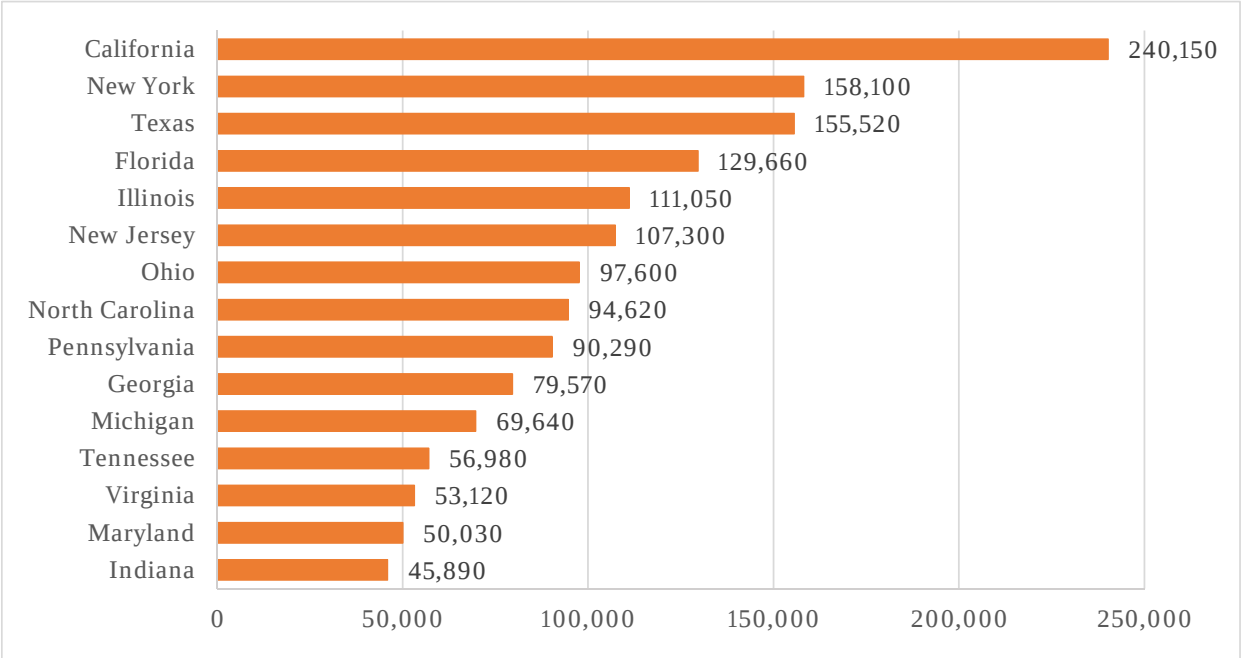
[1] Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.

[2] Labor income is defined as wages and salaries and benefits as well as proprietors' income.

State-Level Contributions

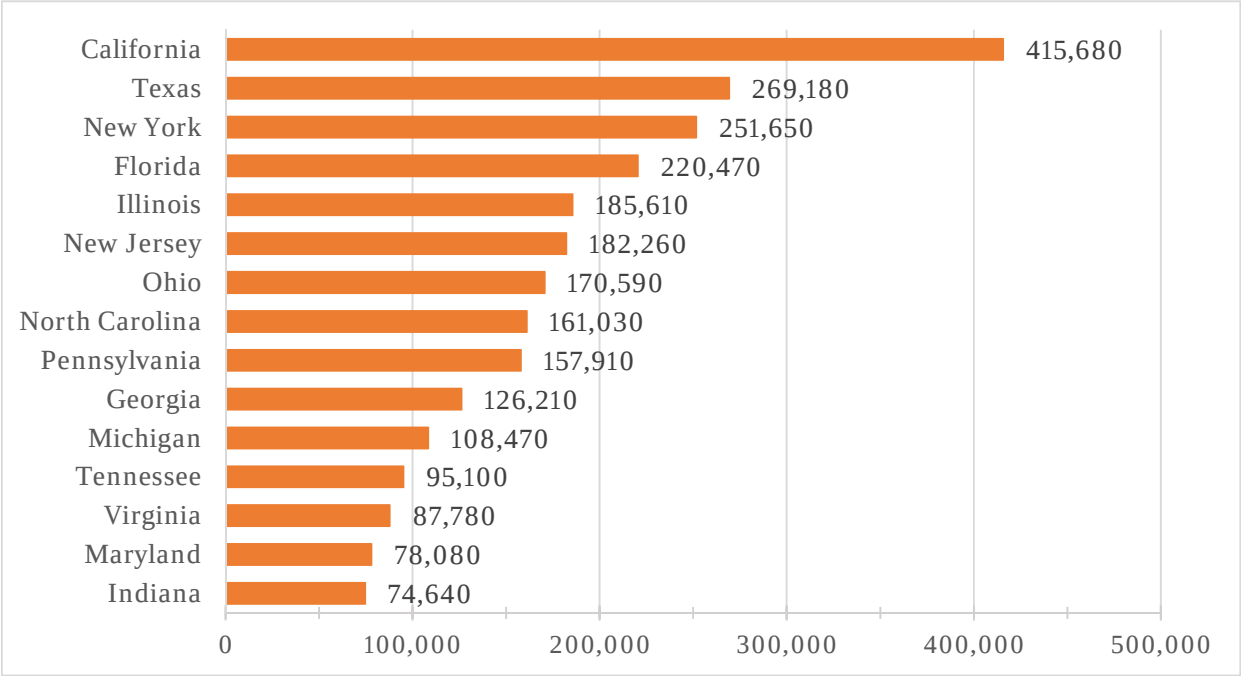
The US personal care products industry has widespread economic contributions in all 50 states and the District of Columbia. The states with the largest number of direct jobs in the personal care products industry in 2013 were California (240,150), New York (158,100), Texas (155,520), Florida (129,660), and Illinois (111,050) (see **Figure 1** below). Combined, these five states accounted for 37 percent of the direct employment in the personal care products industry. These five states also are the largest states in terms of total employment contribution (**Figure 2**).

Figure 1. Direct Jobs in the US Personal Care Products Industry, 2013 [Top 15 States]



Source: PwC calculations using data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics and the IMPLAN modeling system (2013 database).

Figure 2. Total Employment Contribution of the US Personal Care Products Industry, 2013 [Top 15 States]



Source: PwC calculations using data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics and the IMPLAN modeling system (2013 database).

The five states in which the personal care products industry directly or indirectly accounts for the largest share of total state employment are New Jersey (3.5 percent), North Carolina (2.9 percent), Tennessee (2.6 percent), Ohio (2.5 percent), and Illinois (2.5 percent).

The direct economic impact of the US personal care products industry is shown by state in **Table 4**, below. The total contribution of the personal care products industry in each of the 50 states and the District of Columbia is shown in **Table 5**.

Congressional District-Level Contributions

At the congressional district level, the number of jobs directly attributable to the personal care products industry was 1,000 or more jobs in 434 out of 435 congressional districts in 2013. The industry directly provided 5,000 or more jobs in 158 congressional districts and more than 10,000 jobs in 31 districts in 2013.

Table 4. Direct Economic Contributions of US Personal Care Products Industry, by State, 2013

State	Employment[1]		Labor Income[2]		GDP		Taxes Paid ($ millions)
	Amount	Percent of U.S. Total	($ millions)	Percent of U.S. Total	($ millions)	Percent of U.S. Total	
Alabama	31,290	1.5%	710	1.1%	830	0.9%	153
Alaska	2,310	0.1%	72	0.1%	81	0.1%	14
Arizona	32,670	1.5%	1,059	1.6%	1,446	1.5%	323
Arkansas	22,200	1.0%	620	1.0%	1,123	1.2%	287
California	240,150	11.1%	7,363	11.3%	10,539	10.9%	2,816
Colorado	28,300	1.3%	951	1.5%	1,181	1.2%	263
Connecticut	22,800	1.1%	847	1.3%	1,180	1.2%	319
Delaware	5,690	0.3%	168	0.3%	280	0.3%	54
District of Columbia	4,520	0.2%	160	0.2%	283	0.3%	67
Florida	129,660	6.0%	3,290	5.1%	4,555	4.7%	1,074
Georgia	79,570	3.7%	1,786	2.7%	2,465	2.5%	505
Hawaii	5,640	0.3%	175	0.3%	183	0.2%	37
Idaho	11,690	0.5%	364	0.6%	517	0.5%	124
Illinois	111,050	5.1%	3,307	5.1%	4,635	4.8%	1,183
Indiana	45,890	2.1%	1,235	1.9%	2,018	2.1%	446
Iowa	28,170	1.3%	1,096	1.7%	1,680	1.7%	375
Kansas	13,750	0.6%	403	0.6%	473	0.5%	78
Kentucky	23,420	1.1%	654	1.0%	982	1.0%	201
Louisiana	31,540	1.5%	812	1.3%	1,129	1.2%	216
Maine	6,210	0.3%	175	0.3%	200	0.2%	45
Maryland	50,030	2.3%	1,602	2.5%	2,788	2.9%	665
Massachusetts	39,980	1.9%	1,393	2.1%	1,744	1.8%	395
Michigan	69,640	3.2%	1,579	2.4%	1,971	2.0%	473
Minnesota	38,510	1.8%	1,263	1.9%	1,734	1.8%	440
Mississippi	19,380	0.9%	423	0.7%	617	0.6%	146
Missouri	41,690	1.9%	1,200	1.8%	1,714	1.8%	360
Montana	4,520	0.2%	128	0.2%	123	0.1%	20
Nebraska	10,780	0.5%	343	0.5%	481	0.5%	82
Nevada	14,300	0.7%	421	0.6%	494	0.5%	97
New Hampshire	7,320	0.3%	252	0.4%	253	0.3%	45
New Jersey	107,300	5.0%	3,977	6.1%	7,101	7.3%	2,051
New Mexico	7,020	0.3%	211	0.3%	238	0.2%	51
New York	158,100	7.3%	5,004	7.7%	9,048	9.3%	2,663
North Carolina	94,620	4.4%	2,905	4.5%	5,780	6.0%	1,175
North Dakota	3,890	0.2%	122	0.2%	177	0.2%	38
Ohio	97,600	4.5%	3,020	4.6%	5,185	5.4%	1,245
Oklahoma	16,640	0.8%	410	0.6%	491	0.5%	91
Oregon	17,770	0.8%	542	0.8%	565	0.6%	105
Pennsylvania	90,290	4.2%	2,682	4.1%	3,945	4.1%	993
Rhode Island	5,170	0.2%	146	0.2%	158	0.2%	35
South Carolina	23,270	1.1%	596	0.9%	660	0.7%	116
South Dakota	3,710	0.2%	121	0.2%	106	0.1%	19
Tennessee	56,980	2.6%	1,707	2.6%	2,591	2.7%	600
Texas	155,520	7.2%	5,049	7.8%	6,955	7.2%	1,452
Utah	17,440	0.8%	452	0.7%	669	0.7%	146
Vermont	4,300	0.2%	142	0.2%	175	0.2%	53
Virginia	53,120	2.5%	1,739	2.7%	2,648	2.7%	593
Washington	35,000	1.6%	1,269	2.0%	1,549	1.6%	344
West Virginia	5,840	0.3%	161	0.2%	169	0.2%	28
Wisconsin	28,150	1.3%	778	1.2%	784	0.8%	145
Wyoming	3,230	0.1%	94	0.1%	149	0.2%	39
U.S. Total	**2,157,610**	**100%**	**64,978**	**100%**	**96,844**	**100%**	**23,286**

Source: PwC alculations using IMPLAN modeling system (2013 database).

Numbers may not add to total due to rounding.

[1] Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.

[2] Labor income is defined as wages and salaries and benefits as well as proprietors' income.

Table 5. Total Economic Contributions of US Personal Care Products Industry, by State, 2013

State	Employment[1]		Labor Income[2]		GDP		Taxes Paid ($ millions)
	Amount	Percent of State Total	($ millions)	Percent of State Total	($ millions)	Percent of State Total	
Alabama	47,770	1.9%	1,407	1.2%	2,150	1.1%	440
Alaska	4,350	0.9%	198	0.6%	393	0.6%	102
Arizona	58,540	1.7%	2,261	1.3%	3,597	1.3%	827
Arkansas	37,160	2.4%	1,280	1.8%	2,354	1.9%	564
California	415,680	1.9%	17,860	1.3%	28,995	1.3%	7,267
Colorado	51,190	1.5%	2,154	1.2%	3,261	1.1%	739
Connecticut	38,530	1.7%	1,881	1.2%	2,976	1.2%	755
Delaware	9,110	1.7%	360	1.1%	681	1.1%	137
District of Columbia	7,180	0.9%	407	0.5%	659	0.6%	154
Florida	220,470	2.1%	7,378	1.5%	11,750	1.5%	2,793
Georgia	126,210	2.3%	4,043	1.4%	6,523	1.4%	1,364
Hawaii	10,290	1.1%	412	0.8%	602	0.7%	138
Idaho	20,270	2.2%	710	1.8%	1,115	1.8%	259
Illinois	185,610	2.5%	7,590	1.7%	12,011	1.7%	2,953
Indiana	74,640	2.0%	2,567	1.4%	4,579	1.4%	980
Iowa	47,800	2.4%	2,001	2.0%	3,282	2.0%	734
Kansas	23,900	1.3%	891	1.0%	1,319	0.9%	239
Kentucky	39,750	1.6%	1,374	1.2%	2,277	1.2%	496
Louisiana	48,890	1.9%	1,635	1.2%	2,913	1.1%	566
Maine	11,360	1.4%	398	1.1%	580	1.0%	139
Maryland	78,080	2.3%	3,173	1.5%	5,588	1.7%	1,328
Massachusetts	67,280	1.5%	3,147	1.1%	4,668	1.0%	1,083
Michigan	108,470	2.0%	3,415	1.3%	5,252	1.2%	1,245
Minnesota	70,310	2.0%	2,985	1.5%	4,582	1.5%	1,124
Mississippi	29,700	2.0%	844	1.3%	1,376	1.3%	324
Missouri	71,690	2.0%	2,645	1.5%	4,225	1.5%	901
Montana	7,910	1.2%	260	1.0%	365	0.8%	75
Nebraska	18,420	1.5%	722	1.1%	1,159	1.1%	195
Nevada	24,390	1.6%	896	1.2%	1,381	1.0%	303
New Hampshire	12,830	1.5%	534	1.2%	727	1.1%	155
New Jersey	182,260	3.5%	8,823	2.6%	15,184	2.9%	4,079
New Mexico	12,190	1.1%	430	0.8%	673	0.7%	150
New York	251,650	2.2%	11,451	1.4%	20,132	1.5%	5,609
North Carolina	161,030	2.9%	6,075	2.2%	11,586	2.5%	2,465
North Dakota	6,680	1.2%	272	0.8%	438	0.8%	99
Ohio	170,590	2.5%	6,696	1.9%	11,657	2.0%	2,678
Oklahoma	28,470	1.3%	991	0.9%	1,512	0.8%	312
Oregon	31,700	1.4%	1,203	1.1%	1,805	0.9%	365
Pennsylvania	157,910	2.1%	6,506	1.6%	10,331	1.6%	2,501
Rhode Island	8,640	1.4%	333	1.0%	487	0.9%	118
South Carolina	37,970	1.5%	1,222	1.1%	1,807	1.0%	371
South Dakota	6,680	1.2%	260	1.0%	351	0.8%	68
Tennessee	95,100	2.6%	3,584	1.9%	5,718	2.0%	1,301
Texas	269,180	1.7%	11,125	1.2%	18,296	1.2%	3,873
Utah	30,780	1.8%	1,045	1.3%	1,772	1.3%	382
Vermont	7,690	1.8%	289	1.5%	429	1.4%	115
Virginia	87,780	1.8%	3,617	1.3%	5,926	1.3%	1,343
Washington	59,860	1.5%	2,652	1.1%	4,078	1.0%	934
West Virginia	10,110	1.1%	354	0.8%	536	0.7%	114
Wisconsin	48,560	1.4%	1,766	1.0%	2,494	0.9%	538
Wyoming	5,240	1.3%	192	0.9%	390	0.9%	98
U.S. Total	**3,637,840**	**2.0%**	**144,314**	**1.4%**	**236,944**	**1.4%**	**55,895**

Source: PwC alculations using IMPLAN modeling system (2013 database).

Numbers may not add to total due to rounding.

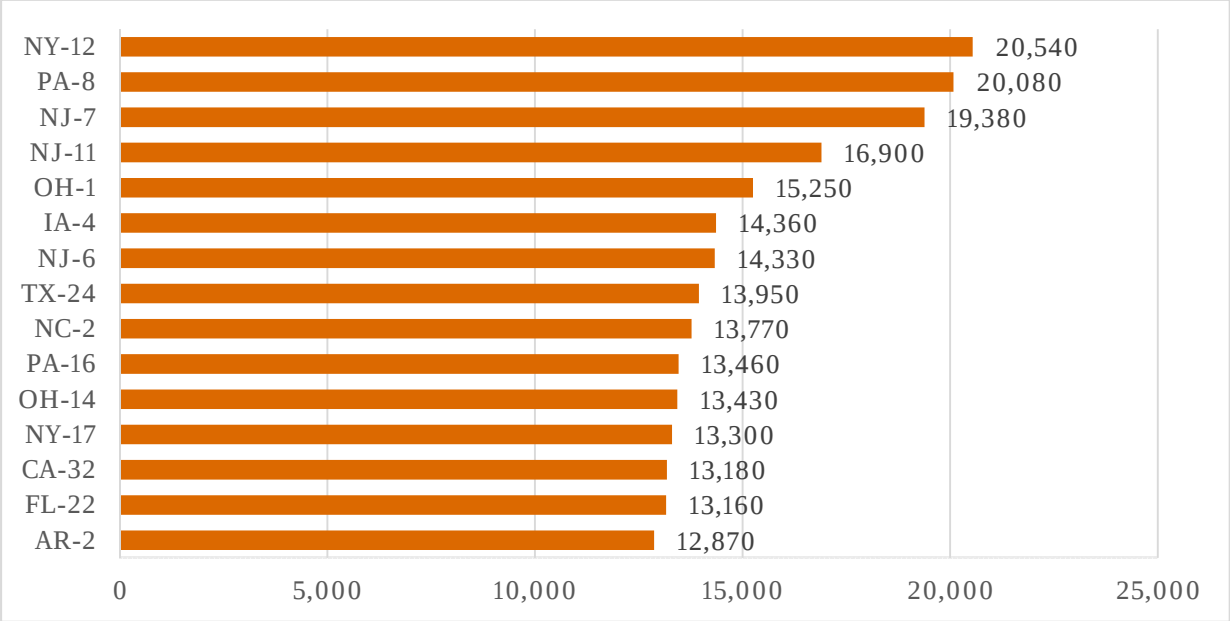
[1] Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.

[2] Labor income is defined as wages and salaries and benefits as well as proprietors' income.

The congressional districts with the largest number of *direct* jobs in the personal care products industry (20,540) are the 12th district of New York (which includes most of the East Side of Manhattan and Roosevelt Island and extends across the East River into the Boroughs of Queens (including Astoria, Long Island City, and parts of Woodside) and Brooklyn (including Greenpoint)). Pennsylvania's 8th congressional district (which includes Bucks County, along with portions of Montgomery County) had the second highest employment in the industry (20,080) followed by the 7th district of New Jersey, the 11th district of New Jersey, and Ohio's 1st congressional district (see **Figure 3**).

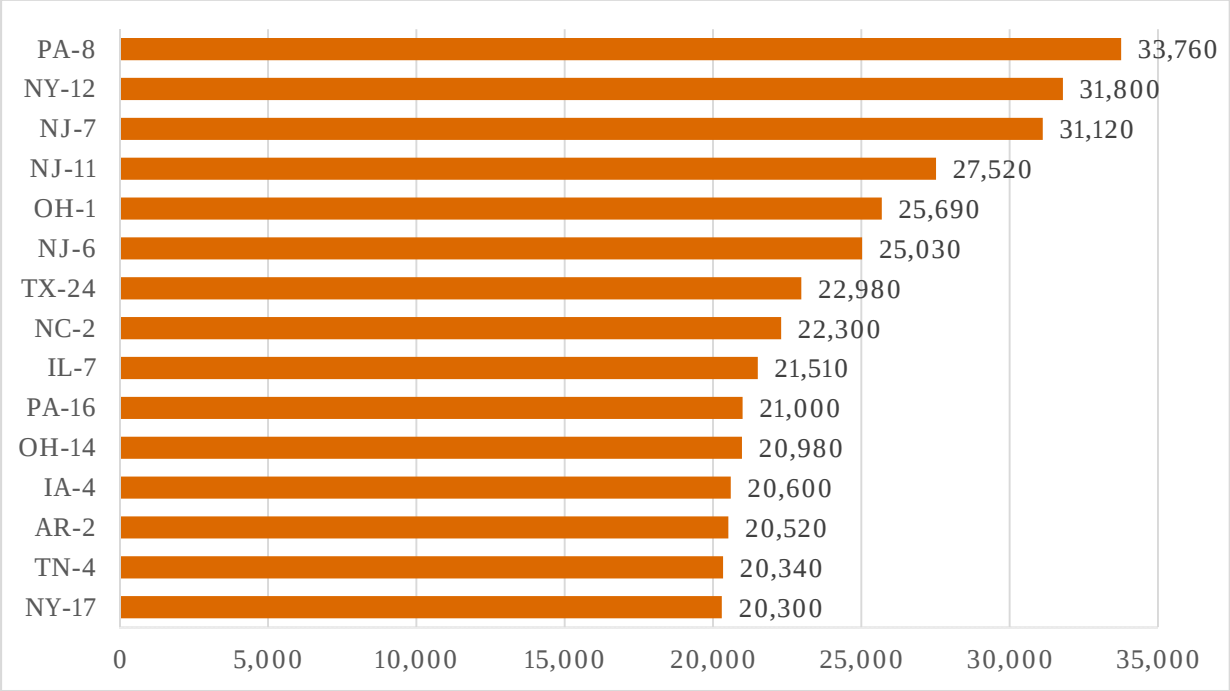
These five congressional districts are also the largest in terms of the *total* (direct, indirect, and induced) number of jobs supported by the personal care products industry (see **Figure 4**). Overall, the industry's total employment contribution was no less than 2,200 jobs in any congressional district in 2013. The personal care products industry directly or indirectly supported 5,000 or more jobs in 349 congressional districts and 10,000 or more jobs in 108 congressional districts.

Figure 3. Direct Jobs in the US Personal Care Products Industry, 2013 [Top 15 Congressional Districts]



Source: PwC calculations using data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics and the IMPLAN modeling system (2013 database).

Figure 4. Total Employment Contribution of the US Personal Care Products Industry, 2013
[Top 15 Congressional Districts]



Source: PwC calculations using data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics and the IMPLAN modeling system (2013 database).

Other Economic and Social Contributions

IV. Other Economic and Social Contributions

In addition to the economic contributions discussed above, the personal care products industry makes other important social contributions. This section quantifies and compares the personal care product industry's social contributions with other manufacturing and services industries.

A. International Trade

Between 1990 and 2014, the value of personal care products exports increased at an average annual rate of 9.5 percent, from $1.9 billion to $16.9 billion. Over the same period, the value of imported personal care products grew from $1.2 billion to $11.1 billion, an average annual growth rate of 9.9 percent. The growth of trade in personal care products has outpaced growth in trade for the overall manufacturing sector. The personal care products industry generated a trade surplus every year over the entire 1990-2014 period, reaching $5.8 billion in 2014, while the manufacturing sector as a whole recorded a trade deficit in each year of this period. The manufacturing sector as a whole posted a trade deficit of $721.8 billion in 2014 (see **Figure 5a** and **Figure 5b** below).

The personal care products industry is one of the few segments of the manufacturing sector that exported more than it imported in 2014 (**Figure 6**). The industry generated the third largest trade surplus in the manufacturing sector, behind petroleum and coal products and food.[9] Net exports as a percent of total sales was 7 percent in 2013 for the personal care products industry, the highest share of any manufacturing sector (see **Table 6**). Textiles and fabrics manufacturing was the next highest at 5 percent.[10]

[9] The comparisons provided in Figure 9 are based on 3-digit NAICS industries in the manufacturing sector.
[10] Trade surplus figures are from the International Trade Administration. Sales by domestic manufacturers are from the Census Bureau. Figures for the personal care products industry include soap and detergent manufacturers.

Figure 5a. Personal Care Products Imports and Exports, 1990-2014

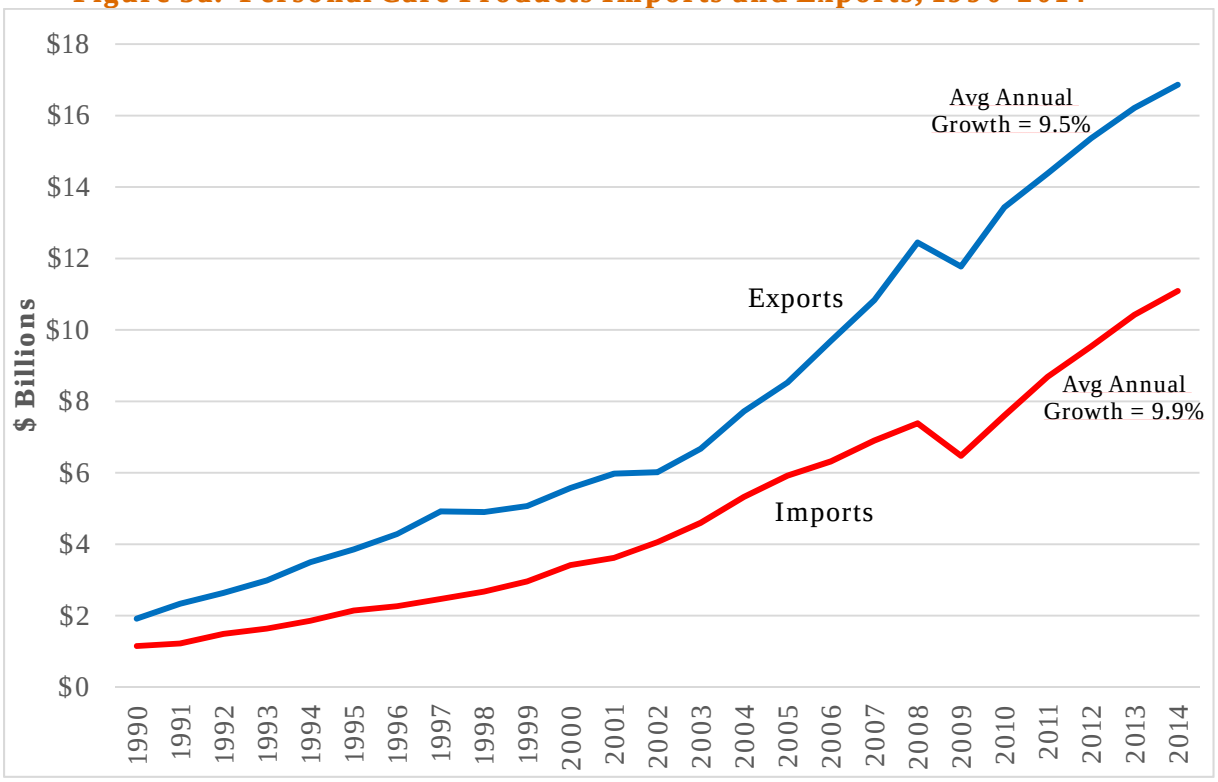
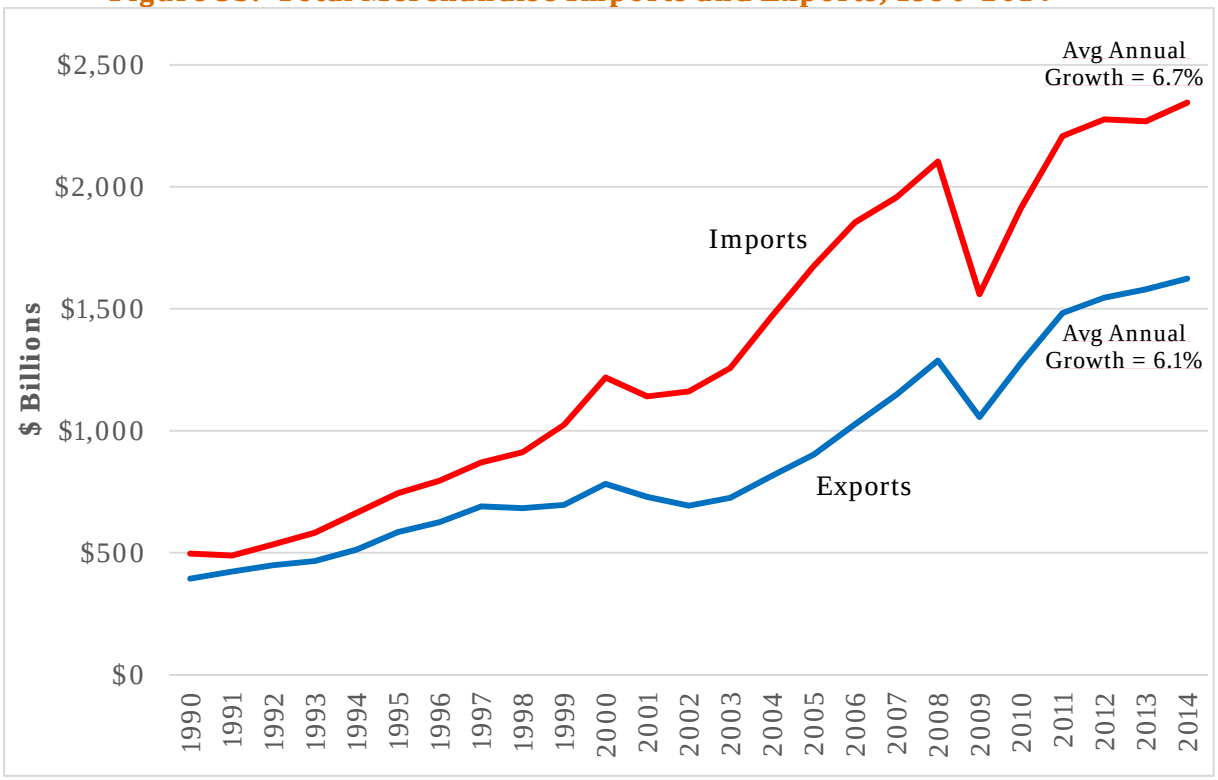
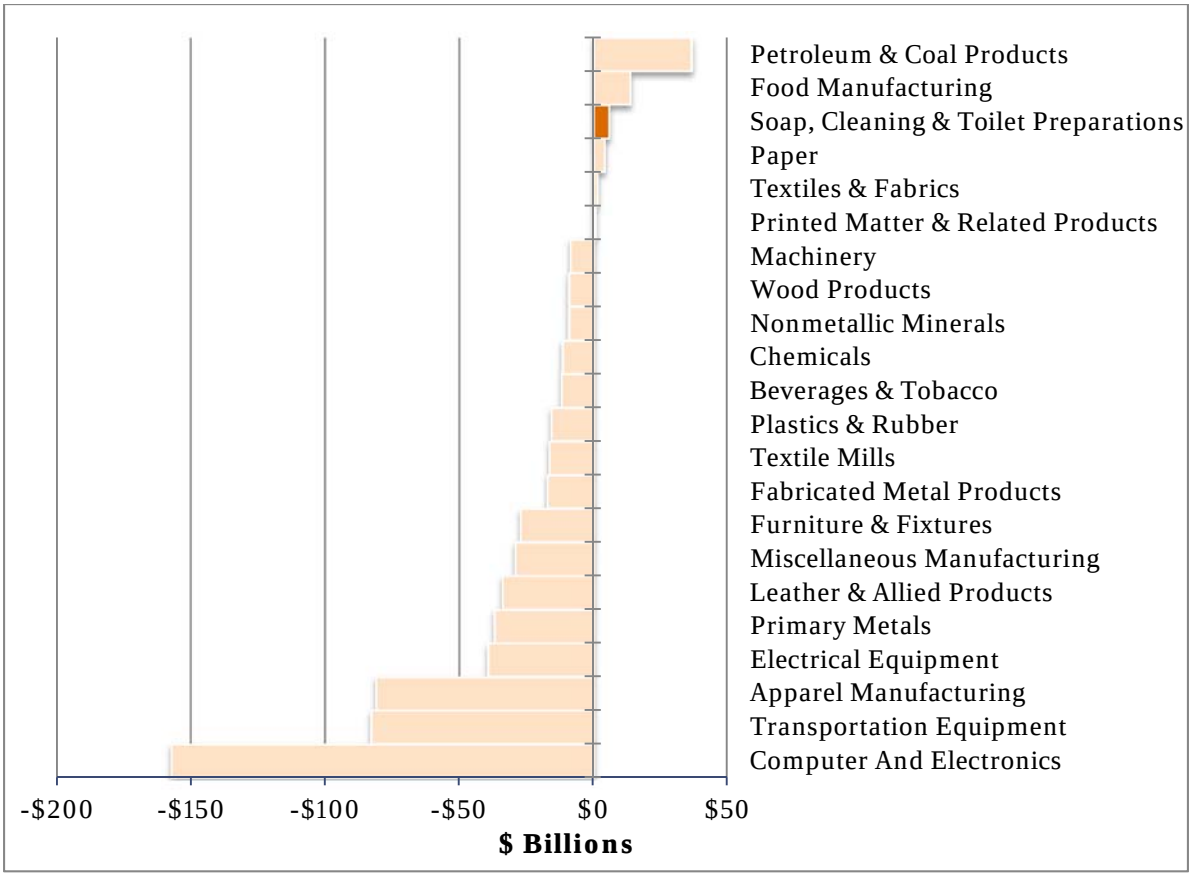


Figure 5b. Total Merchandise Imports and Exports, 1990-2014



Source: International Trade Administration, TradeStats Express.

Figure 6. Manufacturing Trade Balance by Sector, 2014



Source: International Trade Administration, TradeStats Express.

Table 6. Balance of Trade as a Percent of Total Sales by Sector, 2013 ($ billions)

NAICS Code	Sector	Balance of Trade	Total Sales	Balance as a % of Sales
3256*	Soaps, cleaning compounds & toilet preparations	5.8	78.7	7.4%
313	Textiles & fabrics	1.6	30.7	5.2%
324	Petroleum & coal products	28.4	814.8	3.5%
322	Paper	4.8	181.2	2.6%
311	Food manufactures	16.0	800.1	2.0%
323	Printed matter & related products	1.2	78.8	1.5%
333	Machinery	3.3	371.8	0.9%
325**	Other chemicals	-1.9	661.3	-0.3%
332	Fabricated metal products	-15.7	325.4	-4.8%
326	Plastics & rubber products	-14.8	217.0	-6.8%
331	Primary metals	-18.9	254.4	-7.4%
312	Beverages & tobacco products	-11.1	145.7	-7.6%
327	Nonmetallic mineral products	-7.8	100.3	-7.8%
	All Manufacturing	**-472.0**	**5,842.4**	**-8.1%**
336	Transportation equipment	-89.0	1,030.4	-8.6%
321	Wood products	-8.6	84.9	-10.1%
339	Miscellaneous manufacturing	-29.9	140.9	-21.2%
335	Electrical equipment, appliances & components	-36.8	115.8	-31.8%
337	Furniture & fixtures	-24.9	64.7	-38.4%
334	Computer and electronic products	-146.7	307.8	-47.7%
314	Textile mills products	-15.6	22.3	-70.2%
316	Leather & allied products	-32.3	4.9	-653.8%
315	Apparel manufacturing	-79.0	10.4	-761.9%

Source: PwC calculations based on data from the U.S. Census Bureau.
*Includes detergents and other products that are not personal care products.
**Excludes NAICS 3256.

B. Diversity

The personal care products industry employs a diverse workforce. According to employment reports filed with the Equal Employment Opportunity Commission (EEOC), in 2013 women and minorities accounted for 73.5 percent of all employment in the personal care products industry and 61.2 percent of management positions.[11] Hispanics accounted for 12 percent of all employment in the industry, African American accounted for 10 percent of all employment, and Asians, American Indians, and other minorities accounted for 6 percent.

[11] Based on 107,759 employees in 435 surveyed businesses. Surveyed businesses reported 66,862 employees were women and 29,938 were minorities (12,362 minority men and 17,576 minority women).

The EEOC data indicate that women comprised a larger share of the personal care product industry's workforce than the economy-wide average in 2013. In particular:

- Women comprised 62.0 percent of the personal care products industry's workforce, compared to 48 percent of the workforce across all industries (**Figure 7a**).
- Women were more prevalent in management positions in the personal care products industry, representing more than half (52.9 percent) of management positions compared to 37.3 percent across all industries (**Figure 7b**).
- Minority women accounted for 11.3 percent of all management positions in the personal care products industry, compared to 8.3 percent of management positions across all industries (**Figure 7b**).

Figure 7a. Composition of the US Workforce: Personal Care Products and All Industries, 2013

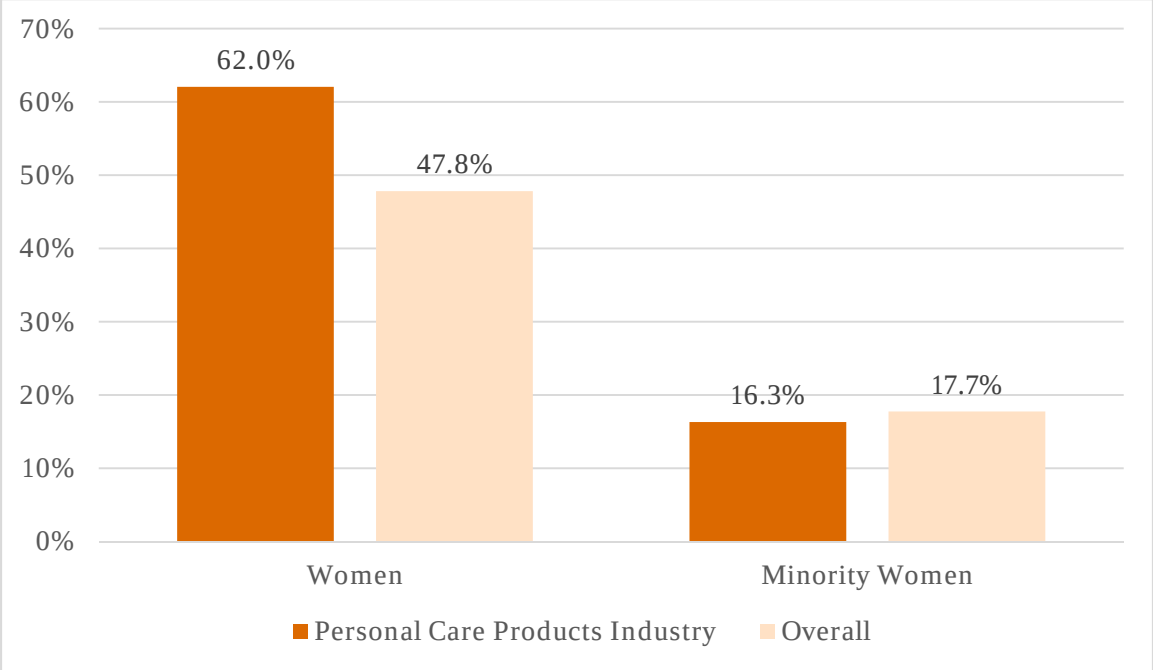
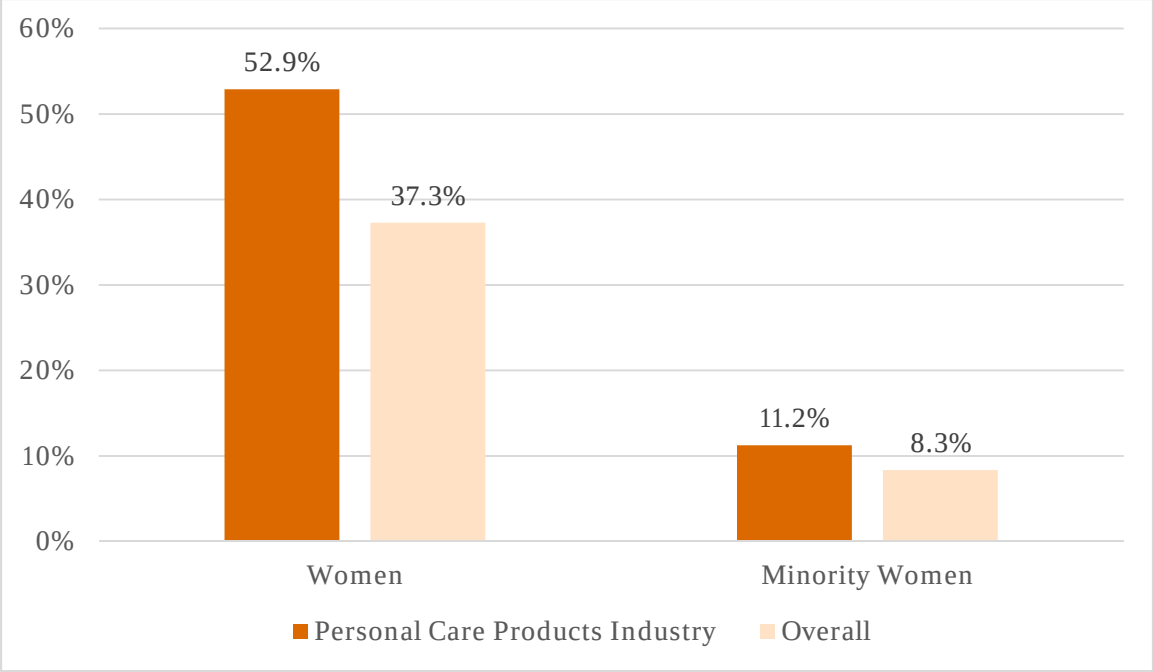


Figure 7b. Composition of US Management Positions: Personal Care Products and All Industries, 2013

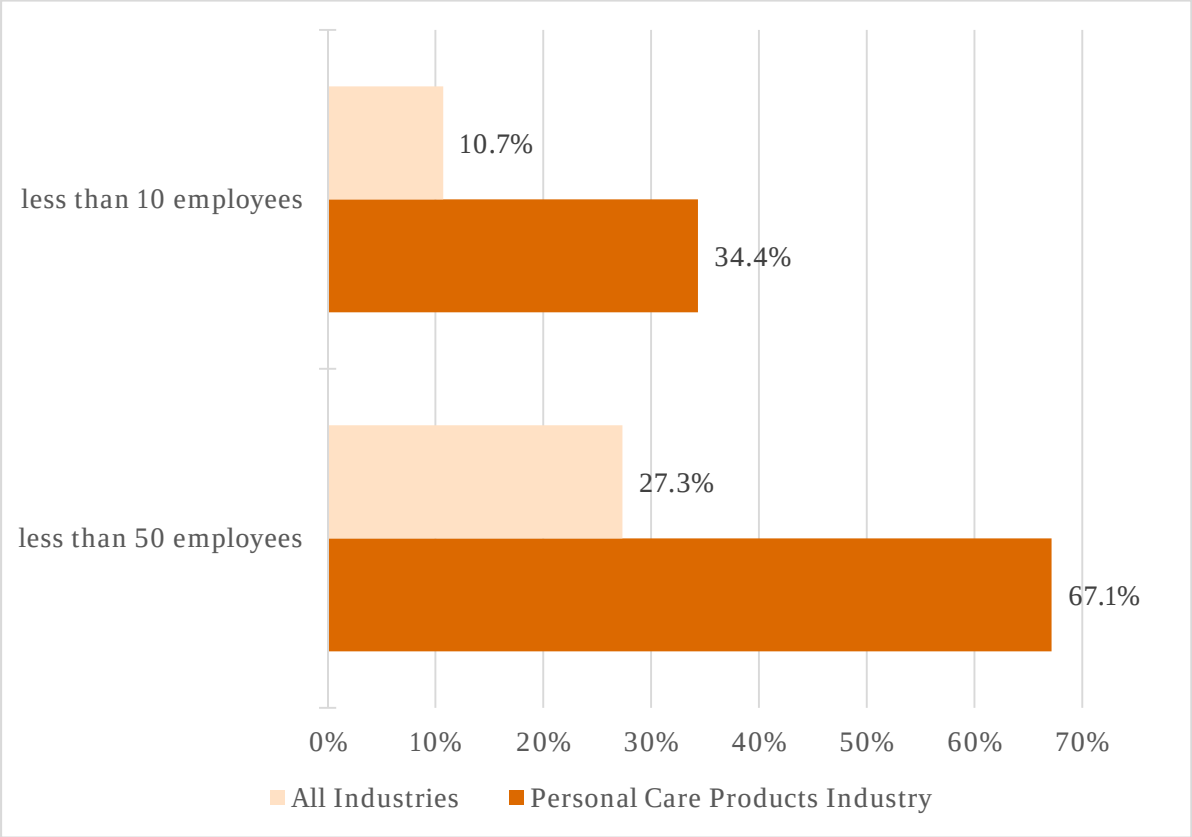


Source: EEOC, *2013 Job Patterns for Minorities and Women in Private Industry* (EEO-1 Survey). Results based on employment in surveyed units in NAICS sectors 325610, 325620, 446120, 812110, and 812190.

C. Opportunities for Small Businesses and Job Creation

The personal care products industry consists of a large number of relatively small entrepreneurial businesses. In 2012, the latest year for which data are available, there were 1,197 manufacturing firms and 99,100 service providing firms in the personal care products industry with fewer than 50 employees firm-wide. Over 34 percent of total employment in the personal care products industry was in firms with fewer than 10 employees, compared to 11 percent in all industries; 67 percent of total employment in the personal care products industry was in firms with fewer than 50 employees firm-wide, compared to 27 percent in all industries (see **Figure 8**).

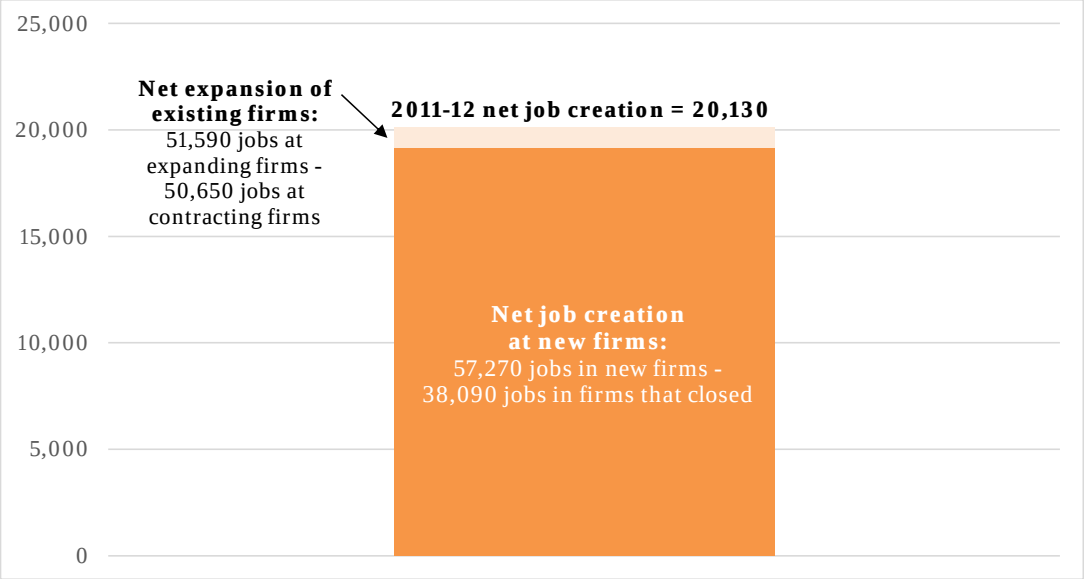
Figure 8. Share of Employees by Size of US Business: Personal Care Products and All Industries, 2013



Source: PwC calculations using data from US Census Bureau, *Statistics of US Businesses 2012*. Data include all businesses in NAICS 325611, 325620, and 8121.

From 2011 to 2012, direct employment in personal care products manufacturing and services businesses with fewer than 100 employees increased by 20,000 jobs, of which more than 17,500 were in companies with fewer than 10 employees. These 20,000 new jobs represent jobs added at new and expanding establishments (108,860) less jobs lost at establishments that closed or contracted (88,750) during 2012 (see **Figure 9**). In contrast personal care products manufacturing and services businesses with more than 100 employees lost 12,520 jobs in 2012, primarily due to contractions among existing establishments.

Figure 9. Net Job Creation at Personal Care Products Firms with Less than 100 Employees, 2012



Source: Source: PwC calculations using data from US Census Bureau, *Statistics of US Businesses 2012*. Data include all businesses in NAICS 325611, 325620, and 8121.

D. Occupations in the Personal Care Products Industry

The personal care products industry encompasses a wide range of occupations, including jobs in sales, production, and services. Within the manufacturing segment, jobs range from production workers, management and supervisors, to chemists and biologists. In 2013, personal care products manufacturing included more than 5,800 jobs in science, technology, engineering, and mathematics (STEM) occupations, accounting for 9.1 percent of all jobs in the manufacturing segment (**Table 7**). In comparison, STEM occupations account for 5.9 percent of all jobs in nondurable goods manufacturing.

Table 7. Personal Care Product Manufacturing Employment in Science, Technology, Engineering, and Mathematics Occupations, 2013

Occupation/Group	Soap and other detergent	Toilet preparation	Total	Percent of total
STEM Occupations				
Scientists, chemists and related occupations	230	2,300	2,530	4.0%
Computer and information systems related occupations	120	1,200	1,320	2.1%
Engineering occupations	130	1,310	1,440	2.3%
Other occupations	50	500	550	0.9%
Subtotal	*520*	*5,320*	*5,840*	*9.1%*
Non-STEM Occupations	5,180	52,970	58,150	90.9%
All Occupations	**5,700**	**58,290**	**63,990**	**100.0%**

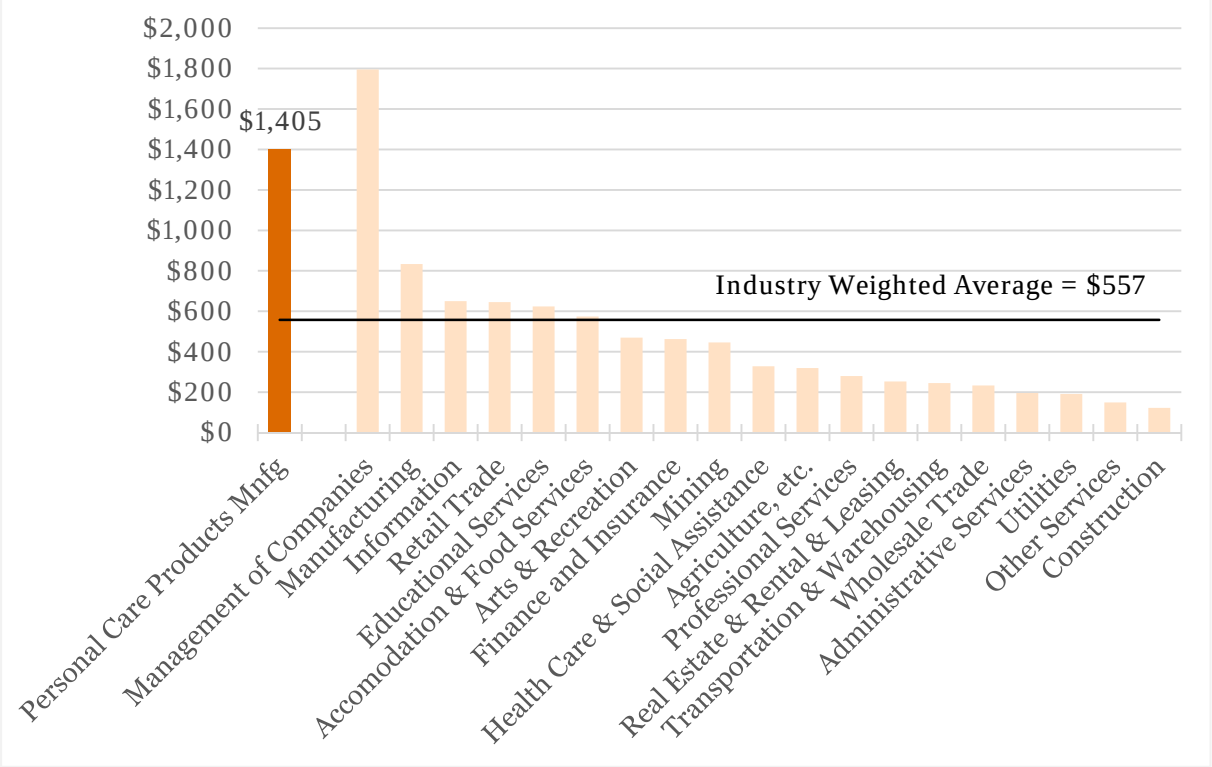
Source: PwC calculations based on data from US Bureau of Labor Statistics, *Occupational Employment Statistics* database. Details may not add to totals due to rounding.

The largest number of STEM jobs in personal care products manufacturing were scientists, chemists, and related occupations (2,530), followed by engineering occupations (1,440), and computer and IT occupations (1,320).

E. Charitable Contributions

In 2012, the latest year for which data were available, corporate manufacturers of personal care products contributed nearly $134 million to charitable causes, as reported on tax returns. For every $1 million in revenue, personal care product manufacturers made charitable contributions of approximately $1,400; the second highest amount of all major industry sectors. Across all industries corporate charitable contributions averaged $557 per $1 million of revenues in 2012, less than half of the personal care products industry (**Figure 10**).

Figure 10. Charitable Contributions per $1 Million in Receipts, 2012



Source: IRS, Statistics of Income Division, *Corporation Source Book, 2012*. Data include all corporations in NAICS 3256 (Soap, Cleaning Compound, and Toilet Preparation Manufacturing).

F. Research and Development

Based on National Science Foundation data, personal care products manufacturers increased their spending on research and development (R&D) at an average annual rate of 9.7 percent over the ten year period from 2002 to 2011 (**Table 8**). In comparison, all manufacturers increased R&D spending by 6.9 percent per year over the same period. In 2011, R&D in personal care products manufacturing accounted for 1.5 percent of all US manufacturing R&D, up from 1.2 percent in 2002.

Table 8. Research and Development Spending, 2002-2011
[Dollar Amounts in $ Billions]

	2002	2011	Average Annual Growth Rate, 2002-11
Total manufacturing	$102.7	$186.9	6.9%
Personal care products manufacturing	$1.2	$2.8	9.7%
Personal care products as a share of total manufacturing	1.2%	1.5%	

Source: National Science Foundation, Business Research and Development and Innovation Survey, various years and PwC calculations. Personal care products manufacturing includes all of NAICS 3256 (Soap, Cleaning Compound, and Toilet Preparation Manufacturing).

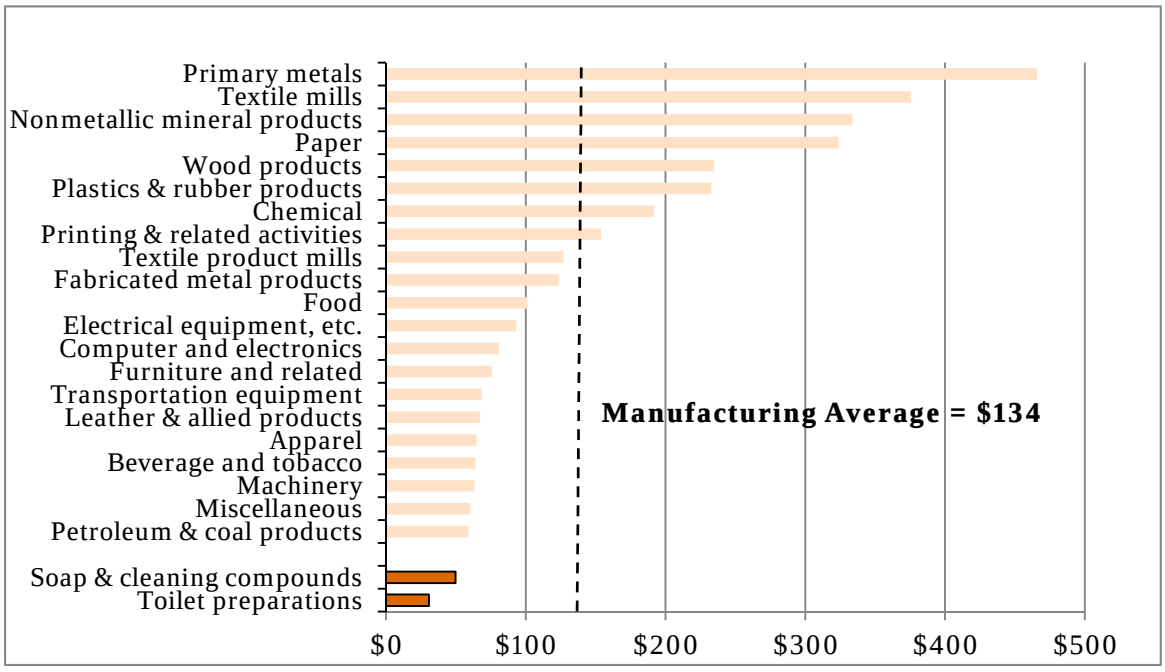
G. Environmental Impact

Global warming. As a part of the Carbon Disclosure Project, several of the largest manufacturers in the personal care products industry reported their carbon footprints in 2013. In aggregate, the reporting companies reduced their global warming emissions 2.8 percent from 2012 to 2013 despite increasing sales by 2.4 percent.[12]

Energy efficiency. Compared to other manufacturers, personal care product manufacturers are less energy intensive. Each $1,000 of shipments of toilet preparation products consumed 31 kilowatt hours (kWh) of purchased electricity and each $1,000 of soap and cleaning compound products consumed 50 kWh. For manufacturing overall, electricity consumption per $1,000 of shipments averaged 134 kWh, and by industry ranged from 59 to 466 kWh per $1,000 of shipments (see **Figure 11**).

[12] Based on disclosures for the following major manufacturers: Amway, Avon, Colgate-Palmolive, Johnson & Johnson, Kimberly Clark, L Brands, L'Oreal, Procter & Gamble, Shiseido, and Unilever. The 2.8 percent reduction reported here refers to direct emissions from sources owned or controlled by the reporting organizations. Including indirect emissions resulting from consumption of purchased electricity and other fuels, these companies reduced emissions by 5.5 percent from 2012 to 2013.

Figure 11. Manufacturing Energy Intensity: Purchased Electricity (kWh) per $1,000 in Shipments



Source: US Census Bureau, *2013 Annual Survey of Manufacturers*.

Appendix A: Detailed State-Level Results

Table A-1. Employment Contribution of the Personal Care Products Industry, by State, 2013

State	Direct Employment	Indirect Employment	Induced Employment	Total Employment Contribution	Total as a % of State Total Employment
Alabama	31,290	5,950	10,530	47,770	1.9%
Alaska	2,310	630	1,410	4,350	0.9%
Arizona	32,670	8,450	17,410	58,540	1.7%
Arkansas	22,200	6,240	8,720	37,160	2.4%
California	240,150	64,210	111,330	415,680	1.9%
Colorado	28,300	7,360	15,530	51,190	1.5%
Connecticut	22,800	5,040	10,700	38,530	1.7%
Delaware	5,690	1,110	2,310	9,110	1.7%
District of Columbia	4,520	770	1,890	7,180	0.9%
Florida	129,660	32,730	58,080	220,470	2.1%
Georgia	79,570	17,300	29,340	126,210	2.3%
Hawaii	5,640	1,490	3,160	10,290	1.1%
Idaho	11,690	3,310	5,280	20,270	2.2%
Illinois	111,050	27,630	46,920	185,610	2.5%
Indiana	45,890	10,700	18,040	74,640	2.0%
Iowa	28,170	7,050	12,580	47,800	2.4%
Kansas	13,750	3,180	6,970	23,900	1.3%
Kentucky	23,420	5,930	10,390	39,750	1.6%
Louisiana	31,540	5,780	11,560	48,890	1.9%
Maine	6,210	1,740	3,410	11,360	1.4%
Maryland	50,030	9,800	18,250	78,080	2.3%
Massachusetts	39,980	8,290	19,010	67,280	1.5%
Michigan	69,640	13,440	25,390	108,470	2.0%
Minnesota	38,510	11,090	20,710	70,310	2.0%
Mississippi	19,380	3,900	6,420	29,700	2.0%
Missouri	41,690	10,700	19,300	71,690	2.0%
Montana	4,520	1,020	2,380	7,910	1.2%
Nebraska	10,780	2,340	5,300	18,420	1.5%
Nevada	14,300	3,110	6,980	24,390	1.6%
New Hampshire	7,320	1,740	3,770	12,830	1.5%
New Jersey	107,300	30,320	44,640	182,260	3.5%
New Mexico	7,020	1,560	3,620	12,190	1.1%
New York	158,100	33,860	59,690	251,650	2.2%
North Carolina	94,620	26,200	40,220	161,030	2.9%
North Dakota	3,890	910	1,880	6,680	1.2%
Ohio	97,600	27,970	45,010	170,590	2.5%
Oklahoma	16,640	3,940	7,900	28,470	1.3%
Oregon	17,770	4,420	9,500	31,700	1.4%
Pennsylvania	90,290	25,500	42,130	157,910	2.1%
Rhode Island	5,170	1,080	2,390	8,640	1.4%
South Carolina	23,270	4,820	9,880	37,970	1.5%
South Dakota	3,710	880	2,100	6,680	1.2%
Tennessee	56,980	14,590	23,530	95,100	2.6%
Texas	155,520	38,480	75,180	269,180	1.7%
Utah	17,440	5,080	8,260	30,780	1.8%
Vermont	4,300	1,240	2,150	7,690	1.8%
Virginia	53,120	12,000	22,660	87,780	1.8%
Washington	35,000	7,560	17,300	59,860	1.5%
West Virginia	5,840	1,340	2,930	10,110	1.1%
Wisconsin	28,150	6,430	13,980	48,560	1.4%
Wyoming	3,230	720	1,290	5,240	1.3%
U.S. Total	**2,157,610**	**530,930**	**949,310**	**3,637,840**	**2.0%**

Source: PwC calculations using IMPLAN modeling system (2013 database).

Numbers may not add to total due to rounding.

Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.

Table A-2. Labor Income Contribution of the Personal Care Products Industry, by State, 2013 ($ millions)

State	Direct Labor Income	Indirect Labor Income	Induced Labor Income	Total Contribution	Total as a % of State Total Labor Income
Alabama	710	266	431	1,407	1.2%
Alaska	72	45	80	198	0.6%
Arizona	1,059	423	779	2,261	1.3%
Arkansas	620	316	344	1,280	1.8%
California	7,363	4,411	6,086	17,860	1.3%
Colorado	951	451	753	2,154	1.2%
Connecticut	847	390	644	1,881	1.2%
Delaware	168	73	119	360	1.1%
District of Columbia	160	84	162	407	0.5%
Florida	3,290	1,599	2,489	7,378	1.5%
Georgia	1,786	915	1,343	4,043	1.4%
Hawaii	175	85	152	412	0.8%
Idaho	364	145	202	710	1.8%
Illinois	3,307	1,844	2,439	7,590	1.7%
Indiana	1,235	546	786	2,567	1.4%
Iowa	1,096	368	537	2,001	2.0%
Kansas	403	173	315	891	1.0%
Kentucky	654	288	432	1,374	1.2%
Louisiana	812	305	518	1,635	1.2%
Maine	175	84	140	398	1.1%
Maryland	1,602	636	935	3,173	1.5%
Massachusetts	1,393	620	1,133	3,147	1.1%
Michigan	1,579	712	1,124	3,415	1.3%
Minnesota	1,263	707	1,015	2,985	1.5%
Mississippi	423	170	251	844	1.3%
Missouri	1,200	601	844	2,645	1.5%
Montana	128	43	90	260	1.0%
Nebraska	343	131	248	722	1.1%
Nevada	421	160	316	896	1.2%
New Hampshire	252	100	182	534	1.2%
New Jersey	3,977	2,348	2,498	8,823	2.6%
New Mexico	211	72	148	430	0.8%
New York	5,004	2,721	3,726	11,451	1.4%
North Carolina	2,905	1,424	1,746	6,075	2.2%
North Dakota	122	52	98	272	0.8%
Ohio	3,020	1,646	2,030	6,696	1.9%
Oklahoma	410	216	365	991	0.9%
Oregon	542	242	418	1,203	1.1%
Pennsylvania	2,682	1,712	2,112	6,506	1.6%
Rhode Island	146	66	121	333	1.0%
South Carolina	596	224	402	1,222	1.1%
South Dakota	121	44	95	260	1.0%
Tennessee	1,707	774	1,103	3,584	1.9%
Texas	5,049	2,313	3,762	11,125	1.2%
Utah	452	251	342	1,045	1.3%
Vermont	142	59	87	289	1.5%
Virginia	1,739	766	1,112	3,617	1.3%
Washington	1,269	488	895	2,652	1.1%
West Virginia	161	70	122	354	0.8%
Wisconsin	778	352	636	1,766	1.0%
Wyoming	94	40	58	192	0.9%
U.S. Total	**64,978**	**32,571**	**46,765**	**144,314**	**1.4%**

Source: PwC calculations using IMPLAN modeling system (2013 database).
Numbers may not add to total due to rounding.
Labor income includes wages and salaries and benefits as well as proprietors' income.

Table A-3. Contribution to GDP of the Personal Care Products Industry, by State, 2013 ($ millions)

State	Direct GDP	Indirect GDP	Induced GDP	Total GDP Contribution	Total as a % of State Total GDP
Alabama	830	549	771	2,150	1.1%
Alaska	81	125	188	393	0.6%
Arizona	1,446	792	1,359	3,597	1.3%
Arkansas	1,123	587	644	2,354	1.9%
California	10,539	7,923	10,533	28,995	1.3%
Colorado	1,181	798	1,283	3,261	1.1%
Connecticut	1,180	709	1,086	2,976	1.2%
Delaware	280	157	245	681	1.1%
District of Columbia	283	134	242	659	0.6%
Florida	4,555	2,925	4,270	11,750	1.5%
Georgia	2,465	1,714	2,344	6,523	1.4%
Hawaii	183	155	264	602	0.7%
Idaho	517	259	340	1,115	1.8%
Illinois	4,635	3,209	4,168	12,011	1.7%
Indiana	2,018	1,116	1,445	4,579	1.4%
Iowa	1,680	657	945	3,282	2.0%
Kansas	473	310	535	1,319	0.9%
Kentucky	982	536	759	2,277	1.2%
Louisiana	1,129	750	1,034	2,913	1.1%
Maine	200	147	233	580	1.0%
Maryland	2,788	1,174	1,626	5,588	1.7%
Massachusetts	1,744	1,103	1,821	4,668	1.0%
Michigan	1,971	1,329	1,952	5,252	1.2%
Minnesota	1,734	1,183	1,665	4,582	1.5%
Mississippi	617	329	430	1,376	1.3%
Missouri	1,714	1,062	1,449	4,225	1.5%
Montana	123	87	155	365	0.8%
Nebraska	481	249	428	1,159	1.1%
Nevada	494	318	569	1,381	1.0%
New Hampshire	253	175	299	727	1.1%
New Jersey	7,101	3,889	4,193	15,184	2.9%
New Mexico	238	157	279	673	0.7%
New York	9,048	4,752	6,332	20,132	1.5%
North Carolina	5,780	2,646	3,160	11,586	2.5%
North Dakota	177	101	160	438	0.8%
Ohio	5,185	2,904	3,568	11,657	2.0%
Oklahoma	491	400	621	1,512	0.8%
Oregon	565	490	749	1,805	0.9%
Pennsylvania	3,945	2,880	3,506	10,331	1.6%
Rhode Island	158	121	207	487	0.9%
South Carolina	660	444	703	1,807	1.0%
South Dakota	106	82	164	351	0.8%
Tennessee	2,591	1,345	1,782	5,718	2.0%
Texas	6,955	4,620	6,721	18,296	1.2%
Utah	669	482	621	1,772	1.3%
Vermont	175	105	148	429	1.4%
Virginia	2,648	1,337	1,941	5,926	1.3%
Washington	1,549	917	1,612	4,078	1.0%
West Virginia	169	149	218	536	0.7%
Wisconsin	784	637	1,073	2,494	0.9%
Wyoming	149	110	131	390	0.9%
U.S. Total	**96,844**	**59,130**	**80,970**	**236,944**	**1.4%**

Source: PwC calculations using IMPLAN modeling system (2013 database).
Numbers may not add to total due to rounding.

Table A-4. Tax Contribution of the Personal Care Products Industry, by State, 2013 ($ millions)

State	Direct Taxes Paid	Indirect Tax Contribution	Induced Tax Contribution	Total Tax Contribution
Alabama	153	113	174	440
Alaska	14	36	53	102
Arizona	323	176	328	827
Arkansas	287	129	148	564
California	2,816	1,863	2,588	7,267
Colorado	263	173	304	739
Connecticut	319	162	274	755
Delaware	54	32	50	137
District of Columbia	67	30	57	154
Florida	1,074	676	1,043	2,793
Georgia	505	346	513	1,364
Hawaii	37	35	66	138
Idaho	124	58	77	259
Illinois	1,183	750	1,021	2,953
Indiana	446	220	315	980
Iowa	375	144	214	734
Kansas	78	44	117	239
Kentucky	201	114	181	496
Louisiana	216	134	215	566
Maine	45	35	58	139
Maryland	665	270	393	1,328
Massachusetts	395	253	435	1,083
Michigan	473	302	470	1,245
Minnesota	440	274	410	1,124
Mississippi	146	74	104	324
Missouri	360	218	323	901
Montana	20	19	36	75
Nebraska	82	30	83	195
Nevada	97	67	139	303
New Hampshire	45	40	70	155
New Jersey	2,051	963	1,065	4,079
New Mexico	51	35	65	150
New York	2,663	1,242	1,704	5,609
North Carolina	1,175	569	721	2,465
North Dakota	38	24	38	99
Ohio	1,245	626	807	2,678
Oklahoma	91	83	138	312
Oregon	105	100	160	365
Pennsylvania	993	672	836	2,501
Rhode Island	35	31	52	118
South Carolina	116	92	163	371
South Dakota	19	16	33	68
Tennessee	600	293	408	1,301
Texas	1,452	931	1,489	3,873
Utah	146	100	137	382
Vermont	53	26	37	115
Virginia	593	290	460	1,343
Washington	344	203	386	934
West Virginia	28	33	53	114
Wisconsin	145	141	252	538
Wyoming	39	25	34	98
U.S. Total	**23,286**	**13,313**	**19,296**	**55,895**

Source: PwC calculations using the IMPLAN modeling system (2013 database).

Appendix B: Detailed Congressional District Results

The Economic Contribution of the Personal Care Products Industry in Alabama, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
Alabama	**31,290**	**47,770**	**$710**	**$1,407**	**$830**	**$2,150**
AL-1	5,110	7,360	$76	$165	$75	$254
AL-2	7,460	11,240	$193	$340	$325	$604
AL-3	3,930	5,940	$83	$154	$95	$233
AL-4	2,330	3,930	$44	$104	$42	$161
AL-5	3,780	5,870	$103	$191	$97	$265
AL-6	5,230	7,710	$133	$260	$123	$352
AL-7	3,460	5,710	$79	$192	$74	$281

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in Alaska, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
Alaska	**2,310**	**4,350**	**$72**	**$198**	**$81**	**$393**
AK-1 (At-Large)	2,310	4,350	$72	$198	$81	$393

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in Arizona, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
Arizona	**32,670**	**58,540**	**$1,059**	**$2,261**	**$1,446**	**$3,597**
AZ-1	2,400	4,720	$78	$169	$102	$306
AZ-2	3,270	5,730	$111	$203	$118	$292
AZ-3	1,360	3,280	$44	$130	$53	$211
AZ-4	1,700	3,090	$51	$101	$62	$171
AZ-5	3,190	5,930	$110	$239	$170	$400
AZ-6	10,940	16,160	$343	$597	$542	$979
AZ-7	2,180	5,480	$70	$251	$79	$377
AZ-8	3,050	4,740	$97	$175	$103	$244
AZ-9	4,590	9,390	$155	$397	$216	$616

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in Arkansas, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
Arkansas	**22,200**	**37,160**	**$620**	**$1,280**	**$1,123**	**$2,354**
AR-1	2,040	3,910	$49	$114	$64	$200
AR-2	12,870	20,520	$400	$746	$820	$1,465
AR-3	5,580	9,320	$137	$321	$205	$523
AR-4	1,710	3,420	$34	$99	$34	$167

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in California, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
California	**240,150**	**415,680**	**$7,363**	**$17,860**	**$10,539**	**$28,995**
CA-1	2,700	5,110	$66	$178	$79	$286
CA-2	4,890	8,750	$169	$364	$204	$555
CA-3	2,870	5,460	$80	$251	$83	$381
CA-4	5,180	8,020	$139	$265	$147	$395
CA-5	3,740	6,250	$105	$237	$113	$373
CA-6	6,560	9,250	$166	$312	$255	$501
CA-7	3,830	6,040	$77	$196	$79	$286
CA-8	1,950	3,330	$37	$96	$38	$158
CA-9	1,470	3,230	$47	$131	$53	$206
CA-10	1,180	2,820	$47	$129	$46	$193
CA-11	6,940	10,570	$213	$441	$291	$725
CA-12	4,960	9,890	$205	$719	$202	$932
CA-13	4,690	8,350	$139	$370	$204	$576
CA-14	3,760	6,680	$89	$406	$94	$610
CA-15	4,280	7,440	$131	$347	$192	$569
CA-16	1,370	3,270	$37	$129	$37	$198
CA-17	3,810	6,980	$105	$426	$107	$604
CA-18	5,870	9,170	$167	$517	$166	$729
CA-19	3,540	5,730	$103	$255	$102	$352
CA-20	2,330	4,650	$66	$186	$67	$284
CA-21	700	2,470	$24	$120	$24	$209
CA-22	1,860	3,810	$52	$137	$53	$205
CA-23	2,010	3,930	$61	$162	$59	$261
CA-24	4,150	7,430	$126	$294	$147	$465
CA-25	5,150	11,380	$224	$570	$491	$1,115
CA-26	4,020	8,590	$152	$395	$267	$708
CA-27	4,630	7,700	$125	$291	$140	$421
CA-28	8,350	13,880	$248	$589	$346	$955

The Economic Impact of the Personal Care Products Industry in California, 2013 (continued)

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
CA-29	2,880	7,780	$144	$447	$416	$948
CA-30	7,540	14,210	$240	$638	$408	$1,112
CA-31	2,950	5,060	$55	$147	$57	$231
CA-32	13,180	17,770	$418	$675	$761	$1,211
CA-33	9,440	15,380	$261	$617	$281	$947
CA-34	5,290	8,820	$163	$374	$270	$618
CA-35	4,450	7,960	$112	$280	$194	$505
CA-36	2,340	4,120	$59	$124	$61	$195
CA-37	3,130	6,510	$91	$307	$120	$524
CA-38	3,660	6,910	$112	$295	$171	$484
CA-39	8,630	12,770	$280	$523	$442	$861
CA-40	2,330	4,470	$74	$193	$128	$329
CA-41	2,670	5,470	$80	$196	$139	$352
CA-42	5,490	8,670	$144	$274	$168	$434
CA-43	5,660	13,350	$243	$690	$605	$1,363
CA-44	8,100	10,590	$261	$407	$491	$776
CA-45	5,090	9,660	$173	$457	$221	$742
CA-46	4,140	7,400	$138	$332	$150	$465
CA-47	5,470	8,930	$170	$372	$237	$627
CA-48	7,910	12,000	$260	$494	$309	$717
CA-49	8,350	13,080	$265	$544	$345	$861
CA-50	4,260	5,950	$126	$207	$172	$332
CA-51	1,040	2,230	$32	$92	$33	$146
CA-52	5,570	9,780	$160	$400	$164	$586
CA-53	3,790	6,650	$108	$261	$107	$376

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics. Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.

(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.

(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in Colorado, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
Colorado	**28,300**	**51,190**	**$951**	**$2,154**	**$1,181**	**$3,261**
CO-1	4,740	9,030	$175	$484	$190	$660
CO-2	4,270	8,140	$144	$322	$168	$501
CO-3	3,540	6,010	$105	$203	$132	$320
CO-4	3,050	6,980	$125	$318	$195	$543
CO-5	2,960	5,290	$87	$184	$94	$276
CO-6	5,710	9,490	$196	$413	$254	$614
CO-7	4,030	6,250	$118	$229	$148	$347

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in Connecticut, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
Connecticut	**22,800**	**38,530**	**$847**	**$1,881**	**$1,180**	**$2,976**
CT-1	2,550	5,110	$105	$280	$117	$443
CT-2	7,450	11,230	$266	$453	$448	$811
CT-3	2,960	5,990	$111	$290	$153	$472
CT-4	6,350	10,250	$237	$581	$317	$835
CT-5	3,480	5,950	$127	$277	$144	$414

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in Delaware, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
Delaware	**5,690**	**9,110**	**$168**	**$360**	**$280**	**$681**
DE-1 (At-Large)	5,690	9,110	$168	$360	$280	$681

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in the District of Columbia, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
District of Columbia	**4,520**	**7,180**	**$160**	**$407**	**$283**	**$659**
DC-1 (At-Large)	4,520	7,180	$160	$407	$283	$659

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in Florida, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
Florida	**129,660**	**220,470**	**$3,290**	**$7,378**	**$4,555**	**$11,750**
FL-1	3,580	6,100	$97	$194	$105	$290
FL-2	2,830	5,170	$84	$172	$89	$256
FL-3	2,000	3,850	$61	$128	$68	$200
FL-4	6,730	12,050	$159	$413	$237	$661
FL-5	5,180	10,100	$136	$375	$229	$638
FL-6	4,470	8,770	$122	$288	$256	$573
FL-7	4,220	7,070	$85	$217	$99	$331
FL-8	3,910	6,430	$115	$216	$136	$323
FL-9	2,370	4,260	$48	$133	$54	$202
FL-10	3,750	7,010	$84	$221	$95	$334
FL-11	2,930	4,640	$78	$138	$92	$220
FL-12	4,000	5,920	$111	$189	$135	$289
FL-13	5,040	10,760	$148	$411	$240	$685
FL-14	4,500	8,600	$130	$355	$166	$543
FL-15	2,640	5,000	$69	$180	$75	$267
FL-16	5,840	9,220	$145	$275	$160	$405
FL-17	1,740	3,670	$52	$125	$70	$227
FL-18	4,510	7,030	$92	$194	$102	$302
FL-19	5,320	8,580	$161	$298	$174	$420
FL-20	5,800	10,180	$145	$359	$221	$581
FL-21	5,090	7,350	$104	$206	$119	$301
FL-22	13,160	19,910	$349	$687	$561	$1,111

The Economic Impact of the Personal Care Products Industry in Florida, 2013 (continued)

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
FL-23	5,000	8,100	$105	$243	$119	$360
FL-24	6,710	11,730	$171	$412	$285	$686
FL-25	4,010	7,810	$118	$298	$215	$527
FL-26	5,800	8,420	$134	$253	$193	$409
FL-27	8,530	12,750	$189	$401	$261	$612

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in Georgia, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
Georgia	**79,570**	**126,210**	**$1,786**	**$4,043**	**$2,465**	**$6,523**
GA-1	3,570	6,930	$104	$239	$158	$415
GA-2	3,310	5,590	$58	$153	$67	$241
GA-3	7,610	11,030	$144	$260	$196	$438
GA-4	5,340	8,390	$109	$245	$178	$433
GA-5	7,210	11,990	$171	$503	$237	$813
GA-6	11,910	18,490	$300	$691	$403	$1,028
GA-7	6,870	10,310	$147	$337	$210	$531
GA-8	2,780	4,790	$56	$128	$76	$223
GA-9	4,920	7,630	$101	$207	$146	$352
GA-10	4,620	6,840	$91	$168	$125	$286
GA-11	8,680	13,900	$229	$521	$276	$757
GA-12	3,760	5,980	$88	$174	$127	$299
GA-13	4,620	7,580	$95	$234	$138	$393
GA-14	4,370	6,750	$93	$185	$130	$313

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in Hawaii, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
Hawaii	**5,640**	**10,290**	**$175**	**$412**	**$183**	**$602**
HI-1	3,430	5,900	$114	$241	$112	$331
HI-2	2,210	4,400	$61	$171	$71	$271

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in Idaho, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
Idaho	**11,690**	**20,270**	**$364**	**$710**	**$517**	**$1,115**
ID-1	3,130	5,550	$80	$171	$78	$242
ID-2	8,560	14,730	$284	$540	$438	$874

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in Illinois, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
Illinois	**111,050**	**185,610**	**$3,307**	**$7,590**	**$4,635**	**$12,011**
IL-1	4,490	8,060	$144	$349	$216	$565
IL-2	2,090	3,750	$53	$135	$61	$211
IL-3	7,430	11,810	$230	$483	$351	$787
IL-4	8,100	13,020	$296	$599	$522	$1,023
IL-5	10,630	17,180	$333	$740	$500	$1,160
IL-6	7,840	12,500	$223	$495	$270	$728
IL-7	12,740	21,510	$347	$1,005	$469	$1,455
IL-8	7,640	12,430	$202	$502	$234	$728
IL-9	10,050	15,000	$269	$569	$353	$849
IL-10	9,070	14,220	$276	$624	$388	$978
IL-11	5,720	10,160	$185	$432	$286	$732
IL-12	2,870	5,220	$70	$161	$75	$270
IL-13	4,000	7,000	$108	$242	$130	$401
IL-14	5,790	9,440	$183	$363	$230	$572
IL-15	4,300	8,050	$139	$280	$258	$557
IL-16	2,850	5,460	$102	$210	$123	$349
IL-17	2,080	4,480	$51	$164	$56	$264
IL-18	3,360	6,320	$94	$236	$111	$380

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in Indiana, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
Indiana	**45,890**	**74,640**	**$1,235**	**$2,567**	**$2,018**	**$4,579**
IN-1	5,400	8,100	$130	$248	$195	$453
IN-2	9,050	14,520	$253	$510	$557	$1,006
IN-3	2,920	5,490	$75	$184	$85	$284
IN-4	4,310	7,130	$139	$248	$188	$407
IN-5	6,340	9,970	$175	$353	$169	$482
IN-6	2,370	4,380	$59	$138	$63	$216
IN-7	8,000	12,310	$204	$468	$478	$997
IN-8	3,320	6,070	$85	$208	$126	$380
IN-9	4,180	6,670	$114	$208	$158	$353

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in Iowa, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
Iowa	**28,170**	**47,800**	**$1,096**	**$2,001**	**$1,680**	**$3,282**
IA-1	2,920	6,100	$89	$238	$108	$377
IA-2	6,690	13,540	$314	$611	$642	$1,178
IA-3	4,190	7,560	$119	$302	$113	$427
IA-4	14,360	20,600	$575	$850	$818	$1,300

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in Kansas, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
Kansas	**13,750**	**23,900**	**$403**	**$891**	**$473**	**$1,319**
KS-1	2,720	5,210	$134	$237	$125	$317
KS-2	1,950	3,710	$40	$113	$40	$177
KS-3	6,160	10,040	$172	$388	$249	$601
KS-4	2,920	4,930	$57	$154	$58	$225

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in Kentucky, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
Kentucky	**23,420**	**39,750**	**$654**	**$1,374**	**$982**	**$2,277**
KY-1	1,900	3,700	$43	$115	$42	$182
KY-2	4,280	7,280	$118	$236	$201	$430
KY-3	4,300	7,120	$117	$271	$113	$365
KY-4	8,150	13,260	$269	$497	$526	$924
KY-5	1,230	2,520	$22	$72	$20	$119
KY-6	3,560	5,860	$86	$184	$80	$255

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in Louisiana, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
Louisiana	**31,540**	**48,890**	**$812**	**$1,635**	**$1,129**	**$2,913**
LA-1	5,240	8,110	$157	$300	$167	$441
LA-2	4,600	7,370	$110	$263	$138	$517
LA-3	5,240	8,300	$158	$307	$213	$561
LA-4	3,340	5,450	$83	$175	$89	$295
LA-5	4,700	7,900	$130	$263	$328	$591
LA-6	8,420	11,760	$175	$328	$194	$509

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in Maine, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
Maine	**6,210**	**11,360**	**$175**	**$398**	**$200**	**$580**
ME-1	3,920	7,010	$114	$256	$133	$369
ME-2	2,280	4,350	$60	$142	$67	$210

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in Maryland, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
Maryland	**50,030**	**78,080**	**$1,602**	**$3,173**	**$2,788**	**$5,588**
MD-1	7,360	11,750	$258	$450	$492	$866
MD-2	8,490	13,850	$300	$600	$677	$1,212
MD-3	7,700	12,320	$254	$540	$456	$946
MD-4	3,670	5,590	$112	$209	$159	$341
MD-5	5,080	7,370	$145	$247	$195	$408
MD-6	3,530	5,570	$105	$221	$113	$312
MD-7	6,900	11,050	$236	$488	$488	$912
MD-8	7,310	10,560	$192	$418	$209	$592

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in Massachusetts, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
Massachusetts	**39,980**	**67,280**	**$1,393**	**$3,147**	**$1,744**	**$4,668**
MA-1	3,110	5,550	$93	$211	$120	$335
MA-2	2,960	5,440	$103	$229	$106	$336
MA-3	3,980	6,570	$143	$311	$205	$485
MA-4	6,920	11,080	$240	$486	$357	$774
MA-5	3,850	6,470	$125	$316	$136	$452
MA-6	6,710	11,070	$256	$524	$368	$827
MA-7	4,070	7,090	$148	$434	$155	$573
MA-8	4,500	7,670	$159	$402	$164	$547
MA-9	3,880	6,330	$126	$234	$131	$339

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in Michigan, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
Michigan	**69,640**	**108,470**	**$1,579**	**$3,415**	**$1,971**	**$5,252**
MI-1	3,690	5,980	$81	$163	$88	$254
MI-2	7,960	13,410	$229	$464	$403	$843
MI-3	5,340	8,740	$120	$279	$173	$452
MI-4	3,120	5,110	$61	$140	$68	$217
MI-5	4,750	6,920	$70	$154	$87	$246
MI-6	3,640	6,010	$75	$178	$83	$277
MI-7	4,380	6,770	$110	$216	$118	$326
MI-8	5,960	8,720	$133	$262	$155	$392
MI-9	4,770	7,590	$114	$261	$132	$380
MI-10	3,750	5,600	$90	$166	$97	$252
MI-11	11,200	15,700	$257	$505	$291	$691
MI-12	5,800	8,500	$122	$262	$135	$373
MI-13	1,570	3,020	$27	$114	$32	$178
MI-14	3,700	6,390	$90	$251	$108	$371

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in Minnesota, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
Minnesota	**38,510**	**70,310**	**$1,263**	**$2,985**	**$1,734**	**$4,582**
MN-1	2,910	6,100	$107	$249	$135	$370
MN-2	4,250	7,200	$117	$256	$131	$411
MN-3	7,950	13,330	$255	$601	$340	$881
MN-4	5,130	9,220	$137	$368	$190	$561
MN-5	8,520	15,670	$345	$826	$521	$1,236
MN-6	5,900	10,480	$188	$394	$303	$667
MN-7	1,800	4,120	$55	$151	$55	$225
MN-8	2,050	4,200	$58	$140	$58	$231

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in Mississippi, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
Mississippi	**19,380**	**29,700**	**$423**	**$844**	**$617**	**$1,376**
MS-1	7,360	11,090	$187	$328	$316	$580
MS-2	2,830	4,560	$46	$119	$54	$182
MS-3	5,360	8,290	$112	$239	$163	$379
MS-4	3,830	5,760	$78	$158	$84	$235

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in Missouri, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
Missouri	**41,690**	**71,690**	**$1,200**	**$2,645**	**$1,714**	**$4,225**
MO-1	8,580	15,250	$274	$688	$544	$1,207
MO-2	10,870	16,900	$306	$633	$411	$941
MO-3	5,500	9,370	$165	$317	$246	$538
MO-4	3,080	5,380	$90	$168	$112	$271
MO-5	4,220	7,420	$102	$281	$121	$416
MO-6	3,890	6,660	$117	$225	$117	$332
MO-7	4,400	7,820	$112	$240	$130	$370
MO-8	1,140	2,880	$32	$93	$31	$151

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in Montana, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
Montana	**4,520**	**7,910**	**$128**	**$260**	**$123**	**$365**
MT-1 (At-Large)	4,520	7,910	$128	$260	$123	$365

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in Nebraska, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
Nebraska	**10,780**	**18,420**	**$343**	**$722**	**$481**	**$1,159**
NE-1	3,040	5,040	$66	$156	$93	$267
NE-2	5,330	9,000	$205	$400	$306	$633
NE-3	2,410	4,380	$71	$167	$83	$260

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in Nevada, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
Nevada	**14,300**	**24,390**	**$421**	**$896**	**$494**	**$1,381**
NV-1	4,040	7,470	$116	$278	$140	$414
NV-2	3,590	6,340	$117	$247	$133	$394
NV-3	4,540	7,170	$130	$254	$155	$383
NV-4	2,130	3,410	$58	$118	$66	$189

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in New Hampshire, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
New Hampshire	**7,320**	**12,830**	**$252**	**$534**	**$253**	**$727**
NH-1	3,430	6,000	$123	$254	$113	$338
NH-2	3,890	6,830	$129	$280	$140	$389

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in New Jersey, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
New Jersey	**107,300**	**182,260**	**$3,977**	**$8,823**	**$7,101**	**$15,184**
NJ-1	3,110	6,040	$91	$236	$113	$374
NJ-2	3,040	5,870	$91	$212	$108	$366
NJ-3	3,890	7,160	$123	$282	$148	$450
NJ-4	8,840	14,770	$288	$580	$517	$1,075
NJ-5	7,640	12,680	$250	$560	$370	$879
NJ-6	14,330	25,030	$556	$1,262	$1,188	$2,349
NJ-7	19,380	31,120	$810	$1,627	$1,434	$2,771
NJ-8	3,200	6,320	$80	$311	$127	$497
NJ-9	10,660	18,700	$403	$915	$798	$1,638
NJ-10	5,700	9,650	$195	$461	$359	$807
NJ-11	16,900	27,520	$724	$1,516	$1,239	$2,475
NJ-12	10,600	17,400	$367	$861	$701	$1,503

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in New Mexico, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
New Mexico	**7,020**	**12,190**	**$211**	**$430**	**$238**	**$673**
NM-1	3,180	5,260	$95	$182	$104	$268
NM-2	1,240	2,570	$36	$96	$38	$159
NM-3	2,600	4,360	$80	$152	$96	$247

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in New York, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
New York	**158,100**	**251,650**	**$5,004**	**$11,451**	**$9,048**	**$20,132**
NY-1	9,920	14,700	$323	$585	$709	$1,220
NY-2	12,440	19,310	$432	$843	$975	$1,732
NY-3	11,460	17,500	$340	$706	$676	$1,349
NY-4	5,740	8,740	$147	$321	$250	$562
NY-5	2,040	3,290	$30	$89	$41	$157
NY-6	5,620	7,470	$69	$145	$92	$269
NY-7	4,100	6,850	$116	$302	$135	$452
NY-8	2,120	3,380	$29	$79	$38	$152
NY-9	2,650	3,840	$37	$82	$48	$150
NY-10	8,740	15,280	$361	$1,203	$394	$1,580
NY-11	4,930	6,750	$82	$155	$102	$267
NY-12	20,540	31,800	$1,052	$2,544	$1,495	$3,567
NY-13	1,480	2,480	$54	$128	$59	$181
NY-14	8,170	12,070	$191	$371	$463	$833
NY-15	1,760	2,960	$29	$91	$53	$170
NY-16	3,330	4,890	$61	$146	$81	$242
NY-17	13,300	20,300	$460	$958	$985	$1,838
NY-18	11,690	18,490	$350	$713	$1,075	$1,752
NY-19	2,900	5,180	$76	$171	$125	$334
NY-20	3,140	5,590	$81	$216	$93	$355
NY-21	2,540	4,960	$82	$187	$144	$367
NY-22	1,750	3,580	$53	$133	$60	$232

The Economic Impact of the Personal Care Products Industry in New York, 2013 (continued)

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
NY-23	6,550	10,860	$209	$412	$517	$904
NY-24	2,370	4,840	$81	$205	$92	$349
NY-25	3,130	5,840	$87	$238	$98	$378
NY-26	2,990	5,830	$88	$240	$152	$438
NY-27	2,700	4,870	$85	$188	$97	$302

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in North Carolina, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
North Carolina	**94,620**	**161,030**	**$2,905**	**$6,075**	**$5,780**	**$11,586**
NC-1	8,400	14,160	$265	$518	$615	$1,104
NC-2	13,770	22,300	$451	$821	$1,074	$1,756
NC-3	3,010	5,730	$84	$188	$93	$301
NC-4	9,460	15,220	$296	$609	$547	$1,107
NC-5	3,010	6,320	$85	$233	$105	$366
NC-6	11,720	19,760	$378	$748	$968	$1,647
NC-7	8,180	13,230	$263	$456	$569	$985
NC-8	2,440	4,970	$68	$173	$104	$300
NC-9	7,790	12,900	$208	$537	$249	$769
NC-10	3,230	6,200	$79	$191	$101	$318
NC-11	2,870	5,560	$59	$152	$67	$263
NC-12	9,430	16,740	$315	$765	$594	$1,360
NC-13	11,300	17,950	$354	$683	$696	$1,310

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in North Dakota, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
North Dakota	**3,890**	**6,680**	**$122**	**$272**	**$177**	**$438**
ND-1 (At-Large)	3,890	6,680	$122	$272	$177	$438

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in Ohio, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
Ohio	**97,600**	**170,590**	**$3,020**	**$6,696**	**$5,185**	**$11,657**
OH-1	15,250	25,690	$627	$1,249	$1,448	$2,444
OH-2	9,210	15,270	$301	$643	$528	$1,110
OH-3	2,560	5,910	$54	$247	$57	$370
OH-4	4,910	8,820	$155	$322	$280	$618
OH-5	2,880	6,270	$85	$235	$84	$356
OH-6	3,400	6,140	$98	$203	$149	$380
OH-7	4,070	7,590	$127	$270	$157	$442
OH-8	6,790	11,540	$210	$417	$352	$739
OH-9	3,360	6,210	$85	$235	$114	$410
OH-10	3,610	6,870	$96	$248	$119	$391
OH-11	7,210	12,810	$212	$553	$387	$936
OH-12	5,020	9,010	$139	$330	$147	$481
OH-13	3,820	7,080	$101	$247	$163	$423
OH-14	13,430	20,980	$414	$780	$781	$1,437
OH-15	3,770	7,390	$86	$264	$89	$397
OH-16	8,320	13,010	$231	$454	$331	$722

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in Oklahoma, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
Oklahoma	**16,640**	**28,470**	**$410**	**$991**	**$491**	**$1,512**
OK-1	5,430	8,400	$111	$289	$131	$419
OK-2	1,630	3,210	$40	$95	$40	$152
OK-3	3,080	5,400	$84	$179	$101	$290
OK-4	2,930	5,180	$82	$169	$109	$278
OK-5	3,570	6,280	$94	$260	$109	$373

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in Oregon, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
Oregon	**17,770**	**31,700**	**$542**	**$1,203**	**$565**	**$1,805**
OR-1	3,930	6,980	$132	$308	$135	$529
OR-2	3,000	5,360	$71	$157	$77	$243
OR-3	4,470	8,040	$146	$338	$152	$464
OR-4	2,290	4,350	$70	$152	$69	$216
OR-5	4,080	6,960	$123	$248	$132	$352

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in Pennsylvania, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
Pennsylvania	**90,290**	**157,910**	**$2,682**	**$6,506**	**$3,945**	**$10,331**
PA-1	3,060	5,460	$70	$264	$95	$381
PA-2	3,420	6,000	$68	$314	$81	$422
PA-3	2,260	4,650	$70	$183	$76	$280
PA-4	2,870	6,080	$76	$241	$86	$365
PA-5	1,930	4,170	$59	$153	$65	$240
PA-6	5,010	8,440	$150	$376	$180	$542
PA-7	5,650	9,340	$163	$398	$184	$576
PA-8	20,080	33,760	$699	$1,477	$1,336	$2,639
PA-9	2,110	4,360	$70	$164	$87	$267
PA-10	4,460	7,650	$138	$264	$207	$455
PA-11	2,860	5,470	$78	$207	$109	$342
PA-12	3,500	6,520	$96	$266	$110	$397
PA-13	3,610	6,070	$85	$249	$101	$367
PA-14	3,420	6,690	$85	$310	$100	$442
PA-15	4,000	7,350	$105	$287	$129	$433
PA-16	13,460	21,000	$423	$797	$663	$1,299
PA-17	4,920	8,510	$143	$300	$215	$501
PA-18	3,680	6,380	$104	$256	$121	$385

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in Rhode Island, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
Rhode Island	**5,170**	**8,640**	**$146**	**$333**	**$158**	**$487**
RI-1	2,200	3,720	$59	$145	$60	$206
RI-2	2,970	4,920	$87	$188	$99	$281

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in South Carolina, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
South Carolina	**23,270**	**37,970**	**$596**	**$1,222**	**$660**	**$1,807**
SC-1	5,100	7,540	$149	$251	$164	$348
SC-2	3,650	5,720	$87	$173	$94	$258
SC-3	3,190	5,050	$67	$143	$81	$229
SC-4	3,960	6,480	$106	$225	$118	$328
SC-5	2,310	3,960	$55	$125	$60	$185
SC-6	2,590	4,910	$68	$172	$74	$263
SC-7	2,460	4,310	$65	$133	$70	$196

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in South Dakota, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
South Dakota	**3,710**	**6,680**	**$121**	**$260**	**$106**	**$351**
SD-1 (At-Large)	3,710	6,680	$121	$260	$106	$351

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in Tennessee, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
Tennessee	**56,980**	**95,100**	**$1,707**	**$3,584**	**$2,591**	**$5,718**
TN-1	4,880	8,360	$135	$274	$195	$445
TN-2	5,520	9,300	$163	$342	$179	$480
TN-3	3,200	5,890	$80	$211	$82	$304
TN-4	12,680	20,340	$433	$738	$895	$1,462
TN-5	5,750	10,270	$186	$494	$180	$632
TN-6	2,630	5,250	$88	$197	$123	$317
TN-7	3,350	5,980	$133	$271	$128	$356
TN-8	9,510	14,460	$221	$443	$314	$690
TN-9	9,450	15,240	$268	$613	$494	$1,033

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in Texas, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
Texas	**155,520**	**269,180**	**$5,049**	**$11,125**	**$6,955**	**$18,296**
TX-1	2,200	4,560	$59	$167	$63	$288
TX-2	10,650	16,670	$388	$825	$591	$1,308
TX-3	5,640	9,140	$169	$362	$199	$537
TX-4	1,990	4,270	$63	$150	$70	$251
TX-5	3,440	6,210	$117	$250	$222	$464
TX-6	4,940	8,350	$180	$329	$249	$538
TX-7	6,770	11,010	$240	$550	$238	$741
TX-8	3,580	5,950	$134	$244	$137	$348
TX-9	2,000	4,080	$68	$191	$79	$283
TX-10	4,860	7,820	$146	$286	$152	$411
TX-11	2,010	4,580	$65	$210	$67	$373
TX-12	5,080	8,850	$195	$388	$193	$558
TX-13	2,210	4,780	$61	$174	$77	$344
TX-14	2,580	4,780	$77	$179	$83	$437
TX-15	2,850	5,190	$57	$132	$70	$219
TX-16	3,350	5,750	$61	$147	$91	$264
TX-17	3,000	5,720	$81	$195	$83	$314
TX-18	6,560	11,390	$242	$625	$452	$1,095
TX-19	2,090	4,350	$56	$148	$60	$262
TX-20	2,950	5,160	$81	$181	$88	$266
TX-21	6,780	11,320	$188	$395	$216	$595
TX-22	6,580	9,750	$196	$325	$222	$505
TX-23	2,510	4,670	$65	$159	$68	$249
TX-24	13,950	22,980	$497	$1,050	$794	$1,694
TX-25	5,410	8,760	$163	$306	$191	$467
TX-26	2,350	4,350	$103	$189	$114	$277
TX-27	2,330	4,620	$61	$167	$65	$339
TX-28	1,800	3,400	$40	$99	$46	$163

The Economic Impact of the Personal Care Products Industry in Texas, 2013 (continued)

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
TX-29	1,120	2,650	$40	$160	$42	$282
TX-30	7,610	12,840	$281	$613	$531	$1,068
TX-31	2,890	5,040	$92	$189	$94	$273
TX-32	8,020	12,640	$257	$566	$356	$859
TX-33	7,150	12,420	$290	$596	$679	$1,209
TX-34	1,270	2,930	$20	$73	$25	$131
TX-35	3,500	6,290	$100	$231	$115	$361
TX-36	3,500	5,890	$115	$273	$134	$520

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in Utah, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
Utah	**17,440**	**30,780**	**$452**	**$1,045**	**$669**	**$1,772**
UT-1	4,190	7,210	$117	$237	$175	$410
UT-2	6,010	11,160	$148	$386	$290	$732
UT-3	3,660	6,350	$109	$222	$120	$329
UT-4	3,570	6,060	$77	$200	$85	$301

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in Vermont, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
Vermont	**4,300**	**7,690**	**$142**	**$289**	**$175**	**$429**
VT-1 (At-Large)	4,300	7,690	$142	$289	$175	$429

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in Virginia, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
Virginia	**53,120**	**87,780**	**$1,739**	**$3,617**	**$2,648**	**$5,926**
VA-1	3,650	5,810	$129	$216	$137	$316
VA-2	4,200	6,440	$107	$211	$120	$313
VA-3	3,020	5,530	$97	$259	$159	$453
VA-4	2,490	4,230	$80	$159	$87	$242
VA-5	7,400	12,590	$230	$447	$521	$934
VA-6	8,880	15,670	$295	$592	$689	$1,231
VA-7	4,730	7,990	$152	$328	$202	$517
VA-8	5,520	8,390	$196	$429	$212	$560
VA-9	1,920	3,660	$53	$127	$89	$238
VA-10	6,020	9,450	$201	$431	$219	$586
VA-11	5,290	8,030	$198	$419	$212	$538

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in Washington, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
Washington	**35,000**	**59,860**	**$1,269**	**$2,652**	**$1,549**	**$4,078**
WA-1	6,010	9,510	$209	$430	$316	$722
WA-2	3,230	5,280	$99	$191	$101	$306
WA-3	2,160	4,120	$122	$210	$119	$297
WA-4	1,260	3,150	$49	$137	$49	$207
WA-5	2,000	4,050	$77	$164	$72	$240
WA-6	2,860	4,910	$93	$179	$92	$263
WA-7	6,540	10,540	$226	$496	$259	$703
WA-8	2,710	4,470	$97	$194	$104	$287
WA-9	5,860	9,940	$225	$509	$361	$846
WA-10	2,380	3,880	$74	$141	$74	$208

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in West Virginia, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
West Virginia	**5,840**	**10,110**	**$161**	**$354**	**$169**	**$536**
WV-1	2,050	3,620	$64	$135	$57	$193
WV-2	2,510	4,160	$69	$143	$87	$221
WV-3	1,280	2,330	$28	$76	$25	$123

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in Wisconsin, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
Wisconsin	**28,150**	**48,560**	**$778**	**$1,766**	**$784**	**$2,494**
WI-1	4,270	6,640	$122	$237	$118	$326
WI-2	4,780	7,810	$123	$271	$126	$387
WI-3	2,910	5,310	$79	$180	$85	$270
WI-4	2,820	5,030	$66	$198	$66	$269
WI-5	4,300	7,250	$134	$285	$138	$392
WI-6	3,240	5,770	$101	$221	$97	$311
WI-7	2,700	5,000	$76	$168	$75	$243
WI-8	3,140	5,740	$78	$205	$78	$296

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

The Economic Impact of the Personal Care Products Industry in Wyoming, 2013

State / Congressional District	Employment (Jobs)[1]		Labor Income ($ millions)[2]		GDP ($ millions)	
	Direct	Total[3]	Direct	Total[3]	Direct	Total[3]
Wyoming	**3,230**	**5,240**	**$94**	**$192**	**$149**	**$390**
WY-1 (At-Large)	3,230	5,240	$94	$192	$149	$390

Source: PwC calculations using the IMPLAN modeling system (2013 database) and data from the US Bureau of Economic Analysis, the Census Bureau, and the Bureau of Labor Statistics.
Details may not add to totals due to rounding.

(1) Employment is defined as the number of payroll and self-employed jobs, including part-time jobs.
(2) Labor income is defined as annual wages and salaries and benefits as well as proprietors' income.
(3) Total impact includes direct, indirect and induced impacts.

Appendix C: Data Sources and Methodology

This appendix describes the data sources and methodology used to derive the results for the study. It first discusses the data sources PwC utilized to develop estimates of the US retail industry's direct economic impacts. It then describes the development of the indirect and induced economic impact estimates.

I. Data Sources

PwC developed its estimates of the US personal care products industry's economic impacts using data from a number of government and private sources:

- *Regional Economic Accounts* – This data source, produced by the US Bureau of Economic Analysis ("BEA"), provides information on employment and compensation by industry at the state and local levels, as well as state-level GDP by industry. BEA produces this information by compiling information collected by other organizations, both governmental and private. Industry classifications are based on 2007 NAICS codes. Employment in the *Regional Economic Accounts* includes both full-time and part-time employment. Unlike QCEW (discussed below), employment figures in the *Regional Economic Accounts* database include self-employed individuals. Data from this source pertain to employment, labor income, and GDP for 2013.

- *Quarterly Census of Employment and Wages ("QCEW")* – This data source, produced by the US Bureau of Labor Statistics ("BLS"), provides comprehensive information on employment and wages at the national, state, and local levels for workers covered by state unemployment insurance programs. In addition to data on employment and wages, QCEW also reports counts of establishments with paid employees by detailed industry sector. Industry classifications are based on the 2007 North American Industry Classification System ("NAICS"). Data from this source pertain to 2013 employment and wages.

- *Nonemployer Statistics* ("*NES*") – Released annually by the US Census Bureau, NES contains data on the number of establishments that have no paid employees and annual business receipts of $1,000 or more. Nonemployers are typically self-employed individuals or partnerships operating unincorporated businesses. Data are reported at the national, state, and county levels and by detailed industry, based on 2007 NAICS codes. Data from this source pertain to nonemployer operations in 2013.

- *Zip Code Business Patterns* ("*ZCBP*") – Zip Code Business Patterns, released annually by the US Census Bureau, provides counts of establishments by employment-size class (e.g., fewer than 5 employees, 5 to 10, etc.) at the 6-digit NAICS level. Data from this source pertain to 2013.

- *Election Data Services five-digit ZIP+DISTRICT file* ("*EDS*") – Election Data Services Inc. is a political consulting firm specializing in redistricting, election administration, and the analysis and presentation of census and political data. EDS's ZIP+DISTRICT data files link postal zip codes to congressional and legislative districts. The EDS data, along with data from the US Postal Service, were used to develop mappings of zip codes to congressional districts.

II. Estimates of Direct Economic Impacts

PwC has estimated the US personal care products industry's direct economic impacts in terms of employment and labor income (including wages and salaries and benefits as well as proprietors' income) in the manufacturing and services segments using the data sources described above and the IMPLAN modeling system. As discussed below, estimates of GDP and total taxes paid by the industry, as well as estimates of the direct impacts of the distribution segment were developed using the IMPLAN modeling system.

Employment and Labor Income

This study uses data on employment, employee compensation, and proprietors' income, by industry from the Bureau of Economic Analysis' *Regional Economic Accounts* and data on employment and wages and salaries from the Bureau of Labor Statistics' *Quarterly Census of Employment and Wages* to develop our estimates of the direct economic impact of the US personal care products industry.

PwC's employment estimates include both full-time and part-time workers as well as self-employed individuals and business owners. The *State Annual Personal Income and Employment* data set published as part of the BEA's *Regional Economic Accounts* is the only source on total employment including self-employed individuals by industry.

Because the published BEA data is not available at the detailed (6-digit NAICS) industry level, PwC obtained data on paid employment and employee compensation in the manufacturing and services segments from the US Bureau of Labor Statistics. In a limited number of cases, the count of paid employees was suppressed because of the small number of establishments in an industry in a state. Relying on employment counts available for the sector at the national-level and for higher-level industries at the state-level, a two-stage "raking" process was used to estimate the state-level employee count. The raking process uses information from known sectors within a state and across states to impute information for the sectors with suppressed data.[13]

PwC then estimated total self-employment for the more aggregated industry using the BEA data and allocated across the subsectors using data from *Nonemployer Statistics*. For example, self-employment was estimated for NAICS 812 (Personal Care and Laundry Services) and was then allocated across six sub-industries including NAICS 81211 (Hair, Nail, and Skin Care Services) and NAICS 812199 (Other Personal Care Services) using each sub-industries share of nonemployer establishments in 2013.

Direct employment was separately estimated for the US as a whole and for each of the 50 states and the District of Columbia. The state-level estimates were then scaled to match the national level estimates. As discussed in **Section II**, above, certain sub-industries in the personal care products industry have multiple business lines, some of which fall outside of the personal care products industry. In such cases we allocated employment between the personal care products line and other business lines based on the ratio of personal care product sales to total industry sales (see **Table 1**).

A similar methodology was used to estimate labor income at the national and state levels. In particular, employee compensation was obtained from the *Quarterly Census*

[13] Oh, H.L. and Scheuren, F. (1987). Modified Raking Ratio Estimation. Survey Methodology, vol. 13, no. 2, pp. 209-219.

of Employment and Wages and scaled to match BEA totals from employee compensation at the more aggregated industry level.[14] Proprietors' income was then estimated at the more aggregated industry level using the BEA data and allocated to the detailed sectors using data on receipts from *Nonemployer Statistics*.

To develop our congressional district level direct employment estimates, PwC used employment by congressional district from IMPLAN model (developed by IMPLAN using the zip code-to-congressional district mapping obtained from EDS and the ZCBP data from the Census Bureau) to develop district-level allocation percentages. These allocation percentages were used to allocate state-level direct employment impact data across the congressional districts.

I-O models capture the upstream relationships, but downstream impacts on the distribution channel are not reflected in standard economic multipliers. The transportation, wholesaling, and retailing of personal care products to the final consumer could be attributable to the personal care products industry. To capture the economic activity associated with the transportation, wholesaling, and retailing of personal care products, we have relied on sector-specific transportation, wholesale, and retail margins in the IMPLAN model. Based on these margins, we have estimated the direct downstream economic impact associated with this activity at the national, state and congressional district levels.

Other Direct Impacts

Direct GDP and direct taxes paid were estimated at the national and state-levels using PwC's estimates of direct employment and direct labor income and national and state IMPLAN models. State-level estimates were scaled to match the national level estimates.

The same zip code-to-county-to-congressional district mapping described above was used to develop IMPLAN congressional district models. These models were then used to derive our initial estimates of direct labor income, direct GDP, and direct taxes paid for each congressional district. Our initial estimates were then controlled to the state-level estimates.

III. Estimates of Indirect and Induced Economic Impacts

The initial round of output, income, and employment generated by the operations of the personal care products industry leads to successive rounds of re-spending in the chain of production and through the personal consumption spending of industry and supplier employees. Such indirect and induced economic impacts can be measured using various approaches. The most common is multiplier analysis. In broad terms, a multiplier is an index that indicates the overall change in the level of economic activity that results from a given initial change. It effectively adds up all the successive rounds of re-spending, based on a number of assumptions that are embedded in the method of estimation.

There are different methods available for calculating multipliers. The method used in this report is *input-output* analysis. It is the most commonly used approach in regional economic impact studies. The input-output model developed by the IMPLAN Group LLC is one of the best known input-output models for regional economic studies in the

[14] Scaling is necessary due to conceptual and measurement differences between BEA's and BLS's definitions of employee compensation.

United States and is widely used by government, academics and private-sector researchers.[15]

The IMPLAN model is built around an "input-output" table that relates the purchases that each industry has made from other industries to the value of the output of each industry. To meet the demand for goods and services from an industry, purchases are made in other industries according to the patterns recorded in the input-output table. These purchases in turn spark still more purchases by the industry's suppliers, and so on. Additionally, employees and business owners make personal purchases out of the additional income that is generated by this process, sending more new demands rippling through the economy. Multipliers describe these iterations. The Type I multiplier measures the direct and indirect effects of a change in economic activity. It captures the inter-industry effects only, i.e., industries buying from local industries. The Type II (Social Accounting Matrix or SAM) multiplier captures the direct and indirect effects and, in addition, it also reflects induced effects (*i.e.*, changes in spending from households as income increases or decreases due to the changes in production). The indirect and induced impacts by the personal care products industry on other sectors of the economy in terms of employment, labor income (including wages and salaries and benefits as well as proprietors' income), contribution to GDP, and taxes paid were calculated through the multiplier process built in each model.[16]

For this study, PwC built customized IMPLAN input-output models for the national economy and each state or congressional district to calculate the industry's *indirect* and *induced* economic impact in each study area in terms of employment, labor income, GDP, and taxes paid.

Because IMPLAN regional models capture only the indirect and induced effects within a region, the indirect and induced effects crossing state borders ("cross-state spillover effects") are not captured by the IMPLAN state models. PwC quantified the cross-state "spillover effects" and allocated them proportionally to each state. The state indirect and induced effects reported throughout this study include such allocation of the cross-state spillover effects. Similar modeling was performed at the congressional district level to capture spillover effects.

[15] More information on IMPLAN is available at www.implan.com.

[16] Because the IMPLAN models are used for total impact analysis (as opposed to marginal impact analysis) in this study, necessary adjustments are made to the initial indirect and induced impact estimates to prevent double-counting. For instance, any indirect or induced effects from the initial estimates for IMPLAN sectors that are fully mapped to the personal care products industry are removed.