

The background features a stylized illustration of various insects and foliage. In the top left, a green dragonfly is perched on a branch with red berries. In the top right, a green and white striped bee is flying near a cluster of orange spiral patterns. In the bottom left, a large green cockroach is shown. In the bottom right, a green ant is walking. A green spider is also visible on the right side. The background is composed of soft, wavy shapes in shades of green, yellow, and orange.

# 2025

# STATE OF THE NATURALS MARKET

## INSIDE

**PMPs are Gravitating Toward Green**

**Why and When PMPs Reach for Natural Products**

**PMPs Put Their Money Where Their Mouth Is**

**Customer Education Works!**

**PMP Attitudes and Perspectives Regarding Green**

**Exclusive Research**

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# GRAVITATING TOWARD GREEN



**W**hether inspired by customer demand, a sense of responsibility to the planet, or both, PMPs nationwide are incorporating natural products into their programs. Respondents to the 2025 PCT State of the Naturals Market survey said that about one in five (19.5%) of the products they use are green. In the Northeast, it's more like one in four products (25.4%).

Notable increases showed up in residential and commercial accounts this year. Specifically, where 71% of PMPs had reported using green products in residential buildings last year, 82% said they're using them in those accounts this year — an 11% increase. In commercial

office buildings, 29% were using green products in 2024 compared with 43% in 2025 — a 14% bump.

And while the majority of PMPs hold in common their support of using natural products, each company approaches its green program differently.

**FOLLOW YOUR HEART.** After 25 years of commercial banking, Mitch Love needed to get out and breathe the air. He had plenty of opportunity to do that from

his Cave Creek, Ariz., home, situated just north of Scottsdale and Phoenix in the Sonoran Desert, where sunrises astound, and wild animals abound. Respect for those animals pushed Love to establish Pure Desert Organic Pest Control in summer 2024.

"It's always been top of mind for me to treat my own property as environmentally responsibly as I could; I would never want to harm the wildlife — owls, hawks, coyotes, etc. — or the horses, dogs, goats and other pets that belong to so many of our neighbors here," he said.

Love said a negative experience with a pest control company that was irresponsibly using rodenticides led him to natural products. "I began treating my property myself through natural means, including using diatomaceous earth and essential oils — two natural options I had read about online — to control bugs and scorpions," he said.

He continued studying natural products and last year, by chance, met the owner of an organic pest management company. They discussed the science, available products and their mutual goal of elevating local pest control to be effective yet nontoxic for people, pets and other nontarget animals. Love walked away knowing what his next career simply had to be.

"I learned more, earned my license and opened Pure Desert Organic Pest Control," he shared. "We focus on IPM and use only 25(b) exempt pesticides.

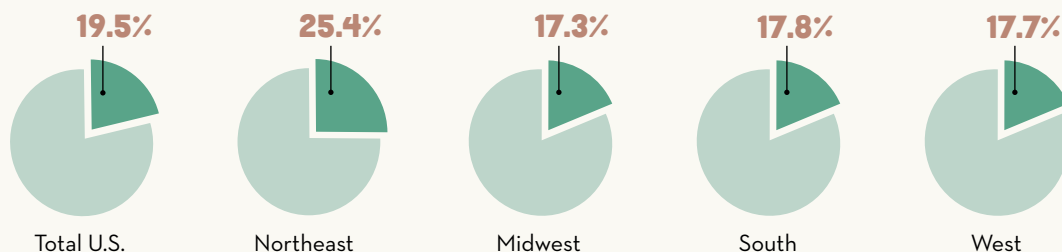
**“WE’RE USING GREEN OR GREEN-FRIENDLY REPELLENTS, TRAPPING AND MONITORING WHERE WE CAN, AND USING THERMAL CAMERAS TO DETECT STRUCTURAL GAPS, WASP NESTS AND OTHER ISSUES.”**

— LINDSAY BUJALSKI, PESTCO PROFESSIONAL SERVICES



## NATURAL PRODUCT USAGE

On average, what percentage of the products you use are green?



Source: Readex Research; Number of Respondents: 182

We've found them to be quite effective, and our customers appreciate our natural approach. We already have a loyal clientele, and we expect it to grow as people increasingly realize that the chemicals they come into contact with really do affect them."

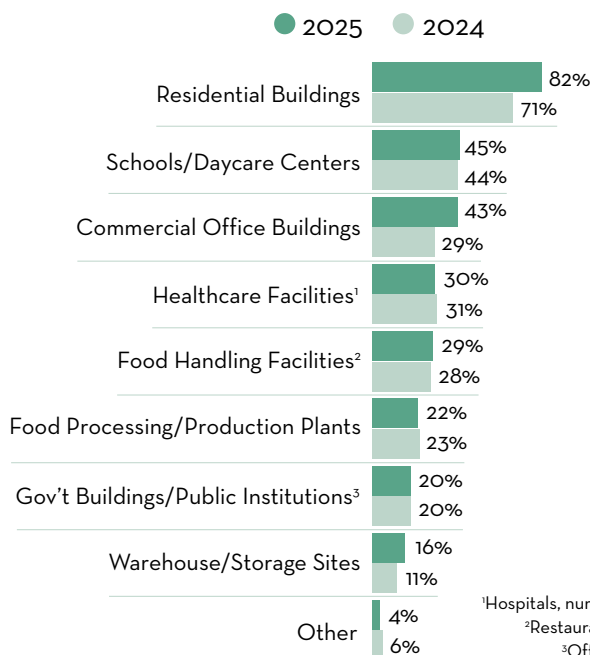
**KEEP CUSTOMER CARE IN MIND.** Even companies that offer a mix of options rather than a purely organic approach have stopped waiting for customers to request natural solutions — they lead with them instead. Lindsay Bujalski of Pestco Professional Services in Pittsburgh, Pa., explained how the company approaches their healthcare and residential accounts.

"We service every major hospital system in Western Pennsylvania, so we understand the importance of prioritizing patient care. If we're treating bed bugs, for example, we try to stick with steam so the hospital can reassign the room right away rather than dealing with the downtime that can be associated with pesticide use," she said. "Similarly, with residential customers, we encourage using 25(b) exempt repellents, such as pepper-mint-based repellents, on the exterior of their homes."

Gone are the days of overapplying conventional pesticides, Bujalski added, saying that through both product purchases and training, Pestco Professional Services is prioritizing prevention and leaning into green like never before. "We're using green or green-friendly repellents, trap-

## WHERE IT'S WORKING

In which type of accounts do you use green products?



Source: Readex Research; 2025 Number of Respondents: 182; 2024 Number of Respondents: 217 (Respondents could select multiple responses)

<sup>1</sup>Hospitals, nursing homes, senior living

<sup>2</sup>Restaurants, grocery stores, etc.

<sup>3</sup>Offices, museums, archives

ping and monitoring where we can, and using thermal cameras to detect structural gaps, wasp nests and other issues. The key is to accurately pinpoint where the pest problem is. We're never just going in and spraying pesticides everywhere."

**MEET MARKET DEMAND.** Jarvis Mimes' pest management company, The Pest Guy Pest Management in Memphis, Tenn., was built on providing flexible solutions. "I've been in the pest control

industry for over 30 years," he said. "Before information was readily available on the internet, people didn't have many questions for us. Now when we go into peoples' homes or businesses, they have a multitude of questions. When they ask about green products or express concerns — their grandmother lives there and has breathing issues, for example — we are prepared to respond with a natural treatment approach. You have to be ready to meet their expectations." 🌱



# WHY AND WHEN PMPs REACH FOR NATURAL PRODUCTS

**A**sked how they typically use green products, 2025 Naturals Market survey respondents were more likely to say as a preventive treatment and as a primary means of control than in 2024. This year, 64% are using naturals for prevention, compared with 58% last year. “Primary means of control” saw an even greater — 10% — increase, as 44% said they typically use green products for primary control.

These results point to PMPs’ commitment to reaching for natural products whenever an appropriate opportunity arises.

**SHOOTING FOR THE GREEN.** Greg Scott and his team at Guardian Pest Protection in Rockledge, Fla., approach pest management primarily with green products and practices. He said they are striving to go all the way green and are right now at about 90%.

“Botanicals can be effective in certain circumstances — managing wasps and other flying, stinging insects, for example, and flushing out German cockroaches — but their efficacy is not where it

needs to be yet for some of the primary uses,” Scott shared. “At Guardian, in particular, our approach is anchored to the concept of creating a barrier on the exterior of a home; we have as yet been unable to match the residual of conventional synthetic pesticides with botanicals.”

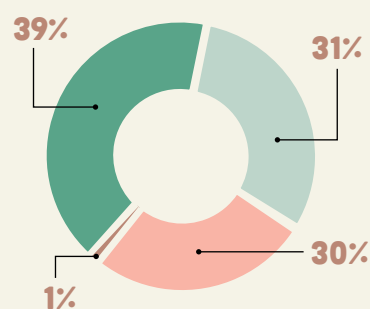
Scott is working toward overcoming this challenge by combining botanicals with borates in a three-tiered program that integrates the application of a botanical spray to a home’s perimeter with a heavy borate-based granular bait further out, supplemented by a sustainable dust. “We’re testing this with established customers who are enthusiastic about moving to a sustainable and eco-friendly service,” he said. “As environmental stewards, we are committed to protecting the planet, but we also need to make sure any service we provide works well, efficiently resolving customers’ pest issues.”

## INDOOR, OUTDOOR PREFERENCES.

Scott is among the 39% of respondents who told PCT they use green products primarily outdoors. Thirty-one percent

### IN, OUT AND ALL ABOUT

Where do you apply green products most often?

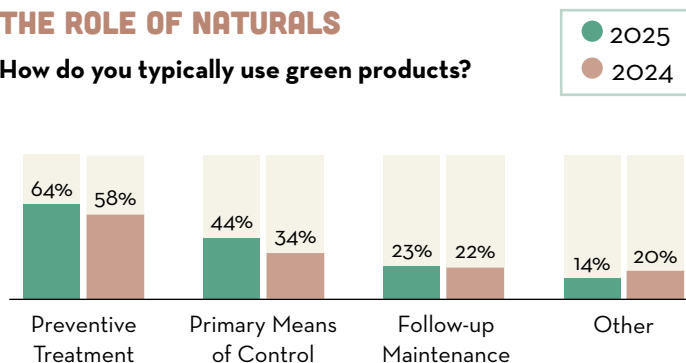


- Outdoors
- Indoors
- Indoors/Outdoors Equally
- No Answer

Source: Readex Research;  
Number of Respondents: 182

## THE ROLE OF NATURALS

How do you typically use green products?



Source: Readex Research; 2025 Number of Respondents: 182; 2024 Number of Respondents: 217 (Respondents could select multiple responses)

reported using them primarily indoors, and 30% said they use them just as often indoors as outdoors.

In Shingle Springs, Calif., John McIntyre said that Highlander Termite & Pest Control responds to more requests for outdoor than indoor treatments. And because the company's accounts are mostly multi-family residential buildings with challenging pest issues, he tends to rely more on conventional pesticides than green ones. "The only time we normally use green products is wintertime, because California rules and regulations restrict chemical applications if it's raining or too moist. Natural products aren't subject to those restrictions," he said.

McIntyre isn't opposed to using natural products; he said he has found one on the market that works very well in his program. He also, several years ago, formulated his own 25(b) exempt aerosol using essential oils, which he marketed until the COVID-19 pandemic compromised his supply chain. "We continue to use it a lot, usually when we're dealing with student housing, which requires an all-natural approach since students are always coming and going. The essential oil formulation kills and repels bed bugs, fleas and other insects."

**WHAT'S BUGGING YOU?** The type of pest you're managing often makes

a difference in whether you reach for a green or a synthetic product. PCT asked PMPs which pests they most commonly control with green products, and while the results vary from region to region, ants and occasional invaders were noted among the top five in every market. Cockroaches, spiders and mosquitoes were named in three of the four regions.

"If you use them according to the label, botanicals can work really well on mosquitoes," said Jarvis Mimes, The Pest Guy Pest Management. "For the most part, my mosquito properties aren't super large and don't have a lot of shrubbery or fountains to attract heavy mosquito infestations. They belong to customers who just enjoy spending time outdoors and want a preventive treatment. A botanical is an ideal solution for these accounts. I do have one or two accounts with more aggressive mosquito activity, and I've had to use other products to add a heavier residual."

Lindsay Bujalski, Pestco Professional Services, makes the case for green products in managing rodents as well. "Once we have rodents controlled inside using snap traps, monitoring and exclusion, we tend to have very good success with a green rodent repellent as opposed to strictly sticking with bait. The repellent is a nice way to add an extra layer of protection for the customer to help prevent rodents from coming back in."

## TOP 5 TARGETS BY REGION

Which pests do you most commonly control with green products?



### TOTAL U.S.

Ants.....	53%
Cockroaches.....	38%
Occasional Invaders.....	38%
Mosquitoes.....	37%
Spiders.....	31%



### NORTHEAST

Mosquitoes.....	50%
Ticks.....	38%
Occasional Invaders.....	38%
Ants.....	25%
Cockroaches.....	25%



### MIDWEST

Ants.....	43%
Occasional Invaders.....	36%
Mosquitoes.....	36%
Bed Bugs.....	32%
Spiders.....	32%



### SOUTH

Ants.....	60%
Cockroaches.....	51%
Mosquitoes.....	40%
Occasional Invaders.....	39%
Spiders.....	31%



### WEST

Ants.....	78%
Spiders.....	44%
Cockroaches.....	33%
Occasional Invaders.....	33%
Other.....	22%

Source: Readex Research; Number of Respondents: 182 (Respondents could select up to three responses)



A brass balance scale is the central visual element, resting on a bed of green moss. The background is a soft-focus green, suggesting a natural, outdoor environment. The scale's pans are empty, symbolizing balance.

# A Balanced Approach to Botanical Insect Control

Outdoor ecosystems maintain a delicate balance supporting beneficial and nuisance insects. It's essential for pest control operators to respect that balance and remain mindful of industry trends impacting it. Five years after the first COVID lockdowns, the conversation around green pest control continues to evolve. As back-to-office or hybrid work becomes mainstream and children returned to in-person lessons, heightened attention on products used in and around homes may have changed. However, increasing environmental awareness and weather-related disasters are heightening conversations about the long-term impact of our choices.

***Botanical solutions offer sustainable, adaptable insect control—delivering critical protection from insects with a softer environmental impact.***

## Understanding Insect Pressures

The demand for effective pest control remains strong as insect populations continue to adapt and thrive in changing environments, with some posing direct risks to human health, property, and quality of life. Pest control operators must stay ahead of these pressures with solutions that balance effectiveness with environmental responsibility.



**Mosquitoes:** Warmer temperatures and increased rainfall in many regions have led to longer mosquito seasons and heightened disease transmission risks.



**Ticks:** Populations are surging across the U.S., bringing an increased risk of Lyme disease, Rocky Mountain spotted fever, and other tick-borne illnesses.



**Ants:** Infestations remain a top concern for homeowners and businesses alike. Carpenter ants threaten structural integrity, while species like odorous house ants and Argentine ants create persistent indoor nuisances.



**Cockroaches:** Cockroaches are more than just a sanitation concern—they are known carriers of bacteria and allergen producers, posing risks to both residential and commercial spaces.



# Striking the Right Balance with Botanical Solutions

As environmental awareness grows, so does the demand for solutions that control nuisance insects while keeping local ecosystems top of mind. By incorporating botanical solutions into Integrated Pest Management (IPM) strategies, PMPs can help protect against rising insect threats while remaining environmentally conscious.

## Why FIFRA 25(b) Exempt Solutions Are Critical

Under the FIFRA 25(b) exemption, certain pest control products are designated minimum-risk pesticides by the EPA. While FIFRA generally requires extensive EPA registration and testing for most pesticides, 25(b) exempt products must meet stricter criteria to ensure minimal risk to people, pets, and the environment. However, not every botanical insect control product meets these standards. To qualify for 25(b) exemption, a product's ingredients and formulations must adhere to specific guidelines. Pest management professionals should carefully research products, ensuring they align with regulatory standards and customer expectations.

### Essentria® Solutions from Zoëcon Professional Products

Essentria® offers a powerful, FIFRA 25(b) exempt line of botanical insecticides designed for professionals. These products provide long-lasting and effective control of numerous insect species using botanically derived active ingredients.

#### Essentria® IC Pro

Essentria® IC Pro is formulated for a broad range of applications, including residential, commercial, cannabis and agricultural operations. Designed as an ideal family friendly pest control solution, this concentrate features a low-odor, low-phytotoxicity formula that provides long residual control of mosquitoes, spiders, aphids, and other listed pests.

#### Essentria® G Granular Insecticide

For outdoor spaces requiring a powerful yet environmentally friendly insect control solution, Essentria® G Granular Insecticide delivers immediate knockdown with easy-to-apply granules. Featuring Octopamine blocker technology, this product disrupts insect nervous systems with no bee restrictions.

#### Essentria® Mosquito & Tick Concentrate

Formulated for mosquito and tick control, this botanically derived formula delivers hard-hitting efficacy. Essentria® Mosquito & Tick Concentrate kills ticks and is approved for applications to a wide range of sites including shrubbery and vegetation. The concentrate kills and repels mosquitoes for up to 14 days, making it ideal for fogging systems, mist blowers, and automated spraying applications.

#### Essentria® Wasp & Hornet Spray

Get knockdown of stinging insects and their nests with this essential oil formulation. The botanic aerosol sprays up to 20 feet with foaming action that can reach hard-to-treat areas indoors and out. Essentria® Wasp & Hornet Spray is a non-staining solution, and it can be used directly on nests.

Learn about more about the application sites, active ingredients, and pests controlled by Essentria® products by visiting [Zoecon.com](http://Zoecon.com).



# PMPs PUT THEIR MONEY WHERE THEIR MOUTH IS

**T**he pest management business leaders who offer green services are standing behind that decision with investments into product purchases, training, equipment, marketing and staffing. Nearly half (46%) of PMPs said they have increased investments into one or more of these areas in the past year. That's a 9% bump over 2024, when 37% said the same.

Except for the West, PMPs across every region of the U.S. reported increases in green-related investments in 2025. The Northeast saw the largest year-over-year

increase: 14% (53% in 2025, compared with 39% in 2024). The increase in the South is notable as well: 44% in 2025, compared with 32% in 2024. Narrowing down to PMPs who increased their green product purchases, increases occurred in every region.

Internal investments reflect a focus on environmental stewardship as well, particularly related to fleets and travel practices. Each year, more companies are using routing software — 28% used routing software in 2023, compared with 46% in 2025 — and the number buying

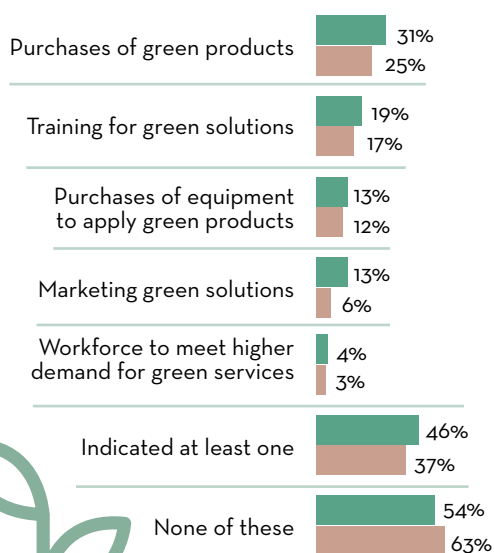
or leasing more fuel-efficient vehicles rose 11% year-over-year, from 17% in 2024 to 28% in 2025.

“We are always looking to see where we can cut waste and operate more efficiently,” said Lindsay Bujalski, Pestco Professional Services, Pittsburgh, Pa. “In the office, we’re constantly turning off lights, we’re paperless and we watch the waste we’re making. In the field, we have GPS trackers in all our vehicles that enable us to monitor driving habits and idling times so we can cut down on fuel consumption.” 🌱

## INVESTMENTS CONTINUE TO GROW

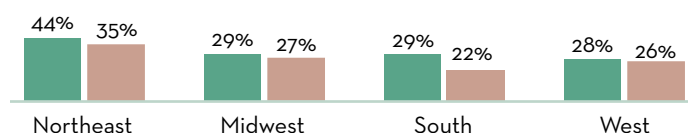
● 2025 ● 2024

### Which of these have you increased in the past year?



### Purchases of Green Products by Region

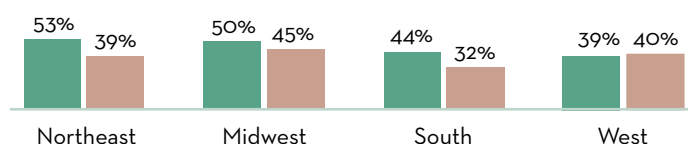
PMPs who have increased green product purchases in the past year:



### Indicated an Increase in at Least One Area

PMPs who have purchased at least one product, done green marketing, etc., in the past year:

**46% 37%**  
TOTAL U.S.



[For all 3 above] Source: Readex Research; 2025 Number of Respondents: 182; 2024 Number of Respondents: 217 (Respondents could select multiple responses)



## GREEN ENERGY

What has your company done to go green in the past year or two?

	2025	2024	2023
Used routing software	46%	37%	28%
Offered green products/solutions	44%	38%	33%
Went paperless	41%	39%	36%
Bought/Leased more fuel-efficient vehicles	28%	17%	25%
Bought hybrid or electric vehicles	16%	10%	6%
Reduced energy consumption	15%	18%	17%
Conserved water use	15%	18%	16%
Started a formal recycling program	10%	14%	17%
Other	3%	5%	8%
Indicated at least one	80%	76%	66%
Nothing	20%	24%	33%



Source: Readex Research; 2025 Number of Respondents: 261; 2024 Number of Respondents: 268; 2023 Number of Respondents: 255 (Respondents could select multiple responses)

## CUSTOMER EDUCATION WORKS!

While some customers become savvier about pest control options thanks to the internet, there's always the danger that the information they're getting there isn't entirely accurate. It's up to PMPs then to communicate accurate, reliable information that helps customers not only make the best choice for themselves, but also understand that they are a partner in the success of their own pest management program.

"I tell people often that knowledge is power: The more you know, the better you can help yourself," said Jarvis Mimes, The Pest Guy Pest Management. "The customer might see me every three months or so, but their consistent actions in between those calls can prevent a lot of pest activity. In addition to doing the things I do as a pest control operator to keep a home pest-free, I also need to educate the homeowner about taking out the garbage, keeping the garbage cans shut — all the things they can do to make their

homes less attractive to pests. As long as they have the proper information and knowledge, they can make a big, positive difference on their pest situation."

Mitch Love, Pure Desert Organic Pest Control, emphasized the importance of educating customers and potential customers about natural pesticide options. "In addition to understanding what conditions create an environment that's hospitable to pests and how changing those conditions can discourage home invasions, people need to know that pesticides don't have to be toxic to be effective. I teach them how these products work and help them see how they can protect their homes and properties without harming non-target animals or compromising the environment."

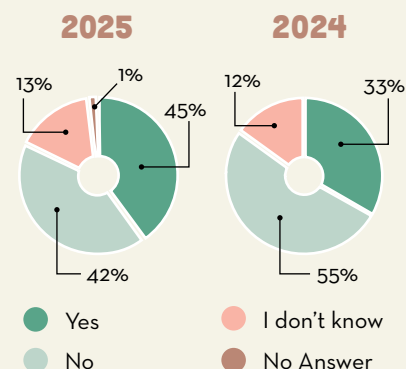
Based on results from the 2024 and 2025 PCT State of the Naturals Market reports, PMP efforts are paying off.

The number of survey respondents who said residential customers understand what makes a pesticide green was

up 12% year-over-year to 45%. The more customers understand, the more they support the pest management industry's efforts in delivering effective natural programs. 🌱

### CUSTOMERS CATCH ON

Do residential customers understand what makes a pesticide green?



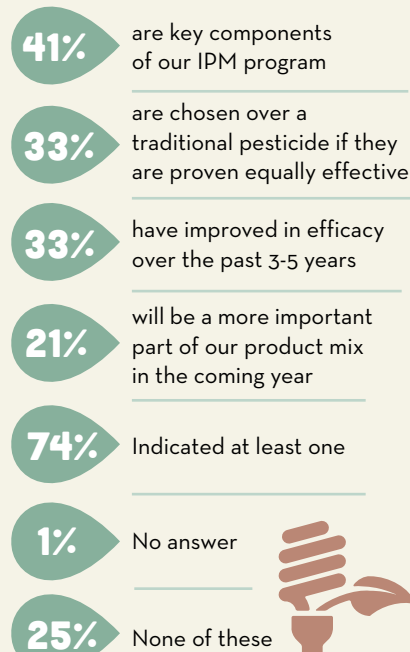
Source: Readex Research; 2025 Number of Respondents: 182; 2024 Number of Respondents: 217

# PMP ATTITUDES AND PERSPECTIVES

As the role of natural products in the pest management industry continues to evolve, PMP attitudes and support will be key. PCT asked them to share insights in a variety of areas.

## IMPORTANCE OF GREEN PRODUCTS

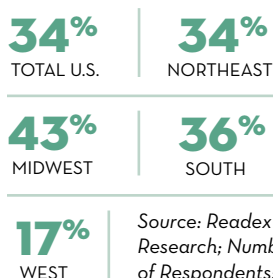
At my service location, green products...



Source: Readex Research; Number of Respondents: 182 (Respondents could select multiple responses)

## PRICING PHILOSOPHY

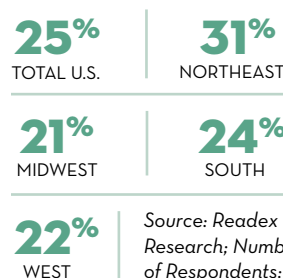
Percentage who charge more for green products:



Source: Readex Research; Number of Respondents: 182

## BRANDING OUTLOOK

Percentage who have created a separate, distinctive brand for their green services:



Source: Readex Research; Number of Respondents: 182

## EVOLVING VERNACULAR

What terminology do you use to promote your green pest control products and services?

	2025	2024
ECO-FRIENDLY	43%	33%
ENVIRONMENTALLY FRIENDLY	41%	34%
GREEN	34%	21%
ALL-NATURAL	29%	20%
SAFE AROUND CHILDREN/PETS	27%	21%
ORGANIC	22%	15%
OTHER	6%	2%
DON'T PROMOTE	17%	31%



Source: Readex Research; 2025 Number of Respondents: 182; 2024 Number of Respondents: 217 (Respondents could select multiple responses)

## ABOUT THE SURVEY

The PCT 2025 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 9,697 pest control company owners, partners, executives, presidents, technical directors, general managers and branch managers was systematically selected from the PCT database. Data was collected from 260 respondents

— a 3% response rate — via online survey from Jan. 6 to Jan. 27, 2025. To best represent the audience of interest, the majority of results are based on the 182 respondents whose company location uses green pest control products. The margin of error for percentages based on these 182 usable responses is plus or minus 7.2 percentage points at the 95% confidence level. Charts may not add up to 100 percent due to rounding.



# GENERATION YES

Is green pest control a young person's game?

You might think so, based on the results of the State of the Naturals Market studies. Since last year, interest seems to have waned a bit in individuals 45 and older, whether you're looking at the customers who respond to green messaging or the pest management employees who take an interest in green products.

As these Xers and boomers fall back a bit, millennials (ages 29 to 44) continue to stand strong, with awareness and interest rising among both customers and employees. Gen Z employees (28 and younger) are becoming more engaged

as well, which is great news for PMPs looking to grow their green business into the future.

In fact, employees are becoming more engaged overall, according to PMPs surveyed.

Last year, 40% of respondents said their employees had expressed interest in green products; that number increased by 10% in 2025, with fully half of all employees now showing signs of active engagement.

"Everyone on our team is engaged at this point," said Lindsay Bujalski, Pestco Professional Services. "Our culture centers around continually training our



technicians and pushing them to be the best they can — to be leaders in the industry. It's ingrained in them to go into every account with the mindset that they will investigate the issue, help the customer understand what's causing the issue, and recommend a solution, which will often include a green component."

## BACKING THE GREEN MOVEMENT

**Which group of employees is most interested in adding green products?**

	2025	2024
MILLENNIALS (AGES 29-44)	52%	43%
GENERATION Z (13-28)	29%	20%
GENERATION X (45-60)	11%	22%
BABY BOOMERS (61-79)	7%	15%
NO ANSWER	2%	1%

Source: Readex Research; 2025 Number of Respondents: 91;  
2024 Number of Respondents: 87

## THEY HEAR YOU

**Which customer demographic seems most responsive to green marketing messages?**

	2025	2024
MILLENNIALS (AGES 29-44)	41%	35%
GENERATION Z (13-28)	34%	34%
GENERATION X (45-60)	10%	17%
BABY BOOMERS (61-79)	7%	9%
NONE OF THESE	7%	5%
NO ANSWER	1%	0%

Source: Readex Research; 2025 Number of Respondents: 182;  
2024 Number of Respondents: 217

**50%**

**OF PMPs SAY  
THEIR EMPLOYEES  
HAVE EXPRESSED  
INTEREST IN USING  
GREEN PRODUCTS**

Source: Readex Research;  
Number of Respondents: 182

## ISING EMPLOYEE ENGAGEMENT

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

MY EMPLOYEES...	2025	2024
can communicate the difference between green and traditional pesticides	66%	58%
understand what makes the pesticides we apply green	55%	52%
feel green products are a positive development for the industry	39%	36%
believe green products are effective at controlling pests	24%	22%
Indicated at least one	84%	82%
None of these	16%	18%

Source: Readex Research; 2025 Number of Respondents: 182; 2024 Number of Respondents: 217  
(Respondents could select multiple responses)



A LEGACY OF CONTROL



# ESSENTIAL BOTANICAL INSECT CONTROL.

## STRONG INSECT CONTROL WITH A SOFT IMPACT.

ESSENTRIA <sup>®</sup> MOSQUITO & TICK CONCENTRATE	ESSENTRIA <sup>®</sup> IC PRO INSECTICIDE
<ul style="list-style-type: none"><li>• Kills mosquitoes and ticks while also repelling mosquitoes for up to 14 days</li></ul>	<ul style="list-style-type: none"><li>• Broad spectrum control of crawling and flying insects</li></ul>
<ul style="list-style-type: none"><li>• Repels and kills a variety of other listed flying and crawling insects</li></ul>	<ul style="list-style-type: none"><li>• Low fragrance; indoor and outdoor solution</li></ul>
<ul style="list-style-type: none"><li>• For use in and around buildings and structures as well as modes of transport</li></ul>	<ul style="list-style-type: none"><li>• Outdoor areas include barns, golf courses, boat docks, parks, lawns, and playgrounds</li></ul>
<ul style="list-style-type: none"><li>• Use in automated spraying systems, fogging systems, or mist blowers</li></ul>	<ul style="list-style-type: none"><li>• Low phytotoxicity; approved for use on cannabis and hemp</li></ul>

[in](#) [X](#) [f](#) [v](#) Go to [ZOECON.com](https://www.zoecon.com) for the full story

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