



SNAPSHOT  
SURVEY

# Pricing Changes and Tariffs

**APRIL 2025**  
RESULTS REPORT

## PRICING CHANGES AND TARIFFS

The April 2025 ISPA Snapshot Survey gathered responses from ISPA members to better understand how pricing changes and the potential implementation of new tariffs are currently affecting the industry. The results provide insight into how frequently businesses assess pricing, the degree to which current and potential tariff changes are impacting operations and the proactive steps companies are taking in anticipation of further tariff-related challenges.

Tariffs have been a significant topic across the industry. While 54 percent of spa respondents report minimal impact to date, 62 percent expect tariffs will noticeably affect their business within the next six months. In preparation of potential tariff changes, a total of 55 percent of spa respondents are exploring new domestic vendors, while 40 percent are moving up planned orders with vendors ahead of potential price increases. While the majority of spa have not currently experienced vendor partner price increases in most categories, slightly more than half (58 percent) have received notification that vendor partners who provide textile products (i.e. linens, towels, robes, etc.) plan to pass along price increases or fees to help offset new tariff expenses.

Regarding price changes, most spa respondents (73 percent) are reviewing pricing on an annual basis, while 21 percent evaluate quarterly.

Resource Partners are also taking steps to prepare for potential tariff shifts. More than half (55 percent) are actively exploring new domestic vendors. Currently, 37 percent report feeling a noticeable impact from tariffs, and 48 percent anticipate further impact over the next six months. A total of 45 percent of resource partners have started evaluating or seeking new suppliers.

Over the past six months, 44 percent of resource partners have not made changes to their pricing, and 27 percent do not expect to do so in the next six months. Just under half (48 percent) of resource partners have started to cut back on expenses as a result of potential tariff changes and 45 percent have not made reductions.

This report also features valuable insights from spa and resource partners about how they're responding to vendor price increases, implementing cost-saving measures and navigating operational shifts resulting from the tariff policies.

The April 2025 Snapshot Survey Collected 313 survey responses from ISPA spa and resource partner members from April 21, 2025 - April 28, 2025.

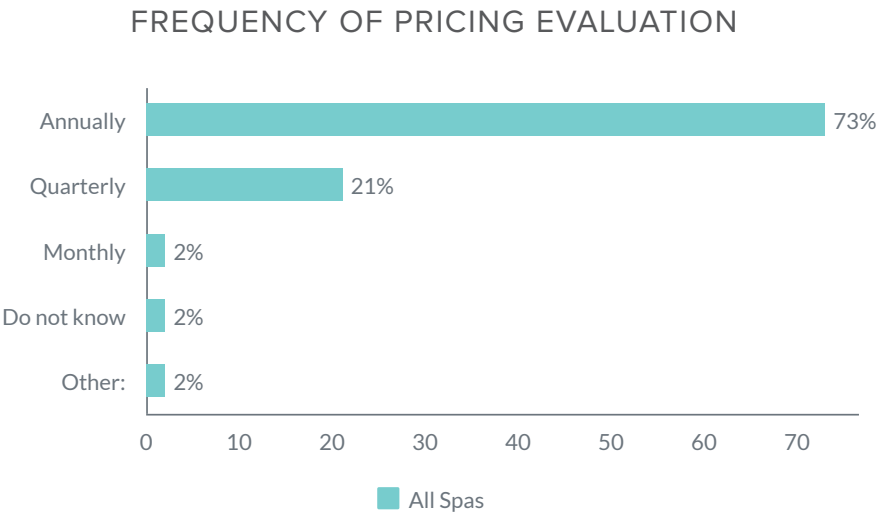
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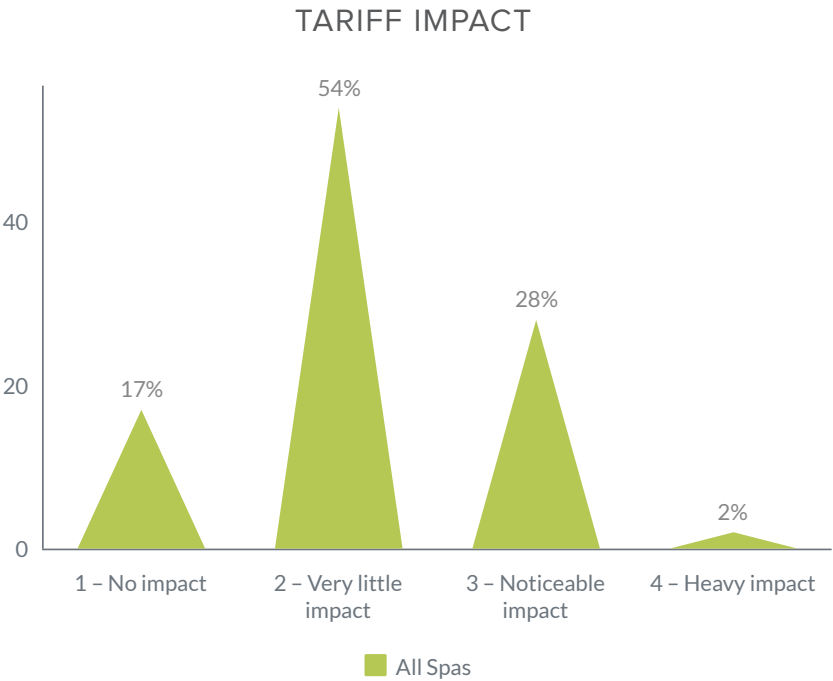


*Which of the following best describes on average how often your company evaluates the need for price changes?*



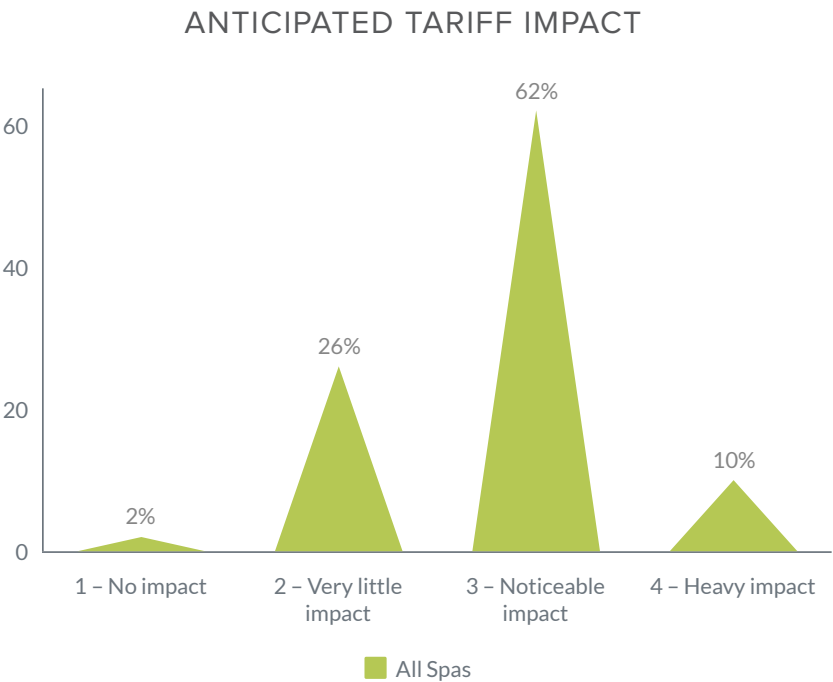
Q

Using the following scale please identify the level of impact tariff changes or potential changes have had on your business to date.



Q

Using the following scale please identify the level of impact you **ANTICIPATE** tariff changes or potential changes will make on your business within the next six months.



Q

*Please identify your spa's price changes, if any, for each of the following types of services from the six month period of October 1, 2024 - March 31, 2025*

## PRICE CHANGES OVER PREVIOUS SIX MONTHS

	MASSAGE SERVICES	FACIALS	BODY TREATMENTS	MEMBERSHIPS	SPA DAY PASSES
Increased >20%	<b>2%</b>	<b>2%</b>	<b>2%</b>	<b>2%</b>	<b>3%</b>
Increased 16 - 20%	<b>4%</b>	<b>4%</b>	<b>3%</b>	<b>2%</b>	<b>0%</b>
Increased 11 - 15%	<b>7%</b>	<b>5%</b>	<b>5%</b>	<b>2%</b>	<b>2%</b>
Increased 6 - 10 %	<b>17%</b>	<b>20%</b>	<b>16%</b>	<b>7%</b>	<b>5%</b>
Increased 1 - 5 %	<b>21%</b>	<b>17%</b>	<b>15%</b>	<b>8%</b>	<b>8%</b>
No Change	<b>46%</b>	<b>46%</b>	<b>49%</b>	<b>33%</b>	<b>37%</b>
Decreased 1 - 5 %	<b>1%</b>	<b>1%</b>	<b>2%</b>	<b>1%</b>	<b>1%</b>
Decreased 6 - 10%	<b>1%</b>	<b>1%</b>	<b>1%</b>	<b>0%</b>	<b>0%</b>
Decreased 11 - 15%	<b>0%</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>
Decreased >15 %	<b>0%</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>
Do not offer/Not applicable	<b>1%</b>	<b>2%</b>	<b>2%</b>	<b>22%</b>	<b>21%</b>

Q

*Please identify your spa's projected/anticipated price changes, if any, for each of the following types of services from the six month period of April 1, 2025 – September 30, 2025.*

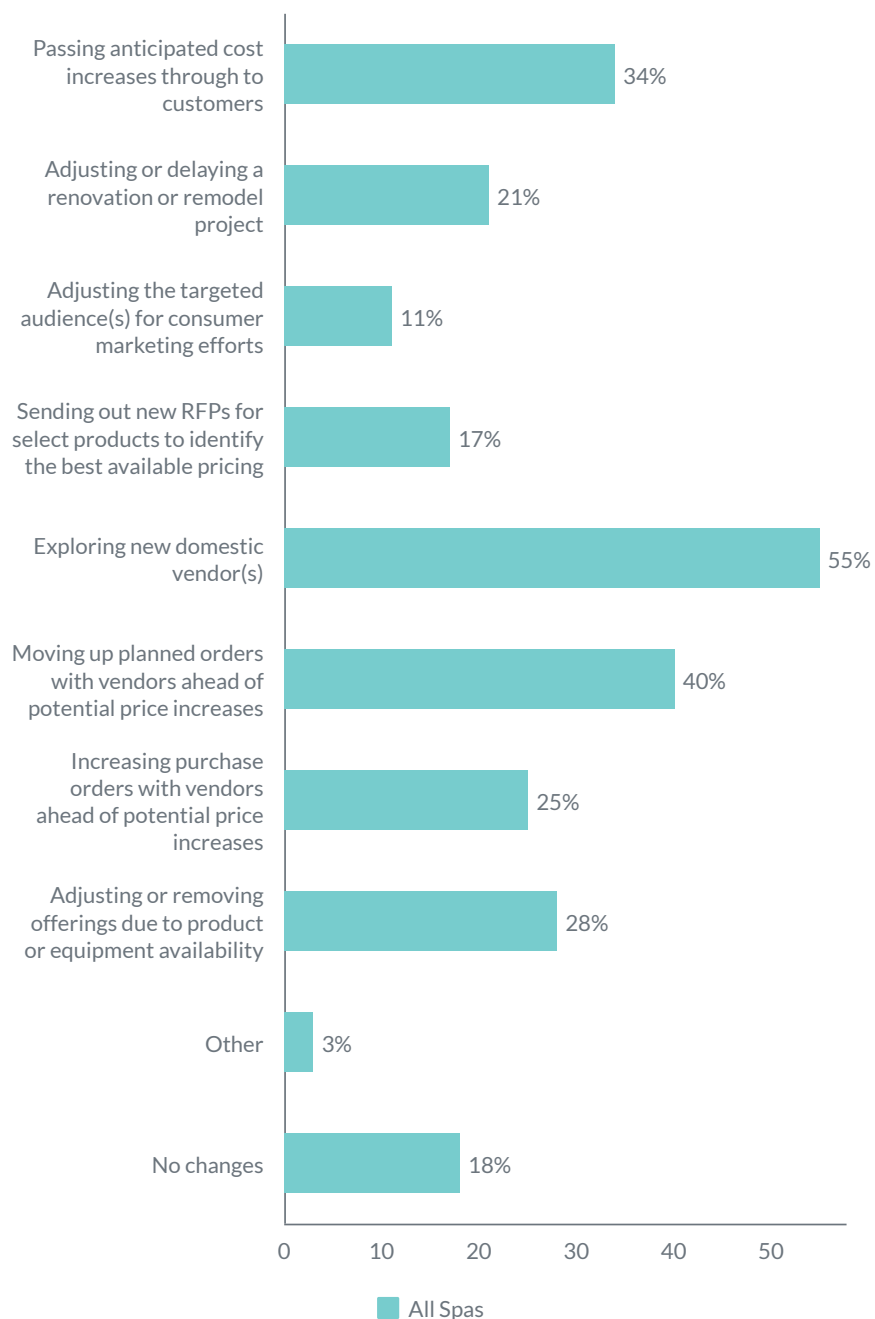
## ANTICIPATED PRICE CHANGES OVER NEXT SIX MONTHS

	MASSAGE SERVICES	FACIALS	BODY TREATMENTS	MEMBERSHIPS	SPA DAY PASSES
Increased >20%	<b>0%</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>
Increased 16 - 20%	<b>1%</b>	<b>1%</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>
Increased 11 - 15%	<b>4%</b>	<b>3%</b>	<b>4%</b>	<b>2%</b>	<b>2%</b>
Increased 6 - 10 %	<b>19%</b>	<b>16%</b>	<b>15%</b>	<b>7%</b>	<b>7%</b>
Increased 1 - 5 %	<b>23%</b>	<b>22%</b>	<b>19%</b>	<b>8%</b>	<b>9%</b>
No Change	<b>46%</b>	<b>47%</b>	<b>50%</b>	<b>43%</b>	<b>45%</b>
Decreased 1 - 5 %	<b>1%</b>	<b>1%</b>	<b>1%</b>	<b>0%</b>	<b>1%</b>
Decreased 6 - 10%	<b>2%</b>	<b>2%</b>	<b>2%</b>	<b>0%</b>	<b>1%</b>
Decreased 11 - 15%	<b>0%</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>
Decreased >15 %	<b>0%</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>
Do not offer/Not applicable	<b>1%</b>	<b>2%</b>	<b>2%</b>	<b>17%</b>	<b>17%</b>

Q

*Which of the following actions, if any, has your company taken or plans to take in anticipation of potentially higher tariffs this year?*

## ACTIONS IN ANTICIPATION OF POTENTIAL TARIFF CHANGES



Q

*Have you received a notification of tariff-related price increases from any of your vendor partners within the following categories?*

## NOTIFICATION OF TARIFF-RELATED PRICE INCREASES

	YES	NO	DO NOT KNOW
Equipment (fitness, massage tables, devices, etc.)	<b>30%</b>	<b>51%</b>	<b>20%</b>
Food/beverage	<b>15%</b>	<b>51%</b>	<b>35%</b>
Textiles (uniforms, linens, towels, robes, etc.)	<b>58%</b>	<b>31%</b>	<b>11%</b>
Skin care or beauty	<b>35%</b>	<b>54%</b>	<b>12%</b>
Software or technology	<b>7%</b>	<b>66%</b>	<b>27%</b>
Services (consulting, design, marketing, etc.)	<b>2%</b>	<b>67%</b>	<b>31%</b>



Q

*Which vendor partner categories are you seeing the greatest shift/change from as a result of tariff-related price increases?*

- All.
- Apparel.
- Apparel and accessories.
- As of now most vendors are saying they do not know but recommend we purchase what they have already in the states.
- Back bar and retail product lines.
- Clothing.
- Currently our linens/robes since we source from Canada.
- Distributors who source products.
- Equipment.
- FF&E and Linens.
- Fitness.
- Fitness equipment.
- Food and beverage and replacement parts.
- Gift & Retail items.
- Imported products for retail.
- Linens, Robes and technology like experience loungers.
- Merchandise clothing.
- Operating supplies and health and beauty products.
- Our hard goods such as branded bags and custom merch.
- Peloton bikes from China.
- Products, especially massage oils, chocolates, linens, and small-batch manufacturers. We also received a notice of price increase in POS software and credit card processing fees, which surprised us.
- Retail and skincare.
- Sheets and towels.
- Skin Care.
- Soft goods.
- Spa clothing.
- Supplies.
- Textiles.
- Uniforms and supplies.

Q

*Please describe any efforts your spa has in place to prepare for any existing or potential vendor partner price increases.*

- Alternate shipping routes are being [considered].
- As of right now we have not received noticed of a price increase from most of our vendors. Once we do we will plan accordingly.
- At the moment all spas will continue to move forward with excising plans, but all new vendor partners have been paused until we understand the true impact of our current economy.
- Change vendors or increase pricing.
- Contingency planning, sourcing new/domestic vendors.
- Cut costs where we can. Create new services with minimal labor involved and a bargain price for the consumer.
- Earlier investment to avoid tariffs.
- Early purchasing.
- Explore new product and vendor options.
- Exploring vendors in the US.
- I am a very seasonal operation and typically always do heavy orders in the winter and summer to get through spring and fall. These bulk orders help on shipping and expenses in the slower months. Linen increases will affect us when doing our annual order before the winter but gives time to shop around for other options. Retail increases will reflect in the MSRP.
- We're reorganizing space to create extra storage to order large quantities products prior to price hikes. We're storing large quantities of non-perishable nail supplies (i.e. Files, buffers, etc) We know which supply issues caused the most frustration in 2020 (for example, finding good quality nitrile gloves at a reasonable price) so we are looking at the most impactful items as the most important to stock up on.
- If necessary, we will communicate to guests about increased costs as it relates to possible price increases in products or services.
- Increasing and expediting orders.
- Increasing the price for the treatments.
- Large linen orders placed and received.
- Looking for local vendors.
- Looking to leverage a cost-conscious change in customer spending habits.
- Marketing and Promotions.
- Negotiate pricing due to volume.
- Price comparisons, corporate consolidation for greater buying power.
- Reevaluate the services and products.
- Smaller treatment increases.
- We are budgeting for these anticipated increases and are getting creative and different ways to try to build business to help offset those costs rather than increasing treatment prices.

- We are looking at local brands partners for our products we purchase regularly. Larger ticket items we will continue to price shop and ensure we purchase the item that is the best fit over the price as long as ROI is relevant.
- We are using yield management.
- We have added domestic lines, so we can rely on our US brands less and are prepared to order less if needed.



***Please share any recommendations you may have for your ISPA resource partner member peers relating to the communication and implementation of price increases that may be helpful to them as they navigate any necessary changes.***

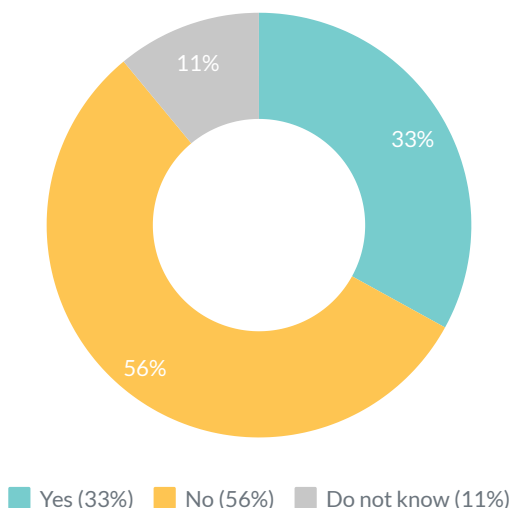
- Advance notice is always appreciated.
- Always gather data, and make a price analysis of your competitors.
- Always good to have your ducks in a row before triggering the price increase in your booking system. Your website & collateral should already be updated before implementing new pricing. If you have promotions running, you may have to figure out new pricing for these promotions and update how they are advertised. You just always want to be sure that no matter where your guests look, the pricing will be consistent before launching.
- American made products/vendors & price comparisons.
- Any price increase related to tariffs should be listed as a separate line item and not buried in other areas. If the tariffs are removed the increase should go away.
- As much transparent communication as possible. Ensure line items on invoicing for tariffs are specific to import costs — not total goods cost.
- Depending on how guests react to the economic shift we must adjust pricing as necessary and look at yielding pricing for slower months.
- Don't accept the price without negotiation.
- I think it is beneficial for US partners to offer a discount to allow Canadian or other international partners continue to work with their lines. We have to consider the exchange rate, plus taxes, duties and tariffs. If companies can help to offset some of those charges. The US company provides a discount, we are willing to pay a little more than usual, and we split these additional charges, in hopes of continuing to work with our US partners.
- I would suggest using dynamic pricing models, this prepares the guest to know that prices fluctuate like hotel or airlines.
- Look for innovative ways to manufacture products that are not made in countries with high US tariffs.
- Newsletter.
- Quick approval process as some vendors are only providing guaranteed pricing for 24 hours.

- Quick transparent communication so if a change is not needed, we do not need to spend the time researching a new partner.
- Since January, we've educated and prepared employees on what to expect, this is especially important for those who struggle with even small changes. I have always been transparent about product pricing and the total cost of doing services, and when we see a shocking price increase, I share that with providers so they know. I also get their ideas on other brands to explore or service protocol changes that might help ease costs, but also make their lives easier or services with extra steps flow better. If forced to find a silver lining at this stage, it is that we've had to get creative to keep prices down and that has helped us find a few areas we could be more efficient or products that cost less but actually perform better for us. Without the tariffs, we'd have continued with status quo.

Q

***Has your company cut back on expenses as a direct result of the potential impact of tariff changes?***

## EXPENSE CUTBACKS





*Please identify what changes have been made to reduce expenses.*

- Changing massage oil brands, in the process of changing point-of-sales and scheduling. software and credit card processing for significant savings to help offset other increases. We're also looking at unnecessary expenses.
- Closer monitoring of purchases.
- Conservatively ordering.
- Decreasing labor and tightening operational expenses.
- Expanded diversity in marketing efforts to drive business.
- Finding less expensive options.
- Fitness center equipment, towels and linens.
- Hiring freeze, opening new accounts.
- I'm not purchasing any new things right now.
- Implemented a 50% expense savings initiative. Asking everyone what is one thing they can do to impact reducing expenses.
- Labor costs, capital spending and bulk appeal purchases.
- Labor is the biggest expense, so cutting staff when possible and adding shifts to pick up if a room is available on the busiest days.
- Laundry cost.
- Limited overtime, staffing, reducing guest amenities.
- Local vendors.
- Lower budget on all expenses.
- Minimize back stock in retail to working numbers not excess.
- More control over PO's and approval processes.
- Pause on some orders and pause on employee appreciation week activities.
- Planned reduction in operating hours.
- Reduce the expenses and only ordering what we need and not overstocking merchandise.
- Reduced capital expenditure.
- Review of capex projects.
- Source for a different supplier.
- Undergoing a full SKU rationalization to help absorb increased costs on necessary items.
- Unfortunately, it's always payroll for the hourly employees that do not bring in revenue. We've cut back hours where and when we can.
- We are being smarter about the day-to-day orders.

Q

***What has been the most noticeable shift, if any, your spa has made as a direct result of tariffs? Details are greatly appreciated.***

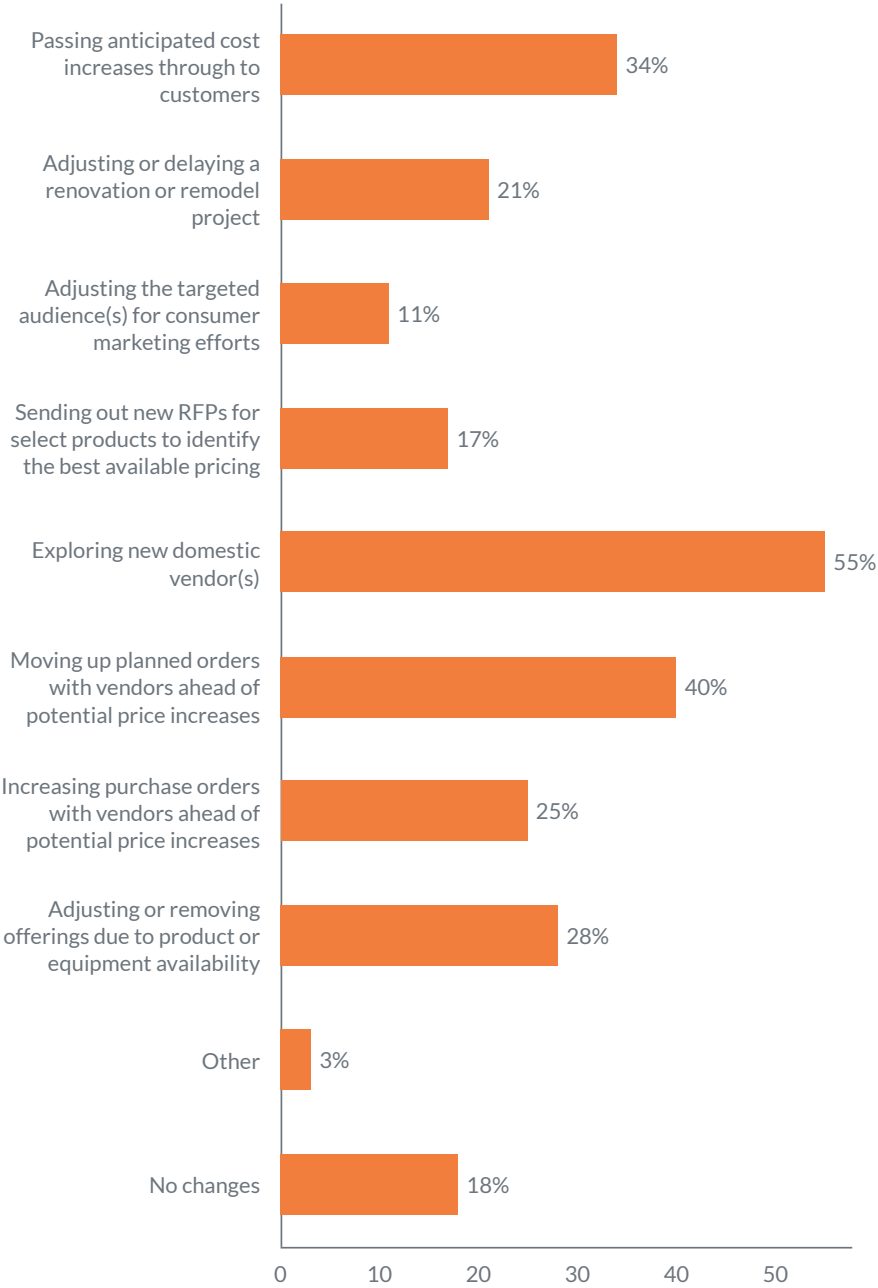
- Attempts made to identify alternative suppliers where providing the costs and time delays have affected the supply.
- Communication about ordering sooner.
- Currently just tracking and highlighting where the changes are that we can identify.
- Diving into opportunities for savings to offset predicted expenses so we can market that we are absorbing costs as long as possible in recognition that guests are also struggling with increased expenses in their lives. Some of these changes, like moving to a better software program have been long overdue, and asking customers to download a new app, change their links, the number they text, update forms etc... Feels overwhelming, this is the nudge we needed. Because we anticipate customers grumbling about the slight inconvenience, we are letting them know well in advance "In order to avoid passing our skyrocketing costs on to you, we've gotten creative in finding ways to absorb the costs and offer a better software interface for you. Please help us by (completing an updated form, downloading the new booking app, switching the number you text in your phone, tapping a card instead of using a card on file...) These small actions will have a big impact that will allow us to keep your prices the same as long as possible." I think that guests will struggle to argue with that.
- Having to identify which country all of our products come from and the corresponding tariff to make a good business decision. It is a lot of work and can change at any time.
- Higher pricing.
- Increased focus on domestic travel.
- Less facial bookings.
- Looking for local Toronto-made or Canada-made vendors.
- Lower business demand. Smaller average check.
- Operationally not too much at this time other than having purchased a lot of linen to keep lower costs. Planned development has had to adjust to speed of approvals with cost increases
- Payroll cuts in anticipation of higher vendor pricing. Our community has been hit with significant Federal layoffs and people showing concerns about a possible recession, most noticeable in a decline in new memberships and cancellations of existing. As we are rebuilding, we will start adjusting hours again.
- Price comparisons.
- Prioritizing the need of orders placed, from essential to non-essential.
- Promotions to get clients in who are afraid to spend money right now.
- Robe and linen price increase and supply chain challenges.
- Staffing.
- Tariffs change like the direction of the wind. We do not knee jerk respond to every change. We have policies and needs and we do what's best for our guests and team.
- Using dynamic prices.

- We are buying in bigger bulk to lock in current prices, so we are spending more each month right now, but should balance out by year end.
- We are experiencing less hotel bookings which translates into less foot traffic for the Spa. We are very focused on our daily pricing to ensure that we are sending out SMS communication to our guests of any specials for the day that we run to fill a category.
- We had to place one linen order ahead of the tariff increases. We have been notified by two companies that they will need to increase their pricing to offset the tariffs. These are not companies we use regularly so it will not impact us.
- We have paused some new vendor relations due to uncertainty of economic impact and continue to wait until we understand the full impact.
- We have sourced domestic lines and looking for Canadian distributions. We have spoken with our US partners, inquiring about discounts and finding a way to continue to work together. However, we have adjusted our menu and retail offering to include domestic brands. This is a direct result of the impending tariffs. We want to ensure we have domestic option should we find the cost of working with our US partners too high. It was important for us to have domestic luxury offerings in place quickly.
- We saw a step down in demand almost immediately in the first couple of days in April that has continued for the most part through the rest of the month.



*Which of the following actions, if any, has your company taken or plans to take in anticipation of potentially higher tariffs this year?*

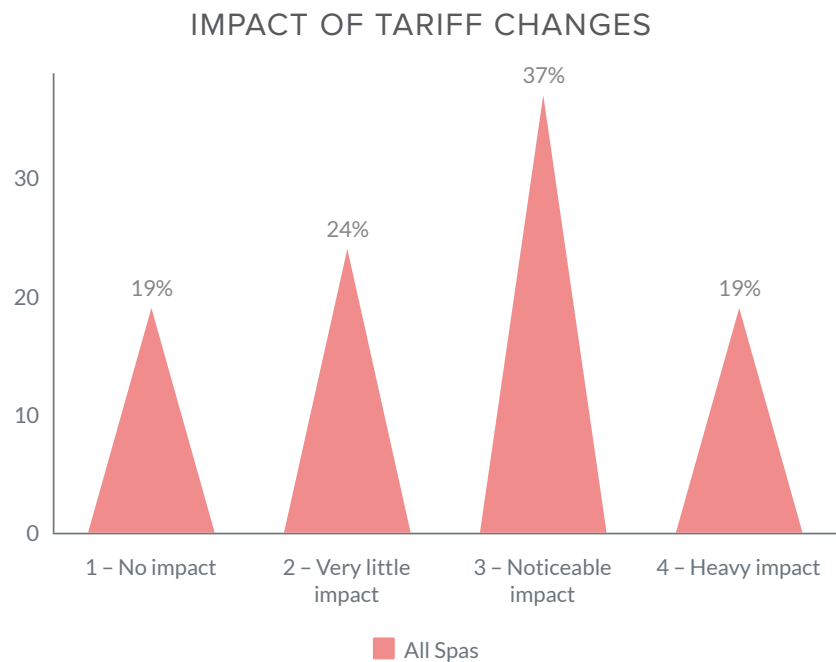
ACTIONS IN ANTICIPATION OF POTENTIAL TARIFF CHANGES





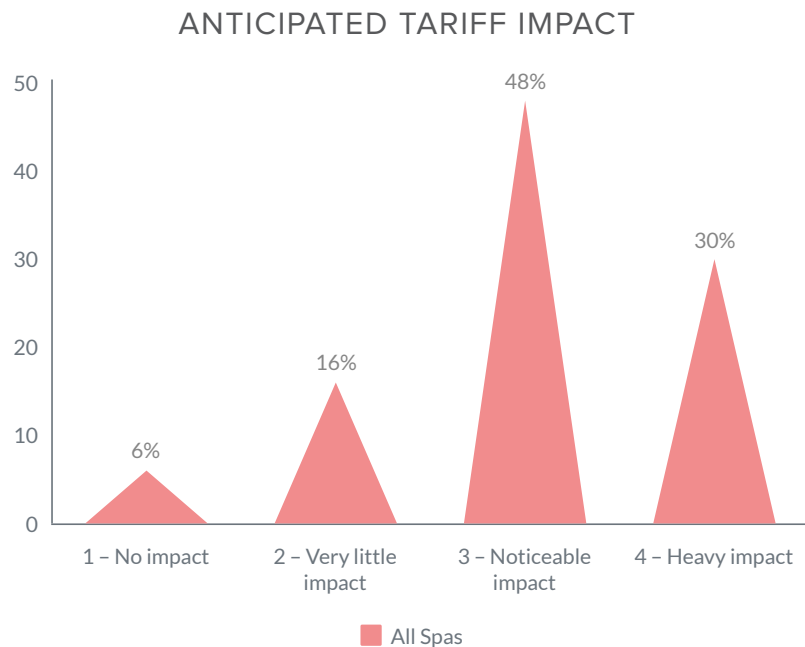
Q

Using the following scale please identify the level of impact tariff changes have had on your business to date.



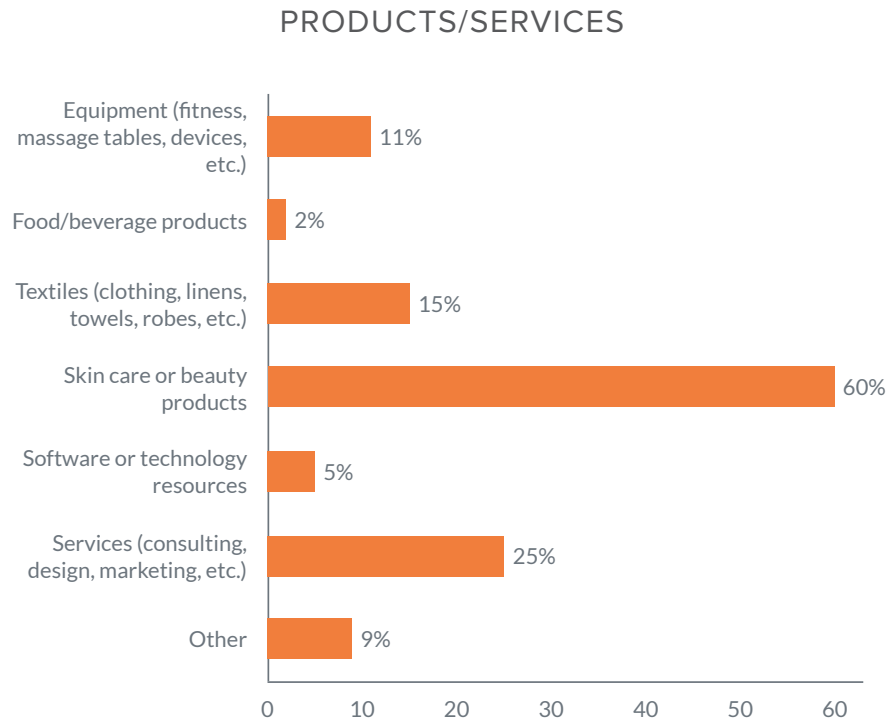
Q

Using the following scale please identify the level of impact you **ANTICIPATE** tariff changes or potential changes will make on your business within the next six months.





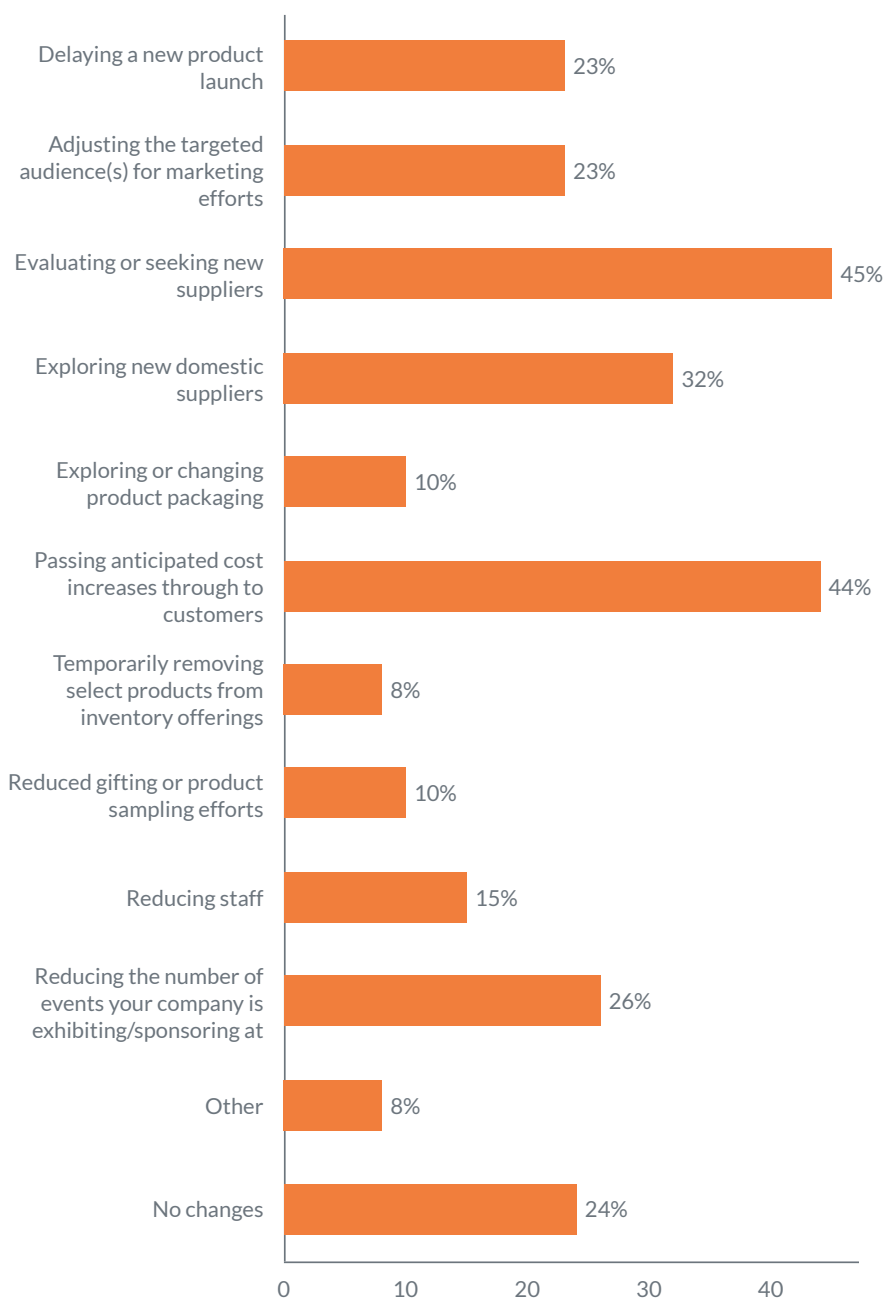
*Which of the following types of products/services does your company currently manufacture or sell?*



Q

*Which of the following actions, if any, has your company taken or plans to take in anticipation of potentially higher tariffs this year?*

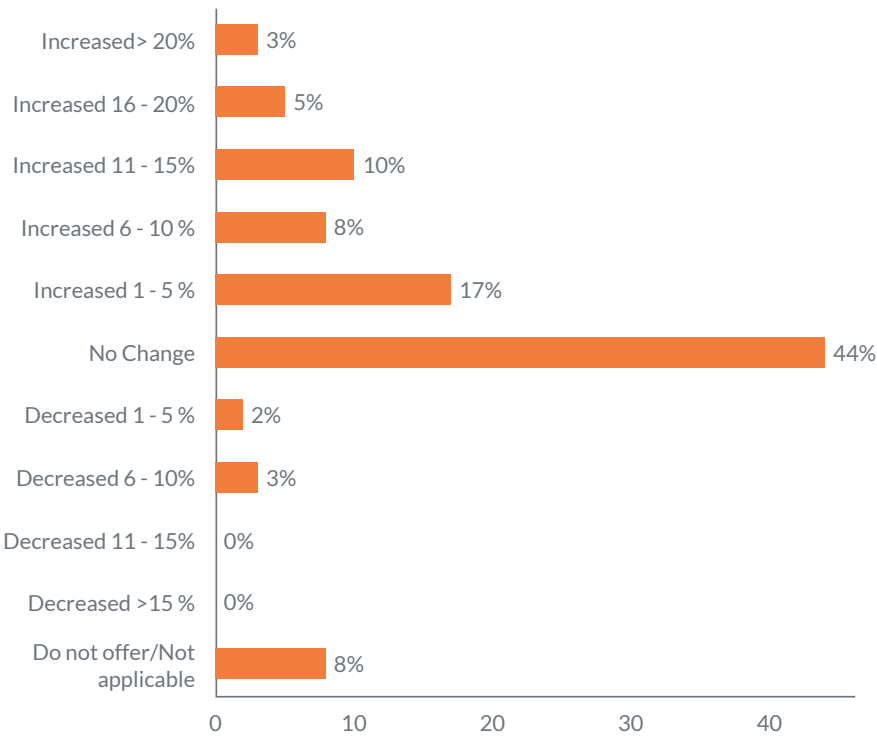
## ACTIONS IN ANTICIPATION OF POTENTIALLY HIGHER TARIFFS





*Please identify your company’s average price changes, if any, for products/services sold within the spa industry from the six month period of October 1, 2024 – March 31, 2025.*

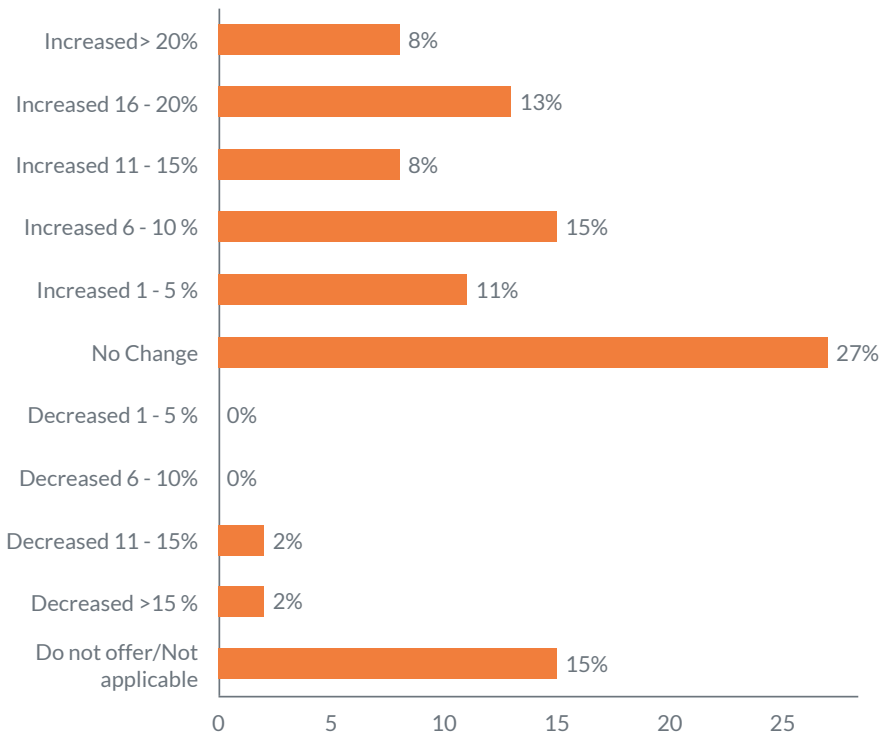
PRICE CHANGES OVER THE PAST SIX MONTHS





*Please identify your company’s ANTICIPATED price changes, if any, for products/ services sold within the spa industry from the six month period of April 1, 2025 – September 30, 2025*

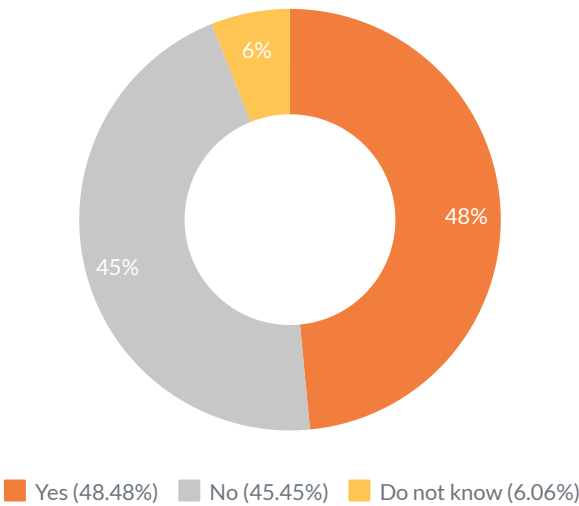
ANTICIPATED PRICE CHANGES OVER NEXT SIX MONTHS





*Has your company cut back on expenses as a direct result of tariff changes or potential changes?*

EXPENSE CUTBACKS





*Please describe what changes have been made to reduce expenses*

- Adjust packaging or product components.
- Canceled or did not renew memberships that do not fully align with company's business growth opportunities, eliminated all travel that is not required to close business or generate new business, migrated to operating platforms that accomplish more of what we need within a single platform and without the need for multiple other integrations, and have eliminated outsourcing work temporarily.
- Created special bundles kits that provide more value to the customer, helping justify shipping/duty fees.
- Cut back on travel.
- Cutting existing headcount, recognition, travel, education, tradeshow attendance, raises
- Eliminated about 25% of our tradeshow/events budget so far. Executing a more targeted approach/strategy for marketing, outreach and sales. And overall, everyone is tasked with reducing wherever we can- less travel, less 'bending' for clients to pay in installments or deferring payment, currently leadership is working on a new strategy for the year.
- Employee reduction.
- Explored bundling items in a way that lowers declared individual product values without violating regulations.
- Freezing hiring.
- Holding off on non essential expenses until we know the actual impact / final tariff
- Identifying non made-in-China items.
- Marketing and advertising.
- More virtual meetings.
- Reduce purchasing from China.
- Re-negotiate rates with UPS, DHL, fedex to potentially absorb duties in their pricing or provide duty prepayment options.
- Salary reductions- hours available for sales team — marketing team doing two jobs at once — immense emphasis on meeting goals with looming layoffs if not met.
- Use DDP (Delivered Duty Paid) services where possible to streamline customer experience and reduce delivery delays.
- We are decreasing the selection of medications/treatments available in our clinic, re-evaluating the price points of products offered.
- We are looking at our sales efforts outside of the US. May be some cutbacks there.
- We are not doing any more influencer PR boxes, our community gifting is lower, we aren't ordering any more silk, and we are reevaluating new product launches.
- We have put furlows on hours for employees back into place.
- We've explored if product classification codes (HS codes) can be optimized without misrepresentation.



***What has been the most noticeable shift, if any, your company has made as a direct result of tariffs? Details are of great value***

- 10% off your total order.
- A personal letter was sent to each customer to prepare them and inform them of a May 1st increase in pricing.
- As a result of feedback from current account partners (and new prospective accounts) in Canada that they will likely not be able to order from U.S., we are offering a price break and free shipping.
- We're helping our vendor clients stay centered on what matters most, offering flexible fees to help them keep moving forward, and providing support that adds real capacity, builds a strong foundation for growth, and keeps them prepared for the expansion that will come. Our goal is to help create meaningful progress and quick wins now, while setting them up for long-term success, even with all the uncertainty around shifting tariffs.
- Being vigilant on new project developments and assessing if they are being paused, canceled or moving forward as planned.
- Cash flow from parts orders arriving subject to anticipated tariffs.
- Creating a price increase that is fair and not passing all increases to our clients.
- Currently we can send orders up to \$800 without incurring tariffs, if this changes then we will include free stock to cover the tariffs.
- Cut back on T&E, cut back on events, shifts on NPI launches, new discovery of where product is being made and where supplies are being sourced, price increases, delay of production and shipment of products.
- Direction of marketing efforts and exploration for new partners.
- First, minimally raising pricing, secondly immediately sourcing some key products in the US.
- Free promotional items on orders over \$1,000 (valued at \$200+), which can be resold to further offset tariff costs.
- Free shipping (valued at 13–15% of your order).
- Hassle-free delivery – we handle duties, taxes, and tariffs upfront, simply adding these fees to your invoice, so you can avoid any surprises and minimize the customs clearance process
- In light of the recently implemented tariffs on U.S. imports, we're excited to share a special offer exclusively for our Canadian accounts. To help offset the additional tariff costs and ensure a hassle-free delivery of their order.
- Increase inventory now.
- Increased foreign orders as buyers anticipate price hikes.
- Ingredient manufacturers have now moved to dynamic pricing and prices are up, at the moment, about 15%. Today, we have to reach out for "pricing of the day" when submitting a PO as prices continue to escalate monthly. We have a shipment of packaging components which has just come off the production line in China and we are unable to ship it and are actively sourcing storage and warehousing options until the situation changes. The tariff cost on the order is no longer \$17,412 it is \$128,825.



- More emphasis on closing sales.
- Price increase and Customs requests.
- Properties have halted utilizing external recruitment services to manage in-house as well, they are not bringing in interim or task force to support their spa departments during transitions. Since coming out of Covid, these two services were in such high demand, we pivoted to include in our scope of services; so much so that we had to bring on additional support to fulfill the vast number of requests we had. Since the election, and even more so now, properties are doing without this support.
- Reduction in China production/purchasing.
- Seeking alternate sources, keeping track of tariff directions, however difficult that is!
- Seeking domestic vendors and seeking vendors in alternate countries.
- There has been a major delay in development of a new product that was being sourced through China. The uncertainty of the cost of the tariffs has brought the development of this item to a complete halt as we cannot get samples of pricing at this time. We also have experienced most of our Canadian Customers telling us that they will not buy anything from an American company.
- We anticipated tariffs and placed orders ahead, DDP so we avoided tariffs. We increased select prices and maintained core prices when we rebranded in February so we could launch at ISPA with set 2025 pricing.
- We are expanding into new geographic territories where the tariffs aren't going to affect our business. Diversification of markets is key right now.
- We are in the process of building a new facility and tariffs are expected to greatly affect the prices of materials and equipment in the facility. We are doing our best to lock down current pricing by making selections as early as possible. We are aware that some of these 'promised prices' may not come to fruition, so we may need to pivot as these changes occur.
- We are now getting notifications from DHL that imports will be delayed due to backlogs in the clearance process.
- We have held our pricing for the rest of this year but do anticipate raising prices on future products that ship in 2026. We may also need to cut back on some expenses in direct proportion to revenue shift. Researching new countries to produce in are being investigated now.
- We have shifted our demographics in terms of our buying audience.
- We haven't raised prices in 6 years and now we are. We are looking for other suppliers outside of US and are pulling back PR spending.
- We truly believe this isn't a time to pull back on momentum. It's a time to lean in, work together, and lift each other up. We're here for the long haul — committed to building real, lasting partnerships based on trust, teamwork, and shared success.

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