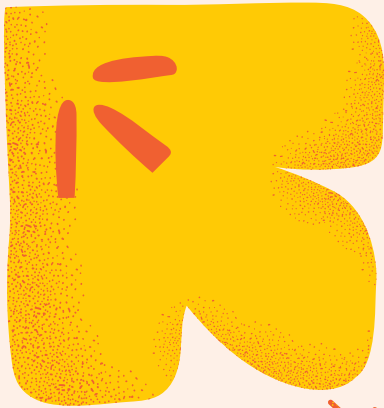


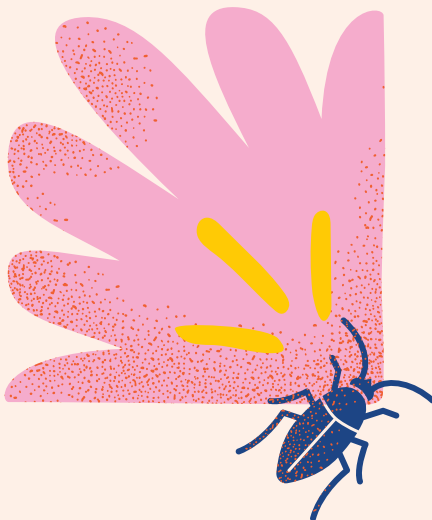
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Naturals Market Report

Inside

From Nice-to-Have to Core Expectation + Natural Products Find Their Niche + Customer Communication Is Key + What's the Word? + Building a Lean, Green Service Technician Team



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From Nice-to-Have to Core Expectation

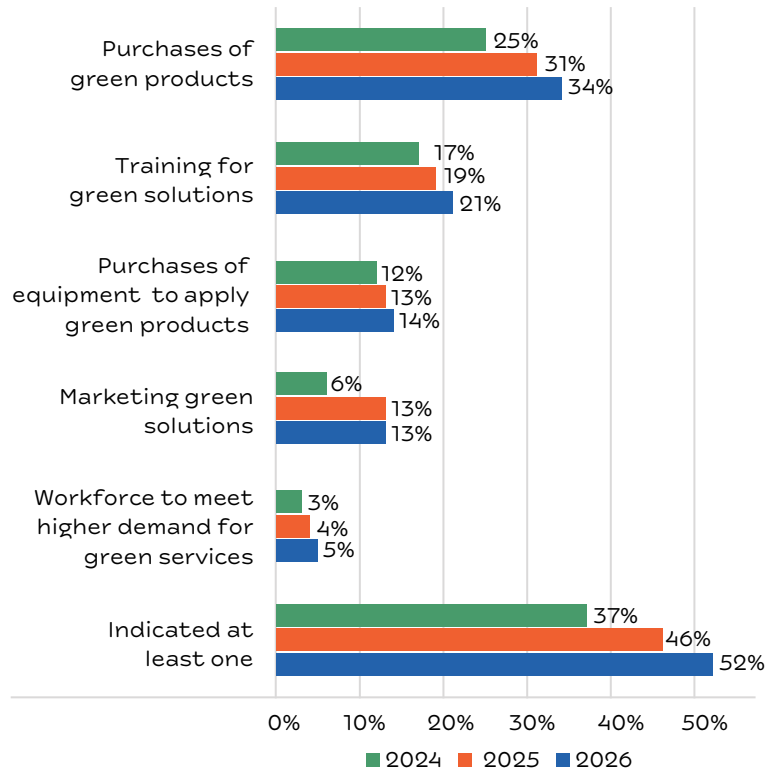
There was a time when customers who wanted “green” pest solutions had to look long and hard for a company that could accommodate their wishes. Not so today. With the industry’s shift to IPM and the ever-increasing availability of natural products, pest management companies can offer customers a range of treatment products and protocols to address their concerns, whether related to the health and well-being of their families and pets or the environment.

“It is our responsibility as a commercial pesticide applicator to do things as safely as we possibly can,” said Tanner Bigler, owner of Safe Chem Pest, Clearfield, Utah. “We want our service technicians to be safe in their roles so they can live long and fruitful lives, and we need to keep our customers safe from any chemicals they want to avoid. That doesn’t mean we carry *only* 25(b) products — we carry a full arsenal of products — but we always use them safely, according to the label and to what’s appropriate for the task at hand.”

SHARED COMMITMENT. It’s important to customers that their pest control company delivers that peace of mind. They also want to know that they’re patronizing a company that shares their commitment to environmental stewardship. Increasingly, pest management

Investing More Green

Which of these have you increased in the past year?



Source: Readex Research; 2024 Number of Respondents: 217; 2025 Number of Respondents: 182; 2026 Number of Respondents: 125 (multiple responses)

50% of PMPs feel it's important to be seen as environmentally friendly



companies are doing that through not only their service offerings but also their internal practices.

The 2026 State of the Naturals Market Report reflects this evolution. This year's survey found that, on average, 19.4 percent of the products PMPs across the nation use today are "green," "natural," "botanical," "organic" or "eco-friendly," according to their survey responses. That average rises to 22.3 percent when including only the businesses that said they use natural products — a 2.8 percent year-over-year increase.

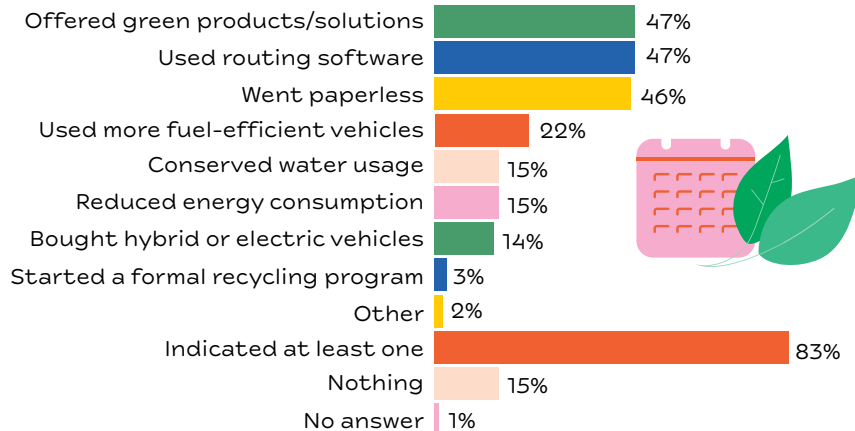
Pest management companies are also increasing their investments into their green programs. In 2026, more than half of PMPs (52 percent) said they have upped their investments in one or more areas related to eco-friendly solutions; that's 15 percent more respondents than just two years ago, when 37 percent reported spending more. Investments in products, training, equipment, marketing and workforce are all on the rise.

MOVING FORWARD. As the green evolution continues, many PMPs expect an increasing focus on natural solutions. They're listening to their customers and paying close attention as new natural products are being developed and marketed. They want to test new eco-friendly products with the potential for high efficacy and low impact. And they continue to make changes within their own companies to optimize their operational efficiency while reducing their carbon footprint. Routing software, paperless communications and more fuel-efficient vehicles are all supporting PMPs' efforts. "Except for our termite technicians' trucks, we've moved to cars," said Michael Clark, operations manager, BUGSolutions of Tennessee. "We specialize in servicing multi-unit accounts, and you don't need giant rigs in the back of a truck for apartments. It definitely helps with fuel efficiency."

IPM is being more widely embraced, too, as pest management professionals

It All Starts At Home

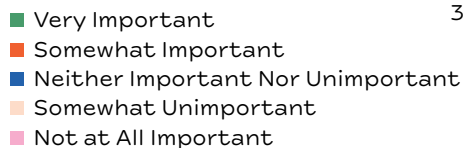
What has your company done to "go green" in the past year or two?



Source: Readex Research; Number of Respondents: 144 (multiple responses)

Through Green-Colored Glasses

How important is it to you that your service location is perceived by the public as environmentally friendly?



Source: Readex Research; Number of Respondents: 125

use to nonchemical solutions first.

Jeff Davis, owner, Nukingstreet Pest & Wildlife Control, Enfield, Conn., shared these insights: "There's a movement toward treating only if you have an active infestation rather than doing a lot of preventative maintenance. Over the next several years, I look for monitoring to play a stronger role as cameras and AI make it possible to not only capture pest activity but also identify species. When we *do* treat, we need to be conscientious stewards of the environment, whether we're using organic or synthetic materials."

Rick Wickham, general manager,

Green Shield Pest Pros, Columbus, Ohio, agreed. "I've always believed in IPM principles: Consider environmental, behavioral and structural controls first, then supplement with pesticide as the situation calls for," he said. "We believe less is more and focus on strategic, specific treatments that minimize application and maximize results. Everything revolves around the inspection and pest ID, and using pests' biology against them. If we do that consistently, we're going to win more battles than we lose. Our customers will appreciate that we're getting better results for them, and that's what it's all about." ■



Natural Products Find Their Niche

More PMPs reported using green products in customers' homes than in any other type of accounts. Of those who use natural products, 88 percent said they use them in residential accounts, a third (34 percent) in schools and daycare centers, 28 percent in commercial office buildings, 26 percent in food-handling facilities and 21 percent in healthcare facilities. Fewer than one in five use them in government buildings and public institutions, food-processing and production plants, warehouse/storage sites and other types of accounts.

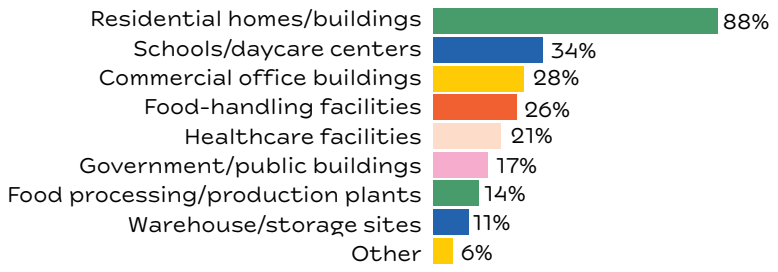
Whether they apply these products indoors, outdoors or both depends on the PMP, but a notable trend in 2026 is an increase in outdoor use: 46 percent of PMPs said they most often apply green products outdoors; that's a 7 percent year-over-year increase. Thirty percent said they apply green products equally indoors and out, and 24 percent reported using them most often indoors.

Michael Clark of BUGSolutions of Tennessee, which specializes in servicing multi-family accounts, has found a place for natural products in very specific locations. "For us, the green approach is more about protocol than products. The repellent nature of some green products isn't always ideal inside apartments because it can send pests running from one unit to another. We do like using wettable dust to drive cockroaches out from behind cabinets and fly mister systems using organic pesticides in trash compactor rooms. We also use green products for exterior perimeter applications to help keep ants out."

Safe Chem Pest's Tanner Bigler said his team uses certified organic products

Broad Application

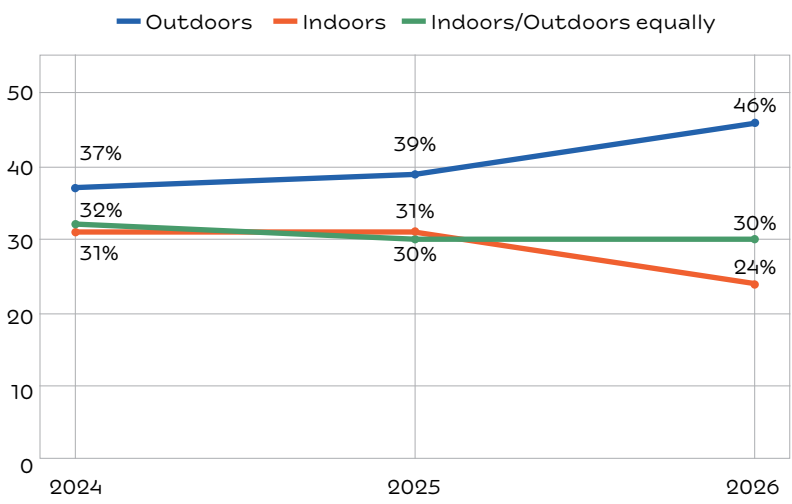
In which types of accounts do you use green products?



Source: Readex Research; Number of Respondents: 125 (multiple responses)

All The Ins And Outs

Where do you apply green products most often?



Source: Readex Research; 2024 Number of Respondents: 217; 2025 Number of Respondents: 182; 2026 Number of Respondents: 125

for every indoor residential treatment. "Beyond that, we give the customer the opportunity to choose the comfort level that fits them. If they'd like us to use some more traditional products to achieve longer-lasting efficacy and lower

the cost, we're happy to do that." Customers appreciate that empowerment, Bigler added. Ultimately, fewer than half of Safe Chem's customers choose a 100 percent organic protocol, mostly because of the cost difference.

PREMIUM PRICING. Safe Chem Pest is among the 34 percent of pest management companies that charge more when they use natural products. The primary reason isn't the cost of the products themselves, but rather the need for more frequent service calls. "We make sure customers understand that the additional visits and labor will cost them more," Bigler said. "A completely organic program costs about 60 percent more than our conventional pest protocol."

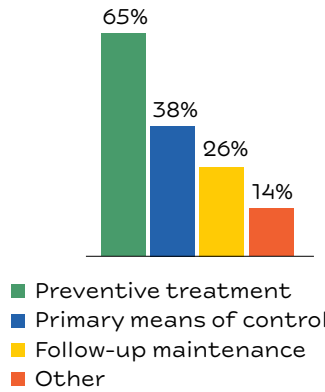
Jeff Davis of Nukingstreet Pest & Wildlife Control added, "It's just like buying organic food from the supermarket. These produces are going to cost more, but the people who want it understand and accept that. Natural products get the job done, but because they may not be super long-lasting, they require additional visits. We need to bill the customers who choose organics for a premium service."

ALL THE RIGHT REASONS. The most obvious reasons pest management companies are moving toward more natural product use are protecting the environment and safeguarding the health of customers, pets and service technicians who may come into contact with the products. Davis pointed out one more reason: Regulations are continuing to tighten, and PMPs need to be ready to use materials that are compliant with the new standards.

"If you consider what's happening with rodenticides — restrictions on second-generation anticoagulants, for example — it's easy to envision that eventually a lot of materials could be regulated out of the system," Davis said. "Smart businesses will get ahead of that curve and be ready to pivot and provide alternate solutions for customers. We can prepare by learning the slightly different methodologies green products require and accepting that it may take a little more labor to produce the same results with them. We also need to rely more strongly on IPM ideas like exclusion and cultural controls as we move the industry forward." ■

Before, During And After

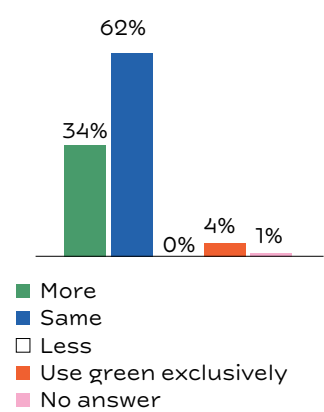
How do you typically use green products?



Source: Readex Research; Number of Respondents: 125 (multiple responses)

The Price They Pay

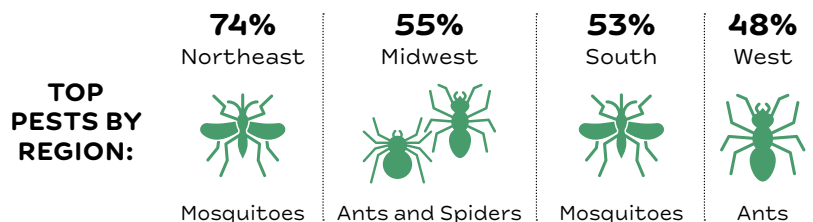
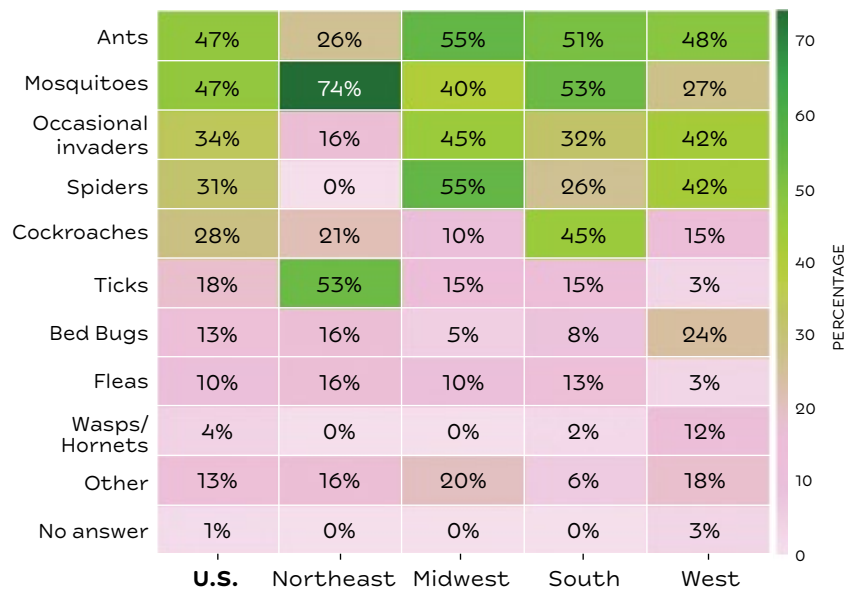
Do you charge more, about the same, or less for green products?



Source: Readex Research; Number of Respondents: 125

Pests Across The Nation

Which pests do you most commonly control with green products?



Source: Readex Research; Number of Respondents: 125 (up to three responses)



Let it Grow

The pest management landscape continues to evolve as residential and commercial clients increasingly ask for botanical options alongside traditional control methods. What many customers perceive as a "softer" approach, however, still requires solutions that are durable, repeatable, and effective in real-world environments.

The most successful botanical programs are rooted in science, supported by professional best practices, and cultivated into new service opportunities that help pest management professionals meet customer demands and expectations. Like a geranium, effective botanical pest control depends on a strong foundation, a well-supported structure, and the ability to grow and adapt over time.

The Roots Formulations Grounded in Science

The strength of any plant lies beneath the surface. For pest management professionals, the roots represent the rigorous science behind Essentria® botanical formulations. While plant-based actives were once viewed as limited alternatives, Zoëcon has redefined their role by engineering high-performance solutions grounded in core scientific principles.

Essentria® formulations leverage combinations of plant-based active ingredients, including rosemary, peppermint, geraniol, clove, and thyme oils.

This foundation comes from understanding where insects are biologically vulnerable and how they differ from humans and pets. Certain essential oils are known to interact with octopamine receptors in an insect's nervous system, receptors that humans and other mammals do not possess. This allows botanical formulations to be tough on pests while maintaining a favorable safety profile when used according to the label. These strong roots ensure Essentria® products deliver reliable performance over time and provide a science-backed foundation PMPs can trust.

The Stem Best Practices as the Path to Success

Strong roots alone are not enough. A plant needs structure to grow upward and remain stable. In botanical pest control, that structure is built through professional best practices.

While some PMPs do use botanicals as standalone tools in certain situations, success comes from integrating botanical products into broader IPM programs.

Botanical formulations are particularly well suited for sensitive accounts such as food handling facilities, health care settings, schools, hospitality environments, and residential properties with heightened needs.

Application timing, placement, and customer communication all play a role. When PMPs understand where botanical products fit within a service plan, they can set proper expectations, deliver consistent results, and maintain long-term account relationships.

The Leaves and Flowers

Differentiating and Growing the Business

As a plant matures, branches and blooms signal growth and vitality. In the same way, offering botanical solutions opens new opportunities for pest control operators while helping them stand out in a competitive market.

Botanical programs can support account retention, help meet evolving customer preferences, and open doors to new commercial specifications. PMPs can be seen as modern, responsive, and professional stewards of their customers' environments. Over time, these benefits translate into stronger reputations, broader service offerings, and sustainable business growth.

The Evolution of the Essentria Family Tree

At Zoëcon, ongoing product development is driven by operator feedback, continued scientific research, and a focus on improving the experience for both PMPs and their customers.

Essentria® IC Pro delivers broad-spectrum control using a refined blend of botanical active ingredients designed for sensitive environments, giving PMPs versatility across a wide range of labeled pests.

Essentria® G Granular Insecticide provides powerful botanical control for outdoor and perimeter applications, making it easy to extend botanical programs beyond the structure. Additionally, when particle drift is a factor, the granular insecticide format allows for application in rainy weather without drift or runoff concerns.

Essentria® Mosquito & Tick is a versatile solution that provides a crucial barrier against mosquitoes and ticks and other labeled nuisance pests. Designed specifically for outdoor spaces, it kills and repels mosquitoes for up to 14 days and kills ticks outright, supporting customer demand without sacrificing efficacy.

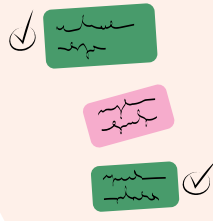
With science-backed formulations at the roots, professional application practices as the structure, and business growth as the result, botanical pest control continues to blossom into a reliable and valuable part of modern pest management.



Learn more about our full suite of solutions to end infestations and reduce callbacks

Essentria and Zoëcon with design are registered trademarks of Wellmark International.





Customer Communication Is Key

Sometimes it's the service technician who automatically reaches for a natural product in a certain situation; other times, a customer request drives usage. What's most important is that the technician knows what makes the product green and can explain both the product and its application to the customer.

"When customers ask for green products, we are open to that suggestion. We have a catalog of natural products available," said Camille Landry, managing partner, FullScope Pest Control, Cleveland, Texas. "But we talk with the homeowner first to understand their concerns and explain how green products work — that they may be applied differently and that recurring services might be more frequent than if we'd used something with more of a residual. Usually they're asking for all-green because they don't understand the IPM method. Once we share the rationale and safety levels of what we're doing, most end up not wanting only green. They see the value of our integrated approach."

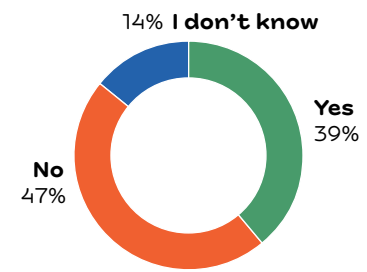
Croach Regional Manager Michele Cruzat, Tacoma, Wash., often expands that customer conversation to include the steadfast commitment of the broader industry and the EPA. "We have come a long way over the years, and customers rely on us to use the safest products possible for their families and the environment. When I share some of the history of pes-

ticides and explain the safeguards that are in place today to protect the environment 100 years down the road, it gives customers the confidence to allow us to choose the best products for their situation."

While these conversations seem to be taking place more frequently, PMPs still have plenty of educating to do. Only 39 percent of PMPs think their residential customers understand what makes a pesticide green, according to the 2026 State of the Naturals Market Study, even though 58 percent say their employees do. Further, 62 percent reported that their employees can communicate the difference between green and traditional pesticides. Get those employees talking! ■

SHINE A LIGHT

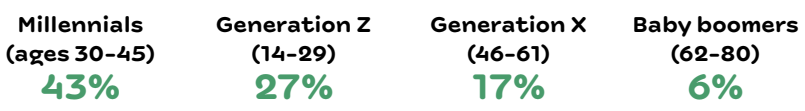
Do residential customers understand what makes a pesticide green?



Source: Readex Research; Number of Respondents: 125

WHO'S LISTENING?

Which customer demographic seems most responsive to green marketing messages?



None of these 6%

Source: Readex Research; Number of Respondents: 125



What's the Word?

Rick Wickham had been in the pest management business for more than two decades when he established Green Shield Pest Pros, so he was well aware of the direction the industry was headed. “I’ve been IPM since the beginning. I cut my teeth on inspection, baiting, dust, monitors, pheromones and structural controls. As customers become more focused on the safety of treatments, we’re here for them.”

Including the word “green” in his company name was no accident, Wickham added. It gives his team a competitive edge. “People need to know that we want to be good stewards of the environment — responsible with pesticides and taking a green approach to their pest issues. That resonates with certain people; it’s at the forefront of their minds. ‘Green Shield’ lets them know that we’re not going to show up, splash pesticides everywhere and call it a day.”

Once in a customer’s home, Green Shield technicians communicate what their green approach entails. Until demand for organic products ratchets up, that approach is more about IPM and applying pesticides sparingly than using all-natural products. Wickham likes to share this analogy: “If there’s an ant on a countertop and I drop a stone the size of a fifty-cent piece on it, that ant is dead. If I take that same ant and drop a 10-pound boulder on it, the ant is no

more dead than if I had used the smaller stone. In pest control, less is more.”

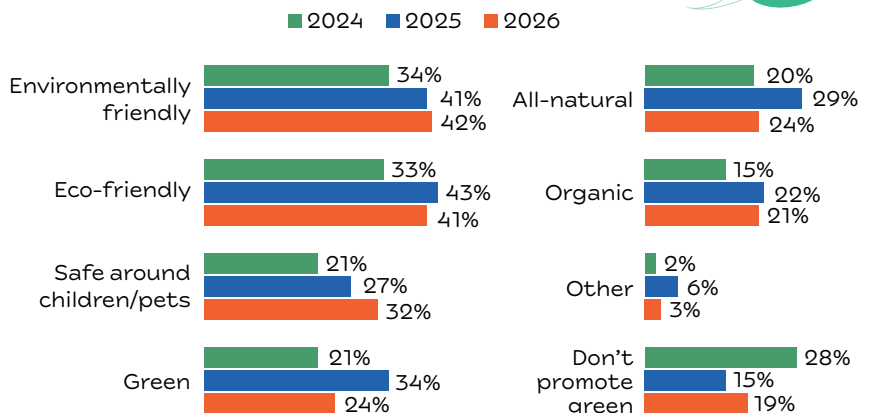
WORDS MATTER. It’s not only company names that can benefit from “green” language. Increasingly, pest management companies are using terms that reflect their environmental stewardship in social media posts and other marketing. While we’ve seen terminology evolve over the years, the hot descriptors of 2026 seem to be “environmentally friendly” and “eco-friendly,” with 42

percent and 41 percent of survey respondents, respectively, saying they use these to promote their green products and services. Other favorites are “safe around children/pets,” “green,” “all-natural” and “organic.”

“Whenever we market our services, we lean into our eco-friendly approach,” said FullScope Pest Control’s Camille Landry. “We want people to know that we are very conscious of, and committed to, their children, pets, home and overall safety.” ■

Talking The Talk

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



Source: Readex Research; 2024 Number of Respondents: 217; 2025 Number of Respondents: 182; 2026 Number of Respondents: 125 (multiple responses)



Building a Lean, Green Service Technician Team

As so many business leaders look toward the coming years with a stronger emphasis on natural products and protocols, fostering a culture of environmental stewardship will be key to success. About half (49 percent) of the PMPs who responded to the 2026 State of the Naturals Market Study said their employees have expressed interest in using green products; the other half (50 percent) said they have not. Younger generations — millennials and Gen Z — tend to have higher interest levels than older employees do, but companies striving to advance on the green front need a more unified perspective.

Croach's Michele Cruzat says that education and training fuel interest. "Service technicians may lean toward choosing a conventional product over a green product because they think green products don't work. Education can turn those perceptions around. We have weekly meetings where we talk about safety, following labels, using the proper

pesticides in any situation and avoiding the overuse of pesticides. We instill the reality that what we do today can affect us, and our children and grandchildren, years down the road."

At these training meetings, the Croach management team shares videos and articles highlighting environmental concerns — pets or birds of prey getting into unsecured rodenticides, for example — and invites ACEs, manufacturer reps, the Washington State Department of Agriculture experts and other speakers to share their firsthand experiences and knowledge. They also emphasize the importance of earning Continuing Education Unit (CEU) credits.

"We have found a huge difference in the knowledge and capabilities of technicians who simply retest each year versus those who participate in continuing education," Cruzat explained. "Croach commits to investing in employees by paying for those CEU courses so our technicians continue to learn and grow."

Entomologist Camille Landry of Full-

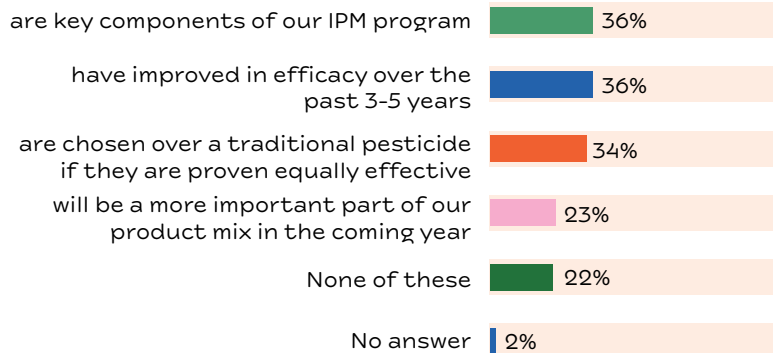
Scope Pest Control relies on the power of training as well. "I'm very passionate about the industry, and I know that sharing that passion includes sharing the science. We've been called 'excessive trainers,' but I don't think you can ever train too much," she said.

Landry's training includes weekly sessions that may focus on pest lifecycles, product applications, new products or newsworthy issues. In every case, she's sharing the science to ensure the Full-Scope team understands and can communicate the facts around green products and applications, as well as conventional products and broader IPM practices.

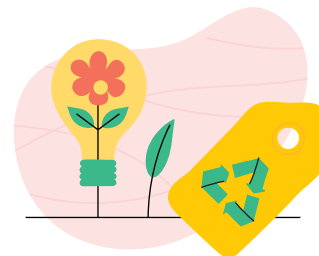
"Our commitment to training is reflected in how we've improved customer satisfaction," Landry said. "Our customers have come to expect that the technician who services their account will be forthcoming and knowledgeable. Every member of our team is educated enough to tell you what actives are in the product they're applying and why they're using it the way they are." ■

Walking The Walk

At my service location, green products...

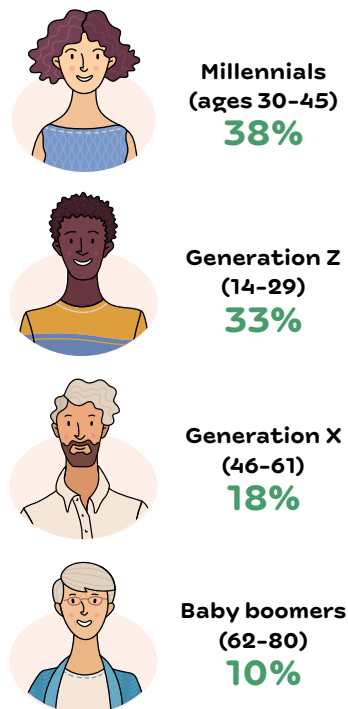


Source: Readex Research; Number of Respondents: 125 (multiple responses)



Who Cares?

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

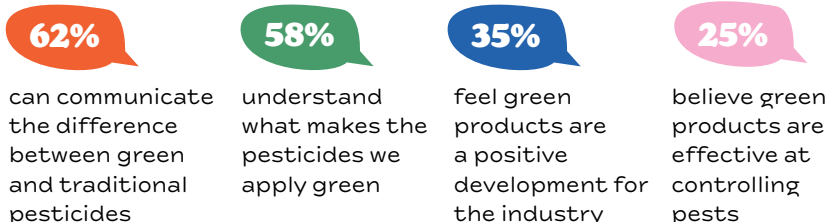


Adopting A Green Mindset

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



My employees...



None of these 8% No answer 1%

Source: Readex Research; Number of Respondents: 125 (multiple responses)

Source: Readex Research; Number of Respondents: 61 (those whose employees have expressed interest)

ABOUT THE SURVEY

The PCT 2026 State of the Naturals Market Study was sponsored by Zoëcon/Central Life Sciences and compiled by Readex Research, a privately held research firm in Stillwater, Minn. A sample of 5,557 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 144 respondents — a 3 percent response rate — via online survey from December 4 to December 22, 2025. To best represent the audience of interest, the majority of results are based on the 125 respondents whose company location uses green pest control products. The margin of error for percentages based on these 125 usable responses is plus or minus 8.7 percentage points at the 95 percent confidence level. Charts may not add up to 100 percent due to rounding.

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