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state of the Naturals Market 2024

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PMPs Greenlight Natural Products

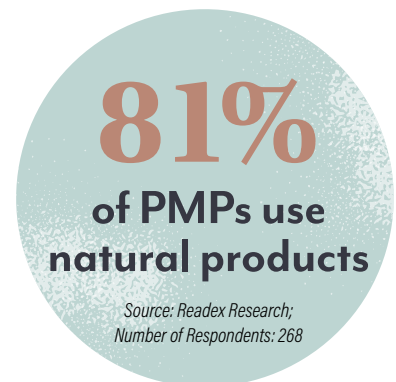
Chris Thornton believes in the power of natural pest management. His company, Earth Right Exterminating, manages pests for customers in Tennessee, Georgia and Alabama with great success using an organic-first approach. According to Thornton, 75 percent of the products he uses are organic, and they've helped his team achieve a 99 percent success rate.

"Organic pest management is nothing new; it's actually stuff Grandma knew back in the day," said Thornton. "She washed dishes in a dish pan and then poured the water around the house to get rid of the bugs. It worked because she was using soap made of lye, a natural insect repellent. So the organic trend started with 'grandmother science,' and then manufacturers serving the pest control industry got into the game."

As those manufacturers continue to evolve and improve organic pesticides, these products are gaining momentum with PMPs and customers alike. In 2023, PCT's State of the Naturals survey revealed that 75 percent of PMPs were using at least some natural products in their pest control services. That percentage grew to 81 percent in 2024, with respondents reporting that, on average, 16.4 percent of the products they use are green.

It's not just using the products but understanding how to use them that's helped them become more popular. For full effectiveness, they must be used as part of a comprehensive IPM program implemented by a knowledgeable technician.

"You have to bring science into it.



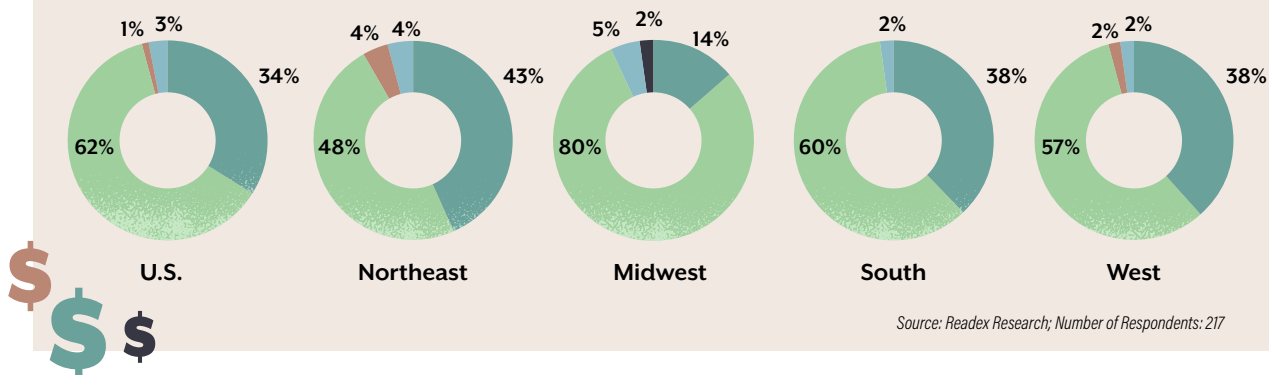
That's why all my technicians take entomology courses, so they can bring the science of nature into customers' living rooms," Thornton said.

Dalin Russell of Green Balance Pest Control in Richmond, Texas, explained, "Our first responsibility as pest man-

Price Points Vary Across U.S.

Does your location charge more, about the same or less for using green pest control products than traditional products?

More Same Less
Only Use Green No Answer



agement professionals is to educate the customer — after all, they are paying us for our expertise. This includes having an open discussion with them about what they’re seeing and suggesting realistic action thresholds for the pest(s) they’re dealing with. Then, we inspect, make recommendations for removing conducive conditions and, as the last step, discuss their product choices. Great IPM entails being open to the conscientious use of conventional pesticides as well as organic products that can be effective.”

THE PRICE IS RIGHT. One of the obstacles to using natural products has historically been their higher price. But PMPs are finding their price tags to be more comparable with those of their conventional pesticide counterparts, which means opting for an organic program doesn’t necessarily raise the price for the customer.

Across the country, only about a third (34 percent) of companies are charging more for a green service, according to the 2024 PCT study, with the Northeast and Midwest regions being outliers, at 43 percent and 14 percent, respectively. Sixty-two percent charge the same for green and conventional treatments. Very few charge less for green, which is understandable given the investment of time that goes into a service that’s focused on using minimal product to achieve maximum effectiveness.

Price usually isn’t the biggest factor for customers committed to a green lifestyle, said Russell. “Often, these customers are willing to pay more because they see more value in a natural solution.”

STOP & SMELL THE ROSEMARY OIL.

Remember when pest management companies hesitated to use natural products because so many of the botanical oils had a strong scent? Customers wouldn’t want those odors in their homes or businesses, PMPs reasoned, so they often opted to steer clear of them.

It’s a new day.

“Some of our older customers feel that, if it doesn’t smell, it’s not real pest control. With conventional pesticide applications, that smell told them it was working,” said Thornton. “When we spray an eco product in one of their homes, we try to spray a little around where they are so they can smell it. That gives them more confidence.”

In fact, Thornton added, a lot of Earth Right’s customers prefer the scent of green products. “It’s not an invasive smell, like the chemical, metallic smell of some conventional pesticides. Some people say it smells like a greenhouse or a fresh summer day.”

Toby Crowe of Compass Pest Management in Cornelia, Ga., agreed. “If a pesticide has no odor, our older customers

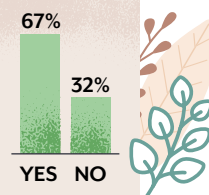
wonder if we’re just spraying water,” he said. “That odor lets them know they’re getting something for their money. Plus, some of the natural products — mint and eucalyptus, for example — really do smell good.”

Pest management professionals need to be respectful of customers’ sensitivities and be willing to engage in discussions

Dollars & Scents

Do most of the green products you use have an odor?

Source: Readex Research; Number of Respondents: 217



about products, said Russell. “In interior areas especially, the aroma of natural products is more prevalent. When we use those products, it requires some pre-explanation. For example, we may say, “There’s cedar oil in this product; if the smell bothers you, let me know, because we can pivot and look at other treatment options,”” he said.

But for those customers who are looking to add a little kick to their indoor fragrance profile, bring on the botanicals, Thornton said. “During the holidays, we use a lot of peppermint and spearmint for a fresh, Christmas-y feeling,” he shared. “Psychologically, it brings a little more joy to the customer, and we notice it also seems to make them a little more receptive to the treatment.” ●

Who Wants Green Services? Don't Count Anyone Out!

Twenty-somethings are definitely moving up in importance as PMPs consider the strongest markets for green services. The Gen Z market is virtually tied with the millennial market as being most responsive to green messaging in this year's PCT Naturals research, at 34 and 35 percent, respectively. Gen Z essentially closed a 12-point gap with the generation just ahead of them this year, reinforcing the notion that younger homeowners are driving demand for natural products and services.

"Younger generations do their research before they call a pest management company, so they are savvy customers who know what they want," said Toby

Crowe of Compass Pest Management. "You better believe they expect you to know what you're talking about, too!"

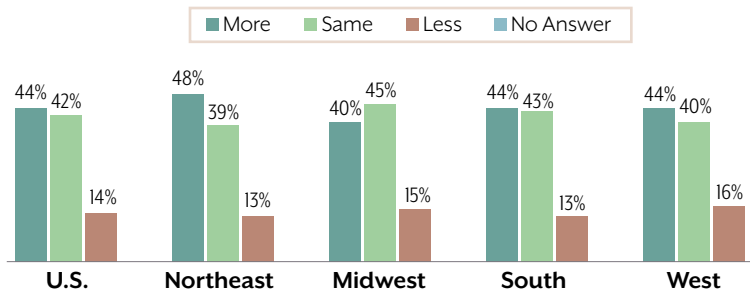
It's understandable that younger individuals and young parents would educate themselves on treatment options that limit their exposure to chemicals, but other generations and demographics are interested in natural treatments, too. PMPs have reported that seniors concerned with their health, as well as others with medical conditions, and people with pets tend to seek out green treatment options. Jake Wasson of STORYSOLD: Pest Control in Boring, Ore., caters to yet another demographic: vegans.

Wasson, who four years ago began

promoting his natural wildlife and pest management services on HomeAdvisor and Thumbtack, now relies solely on word-of-mouth and has all the business he can handle. "My customers fall into two categories: (1) vegans and others who are opposed to extermination and/or concerned with the environment, and (2) customers who have been displeased with the work of other pest management companies," he said. "I just visited an Airbnb yesterday, and the owner had a long list of companies that had come in and used conventional pesticides with unacceptable results. It didn't take me long to see that the first thing that should have been done was exclusion work, and no one had even proposed that to her." ●

Residential Green Awareness Remains Same

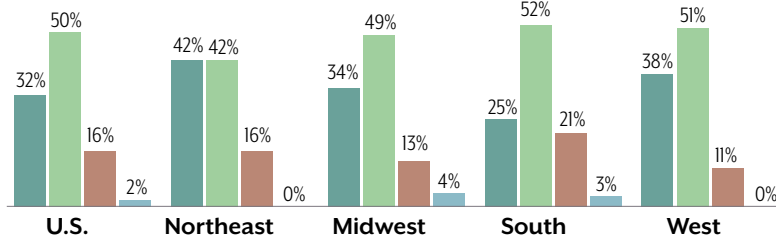
Do you think residential customers are more or less aware of green pest control products/services today than five years ago?



Source: Readex Research; Number of Respondents: 268

Commercial Green Awareness Lower

Do you think commercial customers are more or less aware of green pest control products/services today than five years ago?

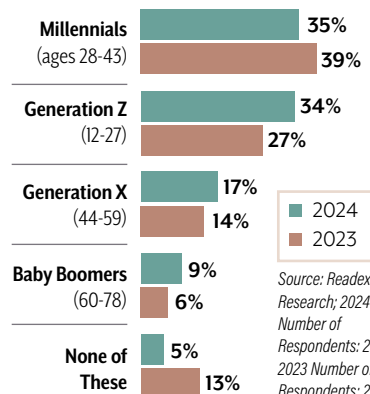


Source: Readex Research; Number of Respondents: 255



Millennials The Most Green

What customer demographic group is the most responsive to a green sales and marketing message?



Source: Readex Research; 2024 Number of Respondents: 217; 2023 Number of Respondents: 255



Getting Everyone on the Same Page

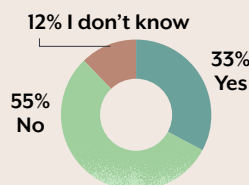
Education is critical to successful green services. First, company leaders need to stay current with natural products and IPM practices; then, they need to pass that knowledge along to technicians and customer service representatives; and finally, the technicians and CSRs need to share that information with customers.

“When we do the research into emerging products, we enable ourselves to offer our customers the best options,” said Dalin Russell of Green Balance Pest Control. “We need to stay up on the science, because it’s always changing and moving forward. The customers who invite us into their homes rely on us for the safety of their families and pets. They trust us to protect them, and the environment, from potentially harmful effects, so we need to really know what we’re doing, whether we’re applying a conventional or green product.”

Earth Right Exterminating’s Chris Thornton, who is an entomologist and served for several years as a state inspector, takes the education of his team seriously. “We require our technicians to complete six months of in-house training before they can even start any of their testing to get certified by the state. Our rigorous program includes two months of training with organic products, two months with conventional pesticides and two months focused on customer understanding. We’ve found this to be the best way to equip our team to make the best decisions about how to deliver the safest, most effective pest management services.”

Education is Key

Do residential customers understand what makes the pesticides you use green?



Source: Readex Research; Number of Respondents: 217

You Say Tomato, I Say Tomahito

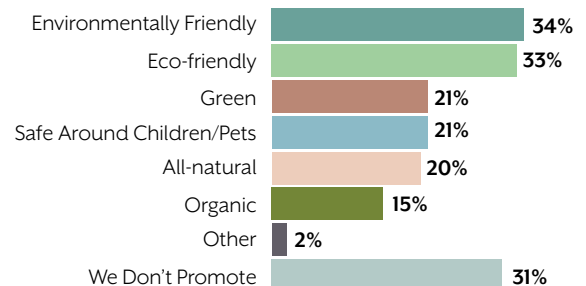
If you market green services to your customer and prospect base, it’s worth noting that some terms tend to resonate more strongly among audiences than others. “Environmentally friendly,” “eco-friendly” and “green” have been the terms most widely used by pest management companies since at least 2017, according to PCT research, so apparently they are delivering positive results. (This year, “green” shares the No. 3 spot with “safe around children and pets.”)

The 2024 survey uncovered a few regional differences, however — notably: Companies in the Northeast and Midwest are more likely to tout a “safe around children and pets” message than those in other regions, and they rarely market their products and services as “organic” or “green.”



Top Terms

What terminology does your location use in its marketing materials to promote green pest control products and services?



Source: Readex Research; Number of Respondents: 217
(Respondents could select multiple answers)

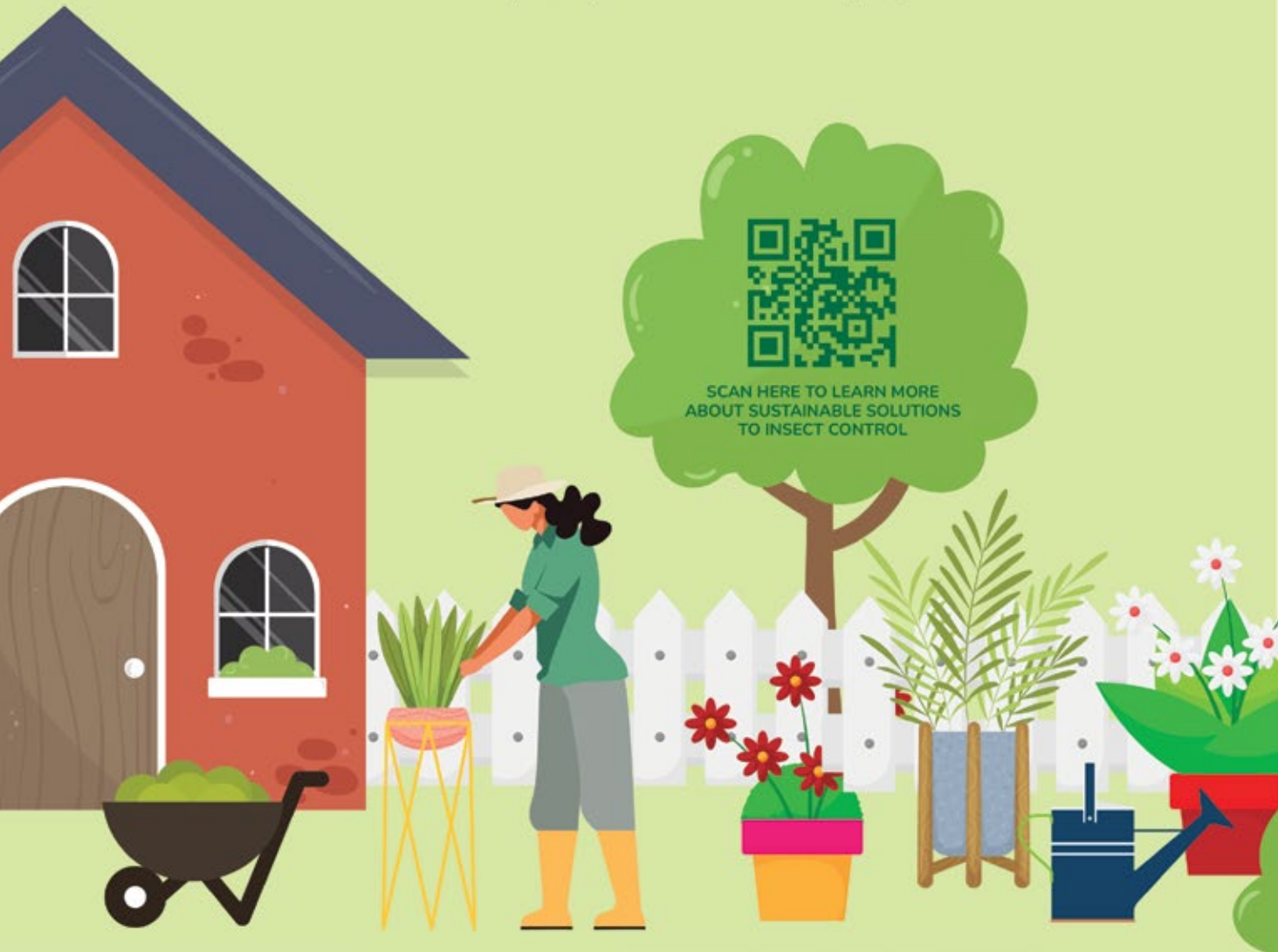


A Softer Approach to Backyard Mosquito & Tick Control

Customers are increasingly drawn to botanical products for backyard insect control, and it's not just a passing trend—it's a holistic shift towards a softer and more sustainable approach. Harnessing the power of botanicals helps balance a host of objectives, including the health of the environment, wildlife, and even the health of people.



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TO INSECT CONTROL



Backyard Health Threats

Two of the biggest health threats when it comes to backyard pests are mosquitoes and ticks. The danger lies not just in the immediate discomfort of bites but in the potential long-term consequences, as these tiny insects are armed with the ability to carry and transmit harmful pathogens.



Let's begin with **mosquitoes** – beyond the annoyance factor lies a more sinister threat. These seemingly innocuous bites can serve as gateways

for some of the world's most notorious illnesses—malaria, dengue, Zika, and West Nile virus. Effective mosquito control isn't just a defense against irritation; it's a frontline assault on the health threats mosquitoes carry that can directly impact your family. Did you know that mosquitoes can also transmit heartworm to dogs?



Ticks are also infamous pests of the great outdoors. Some ticks are so minuscule that they're difficult to spot with the naked eye. Larval ticks are also

potential carriers of diseases. The consequences of tick bites range from mild discomfort to severe and persistent health issues such as Lyme disease, anaplasmosis, ehrlichiosis, and more.

The Case for Using Botanicals

Controlling mosquitoes and ticks with time-tested botanical ingredients can contribute to a healthier environment and help deliver an effective means for control at the same time. Utilizing products with key FIFRA 25(b) exempt active ingredients like geraniol, cinnamon oil, and cornmint oil help promote a more environmentally conscious approach to pest control.

Effective Control of Mosquitoes and Ticks

In order to effectively control mosquitoes and ticks with a botanically-based, sustainable approach, a cutting-edge formulation is needed – a solution that not only provides residual control, but that has low impact and low phytotoxicity for the surrounding environment.

The ideal formulation for backyard insect control, Essentria® Mosquito & Tick Concentrate is an essential oil-based, FIFRA 25(b) insecticide designed for mosquito and tick control. It meets/exceeds guidelines established by APCCO, the official 25(b) work group founded by the EPA. Essentria® Mosquito & Tick Concentrate kills and repels mosquitoes for up to 14 days and is also effective against ticks. This versatile and water-based formula is suitable for use in automated spraying systems, fogging systems, and mist blowers.



A solution beyond mosquitoes and ticks...

When looking for a botanical product with a softer approach to control a broader spectrum of insects, check out Essentria® IC Pro insecticide, an essential oil-based insecticide with pleasant botanical fragrance and low phytotoxicity formula approved for sensitive indoor and outdoor applications. Essentria® IC Pro insecticide is a FIFRA 25(b) exempt solution formulated with the needs of homeowners, applicators, cannabis growers, and hemp growers in mind. This liquid insecticide provides long residual control for a wide variety of listed insects, including box elders, crickets, spiders, aphids, and more.

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Getting the Most from Green Products



Stephen Wheeler of PestPro in Cookeville, Tenn., loves the idea of natural pest management. “It would be so much better for everyone — especially the technicians who are exposed to so many products on a daily basis — if we all moved to green products and services,” he said. “Unfortunately, there are still some issues with longer-term efficacy. If I could get better residual effects at a comparable cost, I’d use green products exclusively.”

As it is, Wheeler’s go-to for interior services is a green aerosol. For exteriors and indoor spot treatments, his technicians use conventional pesticides. The mix provides good efficacy and staves off callbacks, he shared.

Other PMPs report similar hybrid solutions. “It’s not so much *which* products you use, but *how* you use them,” said Jake Wasson of STORY SOLD: Pest Control. His approach to pest management since establishing his own company in 2019 is far different from that of the companies he worked for previously.

“I focus on a thorough inspection — finding colonies while they’re out foraging and treating the trails with sugar and

granular baits. I explain to customers that there’s nothing more bio-friendly than a classic sugar-boric acid mix,” he said.

Chris Thornton of Earth Right Exterminating uses green products as much as possible. He explained that his team approaches infestations three ways: (1) using a HEPA vacuum to knock down the population and then applying an organic spray, (2) following up a conventional product application with an organic product to minimize customer exposure as well as pest resistance and (3) setting up a four-season approach that rotates organic and conventional products to get year-round control.

SPOTS FOR NATURAL PRODUCTS.

How PMPs use green products varies by the type of account and type of infestation they encounter. The 2024 PCT study revealed that PMPs across the country, with the exception of those in the South, are most likely to use green products outdoors, although indoor use and indoor/outdoor use can be common, too. Far and away the accounts most often treated with natural products are residences (71 percent), followed by schools and day care

centers (44 percent), health care facilities (31 percent), commercial office buildings (29 percent) and food handling facilities (28 percent).

WHICH PESTS RESPOND BEST?

Spiders pushed cockroaches out of the No. 2 ranking in the top three pests most commonly controlled by green products in a 2024 to 2023 comparison, and occasional invaders were named among the top three in every single region. Ants remained a favorite target in all but the Northeast, where mosquitoes took the No. 1 spot.

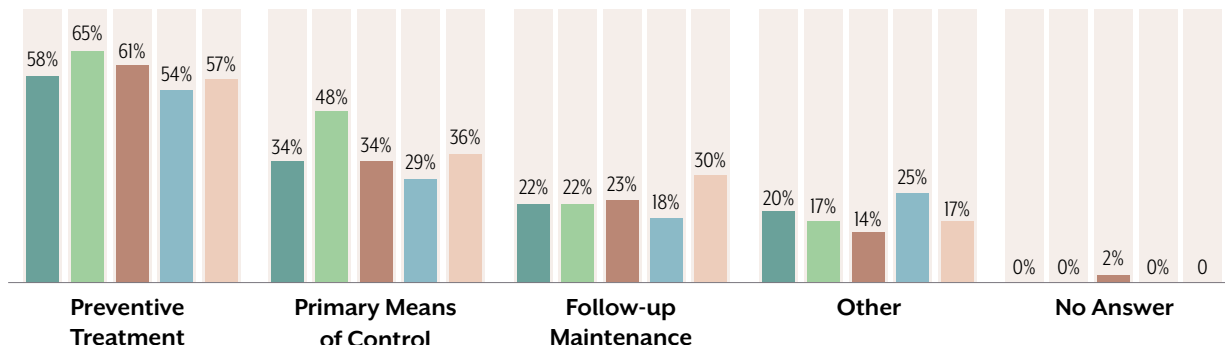
“We’ve found green products to be better at running insects off than killing them,” said Toby Crowe of Compass Pest Management. “For exterior treatments, they can be effective at keeping spiders, ants, ladybugs or stink bugs away, but it’s hard to lean toward green products for cockroaches that have infested a home.”

Thornton adds fleas to the list of indoor pests that may not respond well to natural products, but Wheeler says they are great for spiders inside windowsills. “The residual is much better there because the surface is protected from UV rays.” ■

Green Schemes

How does your location typically use green products in its pest control efforts?

■ U.S. ■ Northeast ■ Midwest ■ South ■ West



Source: Readex Research; Number of Respondents: 217 (Respondents could select multiple answers)

Green Schemes

What three pests does your location most commonly control with green products?

U.S.

- Ants 51%
- Spiders 36%
- Occasional Invaders 36%

NORTHEAST

- Mosquitoes 65%
- Ticks 57%
- Occasional Invaders 39%

MIDWEST

- Occasional Invaders 36%
- Ants 34%
- Mosquitoes 27%

SOUTH

- Ants 54%
- Cockroaches 49%
- Occasional Invaders 38%

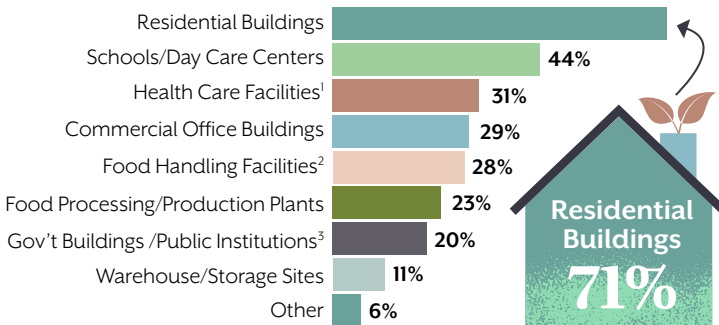
WEST

- Ants 70%
- Spiders 60%
- Occasional Invaders 30%

Source: Readex Research; Number of Respondents: 217

Residential Rules

At which types of accounts is your location most likely to use green pest control products?



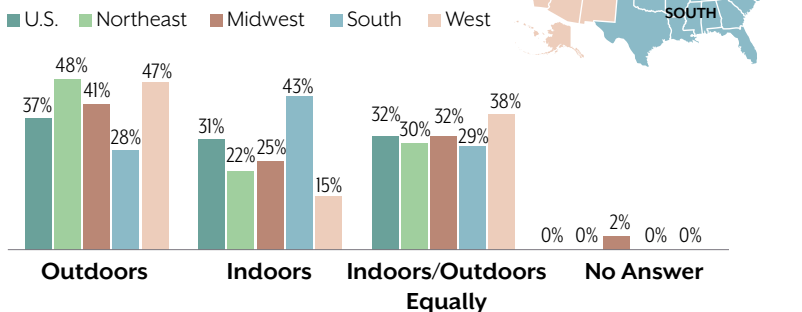
¹ Hospitals, nursing homes, senior living ² Restaurants, grocery stores, etc.

³ Offices, museums, archives

Source: Readex Research; Number of Respondents: 217 (Respondents could select multiple answers)

Treatment Location Varies

Where does your location apply green pest control products most often?



Source: Readex Research; Number of Respondents: 217

Commitment from Within: How Companies Are Investing in Green

As a whole, the pest management industry has embraced IPM practices and acknowledges that natural products have a place in IPM programs. Company leaders see the business potential and are investing time, effort and financial resources into making green options available to their customers. This is particularly true in the Midwest, where nearly half (45 percent) of respondents to the 2024 PCT State of the Naturals survey reported increasing green-related investments in at least one of the following: products, training, equipment, marketing and workforce.

Nationwide, 37 percent of PMPs have increased their green-related investments year-over-year, with some notable regional trends: In the Northeast, 35 percent of PMPs reported increasing their purchases of green products, and 22 percent reported increasing their purchases of equipment for applying green products.

40%
 of PMPs say their employees have expressed interest in using green products

Source: Readex Research; Number of Respondents: 217

Those percentages compare with 25 and 12 percent, respectively, nationwide. In terms of training, about one in five PMPs in the Northeast (22 percent), Midwest (20 percent) and West (19 percent) invested more, while in the South, 13 percent did.

In separate but related investments, three out of four PMPs (76 percent) reported taking actions over the past year to make their operations greener.

That's a notable increase over 2023, when 66 percent said they had engaged in such activities. Increases were noted in each of these categories: going paperless (39 percent), offering green products/solutions (38 percent), using routing software (37 percent), reducing energy consumption (18 percent), conserving water (18 percent), and buying or leasing more fuel-efficient vehicles (17 percent).

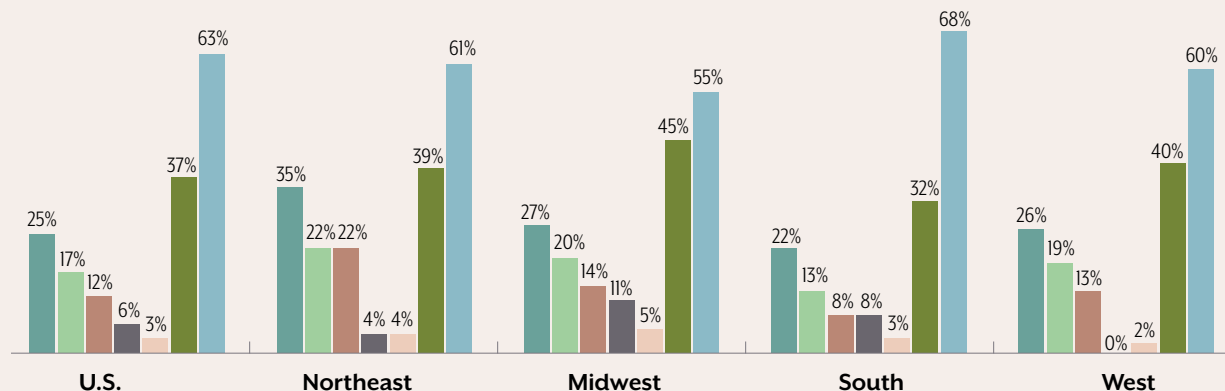
GETTING EMPLOYEES ON BOARD.

In companies that primarily use green products, employees are likely to understand and appreciate the reasons their company has made that choice. But service technicians who have been in pest management for many years and are now being asked to change how they do things to accommodate IPM practices and botanical product applications are sometimes less enthusiastic. Overall, just 40 percent of PMPs told PCT that

Slow & Steady Green Growth

Which of the following has your location increased in the past year?

- Purchases of green products
- Training for green solutions
- Purchases of equipment to apply green products
- Marketing green solutions
- Workforce to meet higher demand for green services
- Indicated at least one
- None of these



Source: Readex Research; Number of Respondents: 217 (Respondents could select multiple answers)

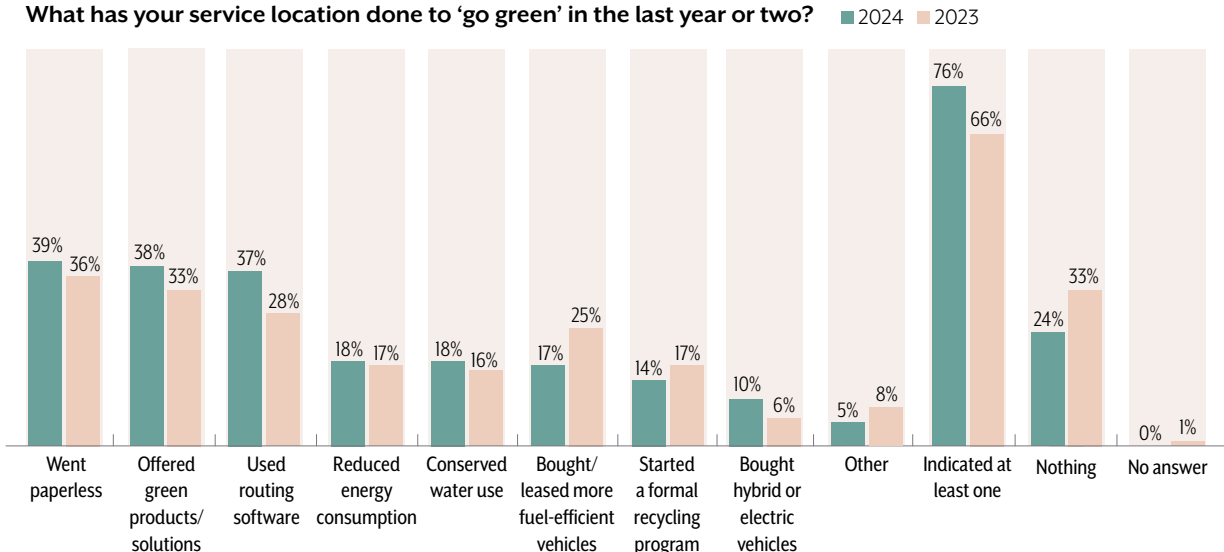
their employees have expressed interest in using green products. That number edged up from 37 percent in 2023, but there's still much room to grow.

What technicians need to understand, according to many pest management business leaders, is that green products aren't just better for customers and the environment, but also often for the people who apply them every day. "Technicians' exposure is much greater than that of a homeowner," said Stephen Wheeler of PestPro. "We may only spray a few ounces in a home, but multiply that by 10 applications a day, and you're looking at significant exposure."

Investments in training can go a long way in helping employees understand the health and environmental benefits of greener solutions. There seems to also be a natural mindset evolution happening as younger generations take a more active role in steering their companies into the future. "Our younger technicians are definitely on board with green products," said Toby Crowe of Compass Pest Management. "They have it figured out: We can get the control we want using products that are safe for customers, the environment and ourselves. What's not to like about that?"

Modest Moves

What has your service location done to 'go green' in the last year or two?

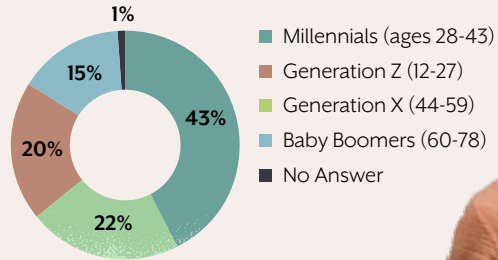


Source: Readex Research; Number of Respondents: 268 in 2024; 255 in 2023; (Respondents could select multiple answers)

Young Ones

Which group of employees do you think is most interested in adding green products to your toolbox?

Source: Readex Research; Number of Respondents: 87



Employees Understand Benefits

Which of these statements about your employees do you agree with?

My employees can communicate the difference between green and traditional pesticides	58%
My employees understand what makes the pesticides we apply green	52%
My employees feel green products are a positive development for the industry	36%
My employees believe green products are effective at controlling pests	22%
None of these	18%

Source: Readex Research; Number of Respondents: 217 (Respondents could select multiple answers)

ABOUT THE SURVEY The PCT 2024 State of the Naturals Market survey was sponsored by Zoëcon/Central Life Sciences and compiled by Readex Research, a privately held research firm in Stillwater, Minn. A sample of 4,381 pest control company owners, operators, executives and technical directors was systematically selected from the PCT database. Data was collected from 268 respondents — a 6 percent response rate — via online survey from Jan. 3-16, 2024. To best represent the audience of interest, the majority of results are based on the 217 respondents whose company location has used green pest control products for its services in the past year. The margin of error for percentages based on 217 responses is plus or minus 6.4 percentage points at the 95 percent confidence level. Charts may not add up to 100 percent due to rounding.



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<ul style="list-style-type: none">• Focused on mosquito and tick control	<ul style="list-style-type: none">• Broad spectrum control of crawling and flying insects
<ul style="list-style-type: none">• Kills and repels mosquitoes for up to 14 days and is also effective against ticks	<ul style="list-style-type: none">• Provides control for a wide variety of listed insects
<ul style="list-style-type: none">• Ideal for mosquito and tick control in outdoor spaces	<ul style="list-style-type: none">• Low fragrance, indoor and outdoor solution
<ul style="list-style-type: none">• Use in automated spraying systems, fogging systems, or mistblowers	<ul style="list-style-type: none">• Low phytotoxicity, approved for use on cuttings and hemp

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