

# State of the **NATURALS MARKET** 2023

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# Green Sweeps the Nation



**P**CT's annual State of the Naturals Market survey turned up some interesting results this year. Pest management professionals continue to believe in the importance of providing customers with the safest pest control programs possible while delivering results that keep them coming back. PMPs are also closely monitoring market trends — namely public attitudes toward environmental responsibility.

Across the nation, 78 percent of PMPs say that customers in their markets are very or modestly environmentally conscious. In the West and Northeast, that number rises to 88 percent and 83 percent, respectively.

## **NORTHEAST**

“I have found that coastal communities tend to be more environmentally conscientious,” says Mike Travers of EcoGeek Pest & Termite Control in Sandwich, Mass. “In our market area, we’ve observed a strong environmental movement and a growing awareness about the impact of harmful chemicals on human health and the environment. This has led to a significant increase in the demand for natural pest control solutions.”

Regulations and policies that support environmentally friendly practices play a role in the Northeast as well, adds Travers, who says that roughly 95 percent of the products his company uses are organic. “Our IPM approach works well with eco-friendly products; we turn to conventional products only when there are no other viable options — in situations where an infestation has already reached a critical level and immediate action is required to prevent further damage, for example.”

Travers’ 95 percent green-product us-

age is a far cry from the national average and even the Northeast average. Nationwide, PMPs report that 17 percent of the products they use are green; in the Northeast, it’s 24 percent. The Midwest checks in at almost 19 percent, with the South and West each reporting 15 percent.

## **SOUTH**

“We don’t see widespread demand for green services,” says Chad Highley of Environmental Pest Control in Lawton, Okla. “We come across accounts now and then where a customer requests a

green solution — a chiropractic clinic, certain pet owners and others who appreciate the offering — but for the most part, demand seems to be holding steady rather than increasing.”

### WEST

Bob Gordon agrees that the type of account plays a role in what customers are looking for. Gordon Termite Control services a lot of apartment and condo complexes in Los Angeles, for example, and those property management companies tend to be more concerned with cost and effectiveness than with the nature of the products used. Conversely, school accounts require the use of natural products, and Gordon is happy to comply.

“For us, being flexible enough to meet the needs of our varied customers has been key,” he says. “Once you understand your customer’s priorities, you can develop an effective program for them. Whether that’s a property manager looking to contain costs, a school looking to protect students or a resident who either does or doesn’t see the value in paying more for green services, you need to have options that make them comfortable with the services they’re receiving.”

## ABOUT THE SURVEY

The PCT 2023 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 4,087 pest control company owners, operators, executives and technical directors was systematically selected from the PCT database. Data was collected from 255 respondents — a 6 percent response rate — via online survey from Jan. 5-23, 2023. To best represent the audience of interest, the majority of results are based on the 193 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 193 responses is plus or minus 7 percentage points at the 95% confidence level. Charts may not add up to 100 percent due to rounding.

### MIDWEST

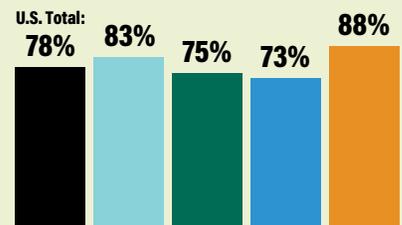
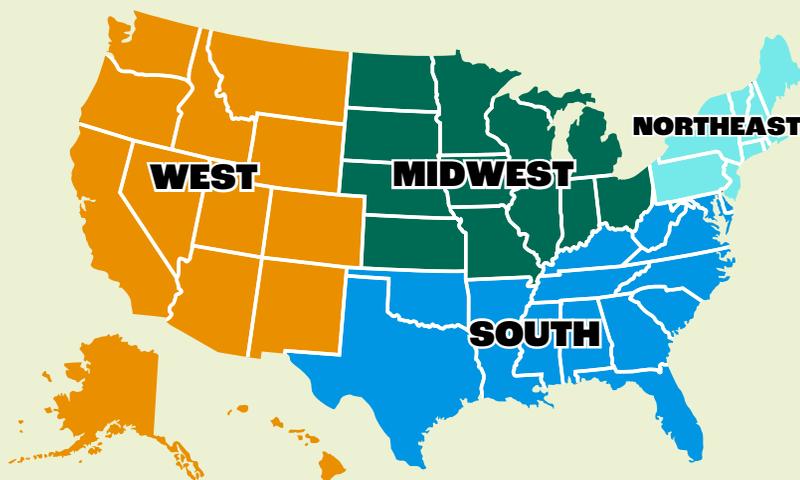
In Michigan, Daniel Feig of Advantage Pest Services says that most of his customers are environmentally conscious. “They want to make sure they’re protecting themselves, their kids, their gardens and their lawns. The first thing most people ask is, ‘Will it be harmful to us or the environment?’” he says. “Property managers are asking for green solutions more often, too. One of the companies I work with manages student housing, and they made sure from the start that I wouldn’t use anything toxic.

My approach for every account is to use as little material as possible to get the job done.”

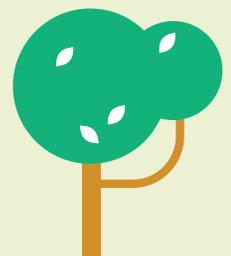
### NATIONWIDE

Sam Soto of First Rate Pest Solutions weighs in with the New York perspective, which seems to apply to the entire country: “For the people who care, they care a lot. Not everyone may be environmentally conscious just yet, but the number who are is growing and they are adamant about wanting green solutions. It’s our job to provide those for them.”

## PMPs WHO SAY THEIR CUSTOMERS ARE ENVIRONMENTALLY CONSCIOUS



*Respondents are those who reported "Very or Modestly Environmentally Conscious"; Source: Readex Research; Number of Respondents: 255*





# Partnership Is the Essential Ingredient

**C**ommunication between customers and PMPs is important to the success of any pest management program, but perhaps even more so with a green program. Thirty-one percent of PMPs say that it's more important when green products are used, while 60 percent say it's equally important in green and conventional programs.

"Customers need to understand that there is no magic pill. If they want a botanical program to work for them, they need to participate," says Lin Ellis, founder of Eco Friends Organic Pest Control in Texas. "We inspect the property, tell them where the pests are coming from, why they're coming and how they're getting in. Then we explain their role — cleaning up debris in the yard, addressing necessary exclusion work and maybe even planting some herbs in their garden to help deter bugs. Nine times out of 10, our clients cooperate 100 percent. In fact, some of them want to do the exclusion work themselves, so we explain how they can do that, too."

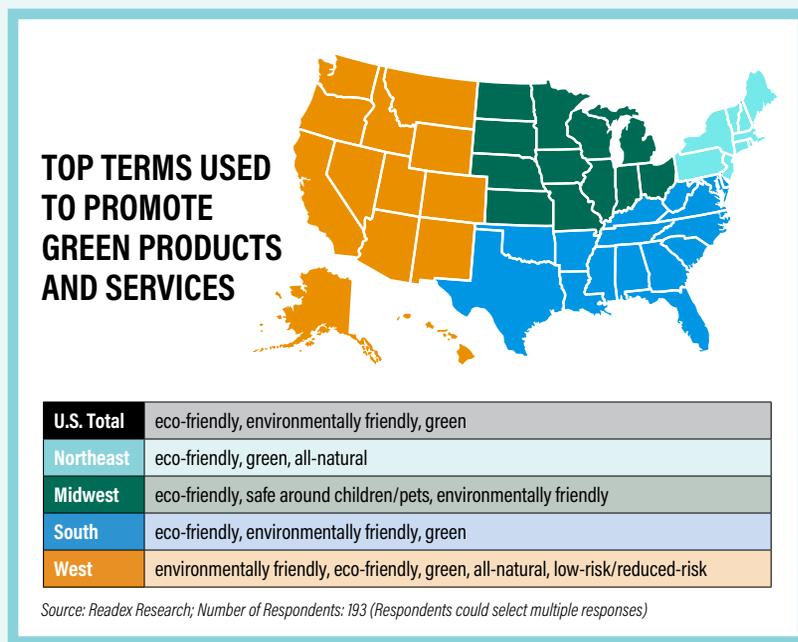
At Ecoskan Pest Solutions in California, Sam Tutton has collaborated closely with a city-managed museum account for the past five years. The account requires botanical pesticides and no rodenticides for its green program. Tutton shares that his city team is incredibly cooperative and

embraces the concepts of IPM. Over the years, however, he has found that not all municipal clients are open to building that type of working relationship.

"When we tell some decision-makers that this is a partnership, that we need cooperation and regular feedback from them, they say, 'No, the pest control is your job and we're not going to do the things you ask,'" he explains. "Another city will say, 'We get it: That's what inte-

grated pest management is. We're happy to be involved.' It has to be a strategic partnership to work. That starts with understanding how a green program works and agreeing to certain communication standards."

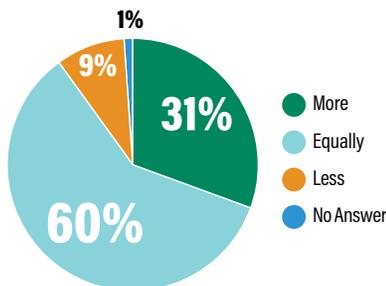
Part of the need for such close communication stems from the reality that a green program can require more time and visits, which builds time and expense into the program, says Chad Highley,





## IMPORTANCE OF COMMUNICATION

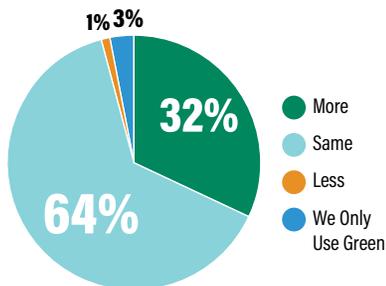
Is communicating with customers about their green program more or less important than with a traditional insecticide application account?



Source: Readex Research; Number of Respondents: 193

## PRICING PARTICULARS

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



Source: Readex Research; Number of Respondents: 193

Environmental Pest Control. “Customers and service technicians need more education so they understand that you don’t start out with peak efficacy upon initial application; you have to apply botanicals regularly to take advantage of their compounding effect,” he says. “It’s also important to explain the odor. Clients may expect the more traditional smell of pesticide, but instead they’re getting a strong sweet or peppery scent. That can be concerning for them. We explain that we’re using the same type of oils we put in our diffusers in the office. That tends

## GEN GREEN: Who’s Looking for Natural Solutions?

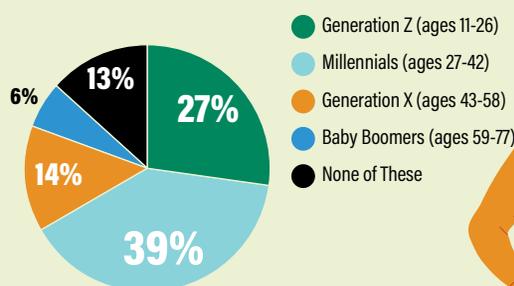
With the exception of PMPs in the West, who give Generation Z the edge, PMPs agree that millennials are more responsive to green sales and marketing messages than other generations. Gen Z is a close second, followed by Gen X and baby boomers. But individual companies have their own unique experiences when it comes to the generation(s) that approach them for green service most often.

“At Ecoskan, baby boomers have shown the strongest initial interest in green pest control, but Gen X and Gen Y [millennials] are more likely to actually engage. When we started out, many of our phone calls were from people in their 50s, 60s and 70s. They liked the idea of green pest control, but when we would go to their homes and start explaining the program, they would tell us they just wanted the pests gone, so we should use what we needed to use to get that done as quickly as possible,” says Sam Tutton. “Gen X and Gen Y customers, on the other hand, tend to hire us specifically because they want green pest control, and they are much more open to doing their part in terms of modifications — trimming trees, etc.”

EcoGeek Pest & Termite Control serves clients across generations. Mike Travers shares, “We’ve noticed that a very diverse group of people are interested in natural pest control solutions, including families with children and pets, seniors and individuals with allergies or sensitivities to chemicals. However, we have seen particularly high demand among millennials and Gen Z. They are more likely to prioritize sustainability and environmentally friendly products and services.”

## GREEN GENERATIONS

Based on your personal experience, what demographic group do you think is the most responsive to a green sales and marketing message?



Source: Readex Research; Number of Respondents: 225



to put them at ease.”

Mike Travers, EcoGeek Pest & Termite Control, says solid relationships are based on setting clear expectations and ensuring customers understand the benefits and limitations of natural products. “We have a thorough onboarding process that includes educating our customers about our eco-friendly pest control approach and the products we use,” he says. “We also have transparent communication channels in place, including regular check-ins and follow-up calls, to ensure that customers are satisfied

with the results and that any concerns are addressed in a timely manner. By prioritizing communication, we build trust and credibility with our customers, and demonstrate our commitment to providing effective, safe and sustainable pest control services.”

Adds Highley, “Whether we’re using conventional or green products, we always explain that we apply materials according to the label and as safely as possible. We live in this environment, too, and we take our responsibility to protect it seriously.”



### Clove Oil

Derived from the tropical evergreen *Syzygium aromaticum*, clove oil is extracted from the plant's stems, flower buds, and leaves. When blended into an insect control product, clove oil can be particularly effective against mosquitoes, ants, wasps, moths, flies, fleas, earwigs, silverfish, mites, aphids, cockroaches, and more.



### Cornmint Oil

Cornmint oil includes a high concentration of menthol and is commonly used as a mixing agent for natural insecticides because of its pleasant smell. Especially when blended with certain ingredients like sodium lauryl sulfate, cornmint provides effective control of several species of cockroaches and

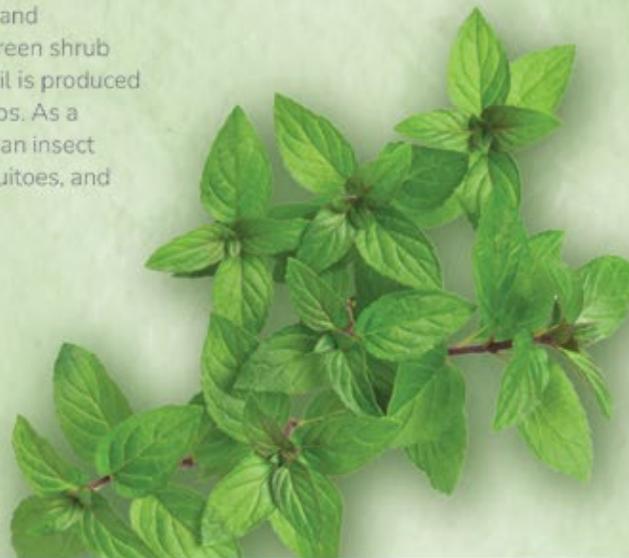


### Rosemary Oil

Rosemary, a widely used culinary herb, and rosemary oil are derived from the evergreen shrub *Rosmarinus officinalis*. Most rosemary oil is produced by steam distillation of the flowering tops. As a pesticide, rosemary is primarily used as an insect repellent of moths, fruit flies, lice, mosquitoes, and other target pests.

# Greener Insect Control Natural

As botanical insect control products gain more traction each year, clients have begun to fuel the natural insect control market. Welcome to the garden of greener insect control. We'll provide you with insight on some of the key FIFRA 25b exempt active ingredients.



### Peppermint Oil

Mint and mint oils are among the most active ingredients derived from nature. Selected members of the genus *Mentha*. As a pest control agent, peppermint and mint oils such as peppermint work primarily through non-toxic mode of action as repellents, but they also have anti-microbial properties.



Many of these EPA 25b exempt active ingredients have been used to repel pests for centuries, but controlling insects today requires a new generation of botanical insect control technology. The Essentria® product line from Zoëcon Professional Products is formulated to comply with, and often exceed, efficacy and performance claim standards established by the EPA 25b workgroup AAPCO (American Association of Pest Control Officials) providing pest management professionals with environmentally friendly insect control options.

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### Thyme Oil

Thyme is another herb commonly found in kitchens and gardens with insecticidal abilities. Cultivated in temperate climates, thyme, thyme oil, and thymol have demonstrated anti-microbial, anti-fungal, and insecticidal properties against ants, aphids, chinch bugs, earwigs, fleas, mealybugs, mosquitoes, centipedes, millipedes, scorpions, spiders, ticks, and more.

# Ingredients Pest Control

Have more and more questions about the ingredients that  
ingredients, where these time-tested actives come to life.  
ingredients and how they work to repel pests.



### Garlic Oil

From the plant *Allium sativum*, garlic is an incredibly popular herb, cultivated throughout the world and used as an insecticide with both repellent and biocidal properties. Its non-toxic capacity to repel target insects makes garlic an ideal active ingredient.

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### Geraniol

A naturally occurring essential oil, geraniol is found in many plants. Noteworthy amounts are typically found in familiar garden additions such as roses, geraniums, and even cilantro. When used as a pesticide, geraniol is found to be effective as a mosquito and tick repellent, or used against mites.



The latest addition, Essentria® IC Pro, represents the next generation of essential oil-based insecticides with its low fragrance and low phytotoxicity formula approved for sensitive indoor and outdoor applications.

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



# Where, When and How Natural Products Are Being Used



“**G**reen has been really good to me. About 80 percent of the time, I go to a green product first,” says Sam Soto, First Rate Pest Solutions. Why his preference for green products?

“It starts with health — my employees’ health, my health and clients’ health. My employees are using products all day, every day, so minimizing their exposure is at the top of my list. We are all committed to the environment as well,” Soto explains. “And, more often than not, green products used in an IPM program solve the problem. If they didn’t, they wouldn’t be my go-to.”

On the effectiveness point, Soto isn’t relying solely on anecdotal results. About five years ago, he collaborated with his son, then a statistics student at Boston University, on an in-house study pitting a green product against a conventional pesticide in dozens of bed bug accounts. Analysis of callback data revealed that the green product was at least as effective as, and sometimes more effective than, the conventional product. “Seeing it on paper — that I could effectively treat bed bug infestations without exposing my clients to traditional chemicals — confirmed that I was on track relying on the green solution,” Soto says.

Chad Highley, Environmental Pest Control, is a fan of natural products, too. “I like the green stuff and I’m intrigued by its potential,” he says. “My wife introduced me to essential oils, and I’ve been learning as I go. Since attending the Purdue conference in January, I’ve been really geeking out on the science behind them. They can do amazing things.”

Currently, Highley uses botanicals less than 10 percent of the time, but he continues to find new opportunities for their application. At one of his commercial accounts, where freestanding ATMs became the target of various pest infestations, he uses essential oil products

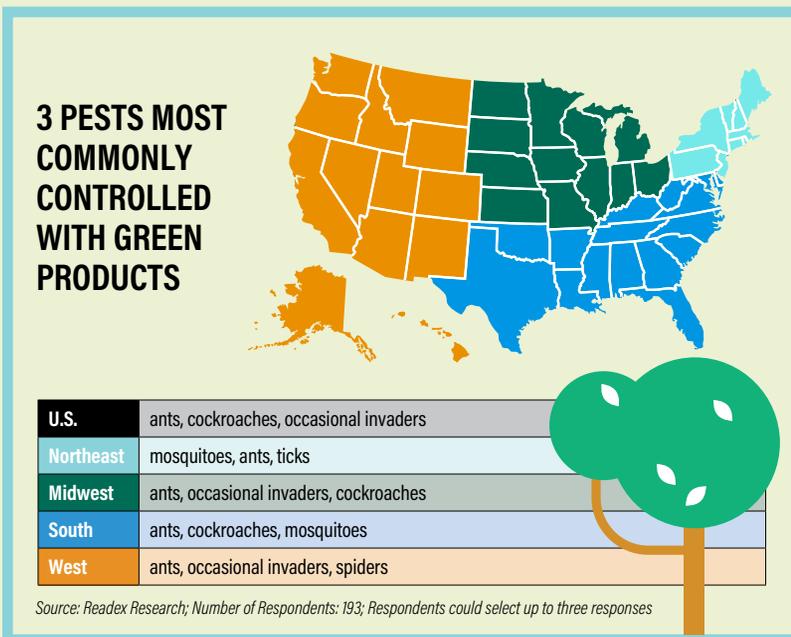
to deter spiders and an all-natural rodent repellent to keep mice from getting into the ATMs themselves. “The more we use these products, the better the residual. We’ve achieved excellent control, which is critical to the client since so many customers come into contact with those ATMs.”

More than a third of PMPs who use natural products (36 percent) report that they use them primarily in outdoor applications. Another third-plus (35 percent) use them mostly indoors. And

just under a third (30 percent) use them indoors and outdoors equally. There’s some variance in these percentages from region to region — notably, well over half of Midwestern PMPs (56 percent) use the products primarily indoors while half of Northeast PMPs (50 percent) use them primarily outdoors.

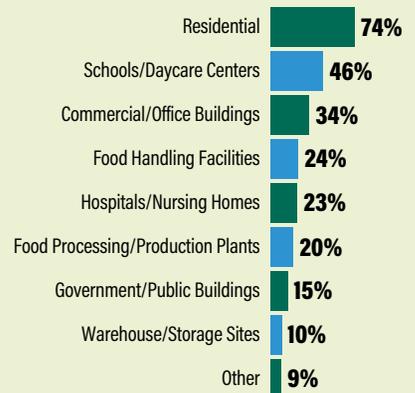
The three types of accounts most often treated with a green program are residential (74 percent), schools and daycare centers (46 percent) and commercial/office buildings (34 percent).

No matter where you use natural products, success lies in using them within a strategic, integrated plan that maximizes effectiveness and minimizes exposure. “Careful inspections and pest identification, structural modifications and monitoring all play an important role in an IPM program that incorporates green products,” says Bob Gordon, Gordon Termite Control. “And even where we’re not using botanicals, we are applying much less pesticide than we did 10 or 20 years ago.”



### GREEN ACCOUNTS EVERYWHERE

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

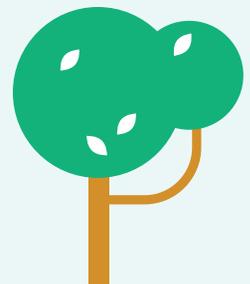


*Source: Readex Research; Number of Respondents: 193; Respondents could select multiple responses*





# Protecting People and Planet



**T**he pest management industry has come a long way in the green evolution. The rise of IPM and advances in natural product formulations give professionals many more choices for their teams and their customers. In fact, many PMPs find that their own passion for environmental stewardship makes them a little impatient waiting for the industry and general population to catch up.

“The industry is headed in the right direction, albeit slowly,” says Chad Highley, Environmental Pest Control. “Protecting the environment is key to our long-term survival not only as a society but as a species. It’s up to us to be good environmental stewards and take care of what we have. For us as PMPs, that means using IPM and being conscientious about what and how much we’re applying at accounts. For manufacturers,

it means being careful what’s sold to consumers, who haven’t been trained in responsible use.”

Sam Soto, First Rate Pest Solutions, adds, “I wish more companies would embrace green. A lot of them think it’s not as effective, but they’re wrong. You just have to give it a real chance — keep practicing it. You’ll find out like I did that it really can be effective as well as profitable.”

## The Power of Branding

When it comes to developing a separate, distinctive brand for green pest control services, 20 percent of pest management companies nationwide say they have. In the Northeast, that percentage is much higher, at 31 percent. The intent is to give customers a clear choice as they decide which type of pest control program they'd like.

Some PMPs go even further, putting the natural angle right in their company names. For some, that's because they offer only green services; for others, it's to convey their commitment to be as environmental- and health-conscious as possible with their treatments, even when they incorporate some conventional pesticides.

Lin Ellis, founder of Eco Friends Organic Pest Control in the Dallas-Fort Worth market, represents the former. So committed was she to her natural approach that she jumped through hoops to add the word "organic" to her company's name.

"When we started this company, we wanted to make it clear to people looking for a nonchemical approach that they had a choice, that they could get great pest protection through organic products," says Ellis. "We named our company Eco Friends Pest Control, but we wanted to say more than that. Here in Texas, anyone can say they're 'eco-friendly,' regardless of what products they use. But there are



stringent requirements for using the term 'organic.' I spent several years working with various agencies to earn the right to become Eco Friends Pest Control doing business as Eco Friends Organic Pest Control."

Those efforts paid off, Ellis says. "We saw an uptick in business almost immediately. People know to look

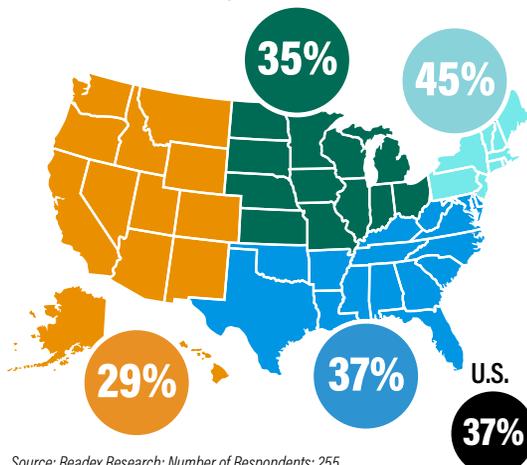
for the term 'organic' when they're grocery shopping and buying personal or household products, because they know a product needs to meet certain requirements to carry that label. When they saw that my company was using an organic approach, they jumped on it."

Mike Travers of EcoGeek Pest & Termite Control will use conventional materials only in circumstances where it's absolutely necessary. "We have been in the market with this eco-friendly pest control identity for six years. We took this approach because (a) we believe that it is possible to provide effective pest control services while minimizing the use of harmful chemicals, and (b) because the people have spoken. Our approach aligns with the growing demand for eco-friendly and sustainable solutions. Our identity and approach set us apart from other pest control companies.

"The response to our eco-friendly pest control services has been overwhelmingly positive. Our customers appreciate our commitment to reducing the use of hazardous chemicals. We see that in both their positive feedback and the growth of our business."

## SOME EMPLOYEES ARE GREEN TOO

Percent of PMPs who say using green products is important to the employees at their location:



Sam Tutton, Ecoskan Pest Solutions, has seen concrete evidence for public education. "When we first started our business a decade ago, there were a lot of community events and a lot of associations talking about sustainability

and the carbon footprint. Our phones were ringing off the hook with clients interested in green/botanical solutions," he says. "When 2020 hit and all the association meetings and community events were canceled due to COVID,

we noticed the phone calls for green started slowing down. As community awareness faded, we saw a notable decline in interest from potential clients. There is clearly a connection between awareness and action." 🌿

## GREEN ACTIVITIES AT PMPs' BUSINESSES

What has your service location done to go green? Which will you consider doing in the next one to two years?

	Have Done	Will Do in 1-2 Years
Migrating to paperless	36%	11%
Making green solutions available	33%	18%
Buying routing software	28%	7%
Buying more fuel-efficient vehicles	25%	23%
Buying hybrid or electric vehicles	6%	16%
Instituting a recycling program	17%	6%
Reducing energy consumption	17%	16%
Conserving water	16%	13%
Installing solar panels	4%	7%
Pursuing green building certification	3%	9%
Pursuing carbon-neutral certification	1%	3%
Nothing	33%	35%
No answer	1%	4%

Source: Readex Research; Number of Respondents: 255



# NEXT GEN BOTANICAL INSECT CONTROL.

STRONG INSECT CONTROL WITH A SOFT IMPACT.



## DID YOU KNOW?

Essentria® IC Pro is formulated to comply and often exceed efficacy and performance claim standards established by the EPA 25b workgroup AAPCO (American Association of Pest Control Officials). It also features a low fragrance and low phytotoxicity formula. This spray-friendly solution is water based and non-flammable, with approved label use for cannabis and hemp along with other sensitive treatment areas.



A LEGACY OF CONTROL.

