

STATE OF THE **SMALL FLY** MARKET



| Market Trends & Analysis

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STATE OF THE **SMALL FLY** MARKET



Pest control services targeting small flies are becoming an increasingly important part of the industry's offerings, particularly in commercial accounts where fruit flies and drain flies are common pests.

There are few pests more closely associated with fast food restaurants, neighborhood taverns and bars, and food-processing facilities than small flies, where these pests frequently find the conducive conditions readily available to reproduce rapidly, prompting frantic calls to PMPs.

"Small fly control is directly correlated with restaurants and bars," says Gerry Marsh, general manager, Patton Termite & Pest, Wichita, Kan.

Gary Rottler of Rottler Pest & Lawn Solutions, St. Louis, Mo., says commercial accounts generate most of his company's service calls for small flies, particularly those accounts where soda and beer are prevalent. "Food and beverage seems to be the worst," he says, "however we are also seeing an increase in health and medical offices as well," a sentiment echoed by Chris Christensen, owner of Christensen's Urban Insect Solutions, Lexington, Ky.

"We have these small fly issues most often in restaurant kitchens, usually in the dishwashing area, around the garbage disposals and in the bar," he says. "We also have issues sometimes in kidney dialysis centers."

Rottler says "any building with trash chutes" is a good candidate for small fly control services because of the food spillage that occurs in and around these locations, as well as any restaurants and bars where "soda and beer (spilled) on floors and walls makes it difficult to control flies."

In many cases, food-processing facilities also provide the conducive conditions for small fly infestations. "The small fly work we're doing is commercial accounts," says Mark Hoffacker, owner of Mission Pest Management, Greenville, Pa. "And the common thing that we see in our accounts — and that's mostly food-processing facilities — are issues with the tile floor (*see related story, page 4*). That seems to be a common denominator with small fly problems in commercial accounts."

A ROBUST MARKET. With the return to health of the commercial market following the lean years of the Great Recession, nearly three quarters of PMPs (72 percent) are now offering small fly services. And it's a growing part of the pest control industry's business with more than one-quarter of PMPs (26 percent) saying small flies have become a "more significant" part of their business in the past five years, according to the PCT State of the Small Fly Market survey.

In fact, in the past year alone, 33 percent of survey respondents said their small fly service calls increased in 2017, and 30 percent expect their



ADVICE FROM PMPs OFFERING SMALL FLY SERVICES

"I think what makes our program successful is strong communication and follow-up. Always check back with your customer to make sure what you agreed on is really happening! We leave written 'Help Us Help You' forms to reinforce what we have told them."

— Doug Foster, owner,
Burt's Termite & Pest Control,
Columbus, Ind.

"We have had major issues with fungus gnats in new construction homes for the last few years. It has mainly been in the June to July timeframe. They show up by the thousands in the bathrooms and sometimes the kitchen areas. They are usually slab homes and seem to be coming from the bath trap area."

— Tim Kendrick, technical leader,
Wayne's Environmental Services,
Birmingham, Ala.

"The most important thing is to set realistic expectations. The customer needs to understand it's a partnership. We can treat the breeding sites, but sanitation is the key to long-term elimination."

— Gerry Marsh, general manager,
Patton Termite & Pest,
Wichita, Kan.

small fly business to increase once again in 2018 (see charts on page 5).

For Patton Pest, which provides residential and commercial services, its commercial segment is growing steadily and, as Marsh noted, “I would predict as we grow in the commercial arena our small fly work will grow as well.”

Doug Foster, owner of Burt’s Pest Control, Columbus, Ind., shared a similar sentiment. “Our small fly work has grown substantially in the last two years because we have been aggressively getting after it. In our restaurant accounts we used to just tell them to clean the drains and ‘clean up’ the place. What we didn’t realize is that they really didn’t know how to clean (at least in detail) and had never been shown how to do it properly and what situations to look for. Shame on us! I expect (small fly work) to continue to grow because our technicians know what to look for and are getting better at communicating our ability to help.”

While Hoffacker says his company’s small fly business is solid, it could be better if economic conditions in his region were stronger. “We’re in an economic area that’s not booming (between Erie and Pittsburgh),” he says, which limits opportunities for growth, making Mission Pest Management’s relationship with current customers even that much more important.

“We’re not just about the money,” he says. Mission is about working cooperatively with the customer to resolve their small fly problems, no matter how long it takes. “It’s all about developing the relationship with the customer,” Hoffacker adds. “With newer customers it might

take a couple of months for you to earn their trust,” but once you do you’ll have a long-term ally in your battle against small flies. “I’m in this because we need to make a dollar,” he says, “but we also need to take care of our customers’ problems.”

Six hundred miles away in St. Louis, Mo., the city Rottler Pest & Lawn Solutions calls home, economic conditions are stronger. As a result, the company expects its small fly business to continue to grow with the help of some targeted marketing. “We perform inspections to identify problems and talk directly with our customers and show them ways we can help reduce and control fly prob-

lems,” says Rottler. “We also send direct mail to customers, as well as market through our website and social media.”

Steve Hawkins, owner and president of 5 Star Environments, New York, N.Y., shares similar optimism about the small fly market. “It’s become more of a consistent service for our company,” he says. “Whether fruit or drain flies, if they’re breeding in the drains, we provide a service for that, treating those locations and putting those accounts on a regular maintenance program.”

The result is happy customers and happy PMPs, a win-win for both parties, which is the basis for any strong business relationship. ✱

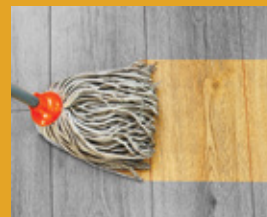
COMMON BREEDING SITES

“The key to solving infestations of small flies, such as fruit flies and phorid flies indoors, is to locate all the breeding sources and mitigate or eliminate them,” according to *The Handbook of Pest Control*. So, where are the most common breeding sites?

“Common breeding sites are floor drains, beer and soda overflow drains, and lines leading down to drains,” says Doug Foster, owner of Burt’s Termite & Pest Control, as well as broken floor tiles and beneath floor mats in restaurants “that rarely get pulled up to clean beneath.”

Small flies also breed in recycling bins that are seldom used, emptied or cleaned, according to Mohammed ElDamir, technical and training director, Adam’s Pest Control, Minneapolis, Minn., as well as the “debris that naturally accumulates in pipes, traps, sinks and drains.” Other common breeding sites include:

- Dirty mops and brooms
- Areas around leaky pipes and standing water
- Cracks and crevices
- Decaying fruits and vegetables
- Trash containers in out-of-the-way places
- Empty bottles being held for recycling
- Broken pipes under slabs



ABOUT THIS SURVEY

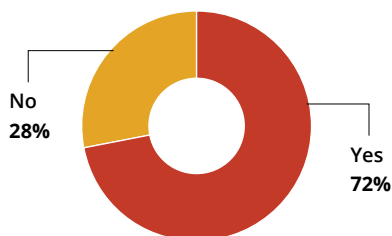
The survey for the State of the Small Fly Market Report was randomly selected from PCT’s e-mail list of PMP owners/operators, executives, partners and presidents. The survey was conducted by Readex Research, a third-party research firm, from April 17-27, with 169 total responses — a 4.1 percent response rate. Forty-seven respondents said they did not offer small fly control services. The margin of error for percentages based on 122 respondents who indicated their company location offers small fly control services is plus or minus 8.8 percent at the 95 percent confidence level. Results may not add up to 100 percent in some charts published in this market report due to rounding.



SPOTLIGHT ON SMALL FLY SERVICES

NEARLY THREE-QUARTERS OF PMPs OFFER SMALL FLY SERVICES...

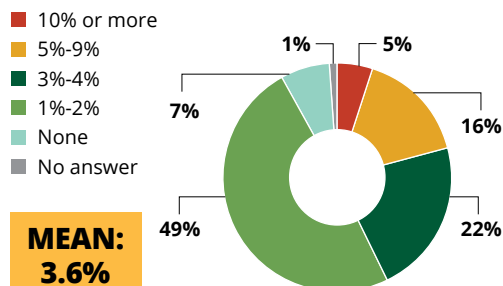
Does your company location offer small fly control services?



Source: Readex Research; Number of Respondents: 169

... AND IT REPRESENTS 3.6% OF TOTAL SERVICE REVENUE

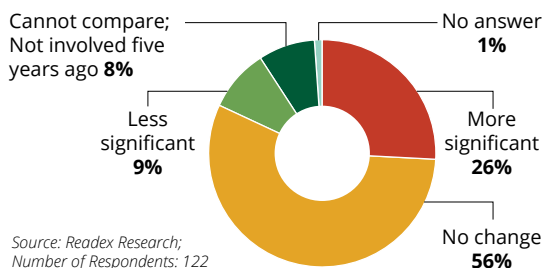
What percentage of your location's overall 2017 revenue was generated by small fly control services?



Source: Readex Research; Number of Respondents: 122

ONE-QUARTER OF PMPs CONSIDER SMALL FLIES A GROWTH MARKET...

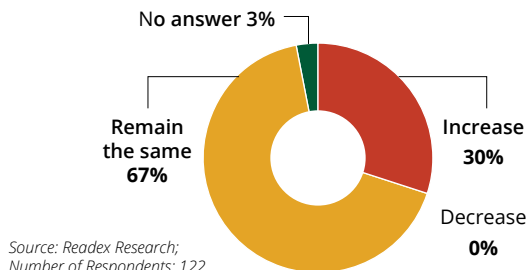
In the past five years, have small fly control services become a more or less significant portion of your location's business?



Source: Readex Research;
Number of Respondents: 122

... AND THEY EXPECT IT TO CONTINUE TO GROW

How do you expect your location's revenue generated from its small fly control services to change in the next year?



Source: Readex Research;
Number of Respondents: 122

ONE-THIRD OF PMPs SAY SMALL FLY SERVICE CALLS INCREASED IN 2017

Compared to 2016, how did the number of small fly jobs in your market area change in 2017?

Remained the same **61%**
Decreased **2%**
No answer **3%**



Source: Readex Research; Number of Respondents: 122



Small Fly

Nisus provides you with the tools and products to control the worst drain fly and cockroach problems. Even the tiniest food particles can support insect populations. Our unique system allows you to foam our special blend of products deep into drains, crack and crevices, effectively turning residual food particles into an insecticidal bait, helping to eliminate the toughest pest problems. This treatment provides powerful protection from pests and complements your sanitization process.

How well does it work?

Just ask Darrell Bush with Bush Pest Control, who was called in when the commercial kitchen of a 364-bed facility was facing shutdown by the health department because of an overwhelming small fly problem. Darrell explained the protocol to the health inspector who allowed the facility to remain open pending treatment. The treatment was done that evening and the problem was solved. The health inspection conducted the following week found zero flies.

TRUETECH[®] SPRAYERS • FOAMERS • MISTERS DRAIN FOAMING: MIXING INSTRUCTIONS FOR DRY FOAM

	Water	ProFoam	Nibor-D (5%)	DSV*
Use on visits 1 & 4. Creates residual bait & disinfects.	1 gal.	approx. 7 oz.	one 8 oz packet (or 5 scoops)	2 oz.
Use on visits 2 & 3. Creates residual bait & reduces	Water	ProFoam	Nibor-D (5%)	Bac-Azap

TRUETECH[®] SPRAYERS • FOAMERS • MISTERS DRAIN MAINTENANCE PROTOCOL

First Visit

1. Spray Nisus DSV™ solution directly into the drains.
2. Clean out gross soils and clean drains with a drain brush (dip or spray drain brush with DSV solution while cleaning).
3. Foam drains with Nibor-D®, DSV and ProFoam® Platinum solution.

Second Visit

1. Inspect drains for build-up and clean if necessary using brush dipped in DSV solution.
2. Foam drains with Nibor-D, Bac-Azap® & ProFoam.

Third Visit

1. Foam Drains with Nibor-D, Bac-Azap & ProFoam.

Fourth Visit

1. Inspect drains for build-up and clean if necessary using brush dipped in DSV solution.
2. Foam Drains with Nibor-D, DSV & ProFoam.

NOTE: Make sure the
approximately 10 min
DSV creates a slight

Repeat pattern on
weekly or monthly
service.



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Solution

Or ask the manager who came in the morning after a treatment with our TrueTech® system to the sight of hundreds of dead roaches being swept up by the staff.

Give us your toughest challenge and we'll help you get control of cockroaches and small flies.



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THE DYNAMIC DUO: DRAIN FLIES & FRUIT FLIES



While several species of small flies have the potential to cause problems in commercial accounts the two species that generate the most service calls are drain flies and fruit flies, according to the PCT State of the Small Fly Market survey.

When asked what small flies tend to be problematic in their market area, more than three quarters of respondents cited drain/moth flies (77 percent), followed closely by fruit flies (75 percent). In comparison, only 53 percent of survey respondents cited fungus gnats, with even fewer selecting phorid flies (43 percent).

When asked what species represented the largest percentage of their company's small fly service calls, 43 percent of survey respondents cited fruit flies, followed by drain flies (29 percent), fungus gnats (12 percent) and phorid flies (8 percent).

That's certainly consistent with the experience of Chris Christensen, owner of Christensen's Urban Insect Solutions, Lexington, Ky., who said fruit flies

and drain flies make the phone ring. Fortunately, his company has an effective treatment protocol in place regardless of the small fly species encountered.

For fruit flies, Christensen says "sanitation and moisture control is the biggest issue." So, when encountering this pest in a commercial account, he recommends "working with the customer to ramp up sanitation and using bacterial agents to break down breeding sites."

In this case, some PMPs use a foaming machine to apply product that will coat the surface areas of the drain and leave a residual. This kills fly larvae and other insects that may be feeding on the scum layer or that use the area for harborage.

Drain fly problems are "usually centered around slow-moving drains or improper disposal of wastewater," he says. In those cases, he recommends drain treatments to clean up the dirty water.

Phorid flies are "almost always associated with a damaged garbage disposal drain or a pipe with a slow leak allowing algae to develop, usually in a wall void," he says. That's why a thorough inspection is important. "Find the source of the breeding and eliminate it. Otherwise, all you do is harvest adult flies," Christensen says.

Fungus gnats in offices are almost always the result of "overzealous staff watering house plants," Christensen says. To solve the problem, "try to get the customer to water less and use some insecticidal soil treatments" to eliminate the flies.

Mohammed El Damir, technical and training director of Adam's Pest Control, Minneapolis, Minn., attributes the success of his company's small fly program to "persistence and good com-

munications. Always inspect to locate fly breeding sources and entryways," he recommends, "and keep reminding customers to eliminate or reduce all conditions contributing to the survival and presence of small flies."

Steve Hawkins, owner of 5 Star Environments, New York, N.Y., goes as far as "putting customers on a regular maintenance program" and providing a "punch sheet" of step-by-step recommendations for resolving small fly problems in an account. He'll provide on-site training to educate customers and their staff about how to prevent small fly infestations.

"We review our clients' cleaning protocol and take pictures of problem areas we find when doing our service," says Gary Rottler, co-owner of Rottler Pest & Lawn Solutions, St. Louis, Mo. By educating customers about conducive conditions and pro-actively communicating how a dirty mop or a leaky pipe can contribute to a small fly infestation, Rottler enhances his company's chances of resolving the problem with the help of his customers ... and industry product suppliers. "Fly control is a great challenge for our industry and it is nice to see manufacturers responding with good products and training to help us identify problems and good solutions for our customers," he says. "Hopefully this equates to additional revenue and opportunities for our industry."

The result? Small fly control "has been good to me," says Scott Fisher, owner of Scotty's Pest Control in Decatur, Ill. "I'm here to solve my customers' problems... and when you've done a good day's work, you'll sleep well." 🍷



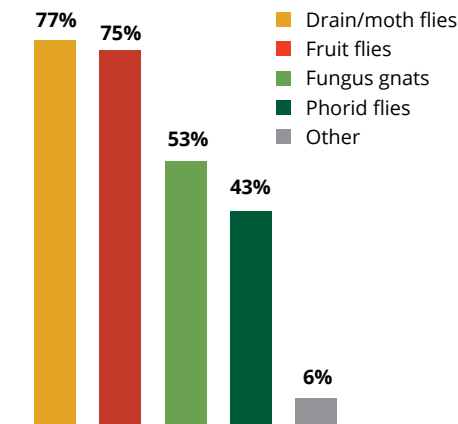
"Small fly issues are frequently misidentified by the service technician, thus determining breeding sites is not possible. Even well-established companies habitually misidentify small flies and search in the wrong areas. If you are unsuccessful, make sure you have identified the fly correctly."

— Dr. Chris Christensen, Christensen's Urban Insect Solutions, Lexington, Ky.



SPECIES OF SMALL FLIES CAUSING PROBLEMS

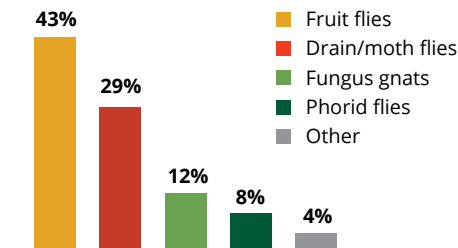
What small flies tend to be problematic in your market area?



Source: Readex Research; Number of Respondents: 122

DRAIN FLIES & FRUIT FLIES PROMPT MOST CALLS

What small fly represented the largest percentage of your location's service calls this past year?



Source: Readex Research; Number of Respondents: 122

THE PRIME SUSPECTS

The most commonly encountered small flies include drain flies, fruit flies, fungus gnats and phorid flies. Key identifying characteristics of each are featured below to assist PMPs in their proper identification.



Drain Flies

Psychoda spp. and *Telmatoscopus* spp.

- 1/16 to 1/4 inch long
- Yellow, brownish-gray or black
- "Hairy" or "fuzzy" appearance
- Pointed wings held roof like over the body when at rest
- Long antennae

Development Time: 7 to 28 days



Fruit Flies

Drosophila spp.

- 1/8 inch long
- Dull yellow-brown to dark brown
- Most pest species have distinctive red eyes
- Wings have two "breaks" in the leading edge (vein) nearest the body
- Antenna has feathery bristle

Development Time: 7 to 21 days



Fungus Gnats

Various Species

- 1/32 to 7/16 inch long
- Black, brown or yellowish
- "Mosquito-like" in appearance
- Wings have two "breaks" in the leading edge (vein) nearest the body
- Long, thin wings and legs; first segment of legs are long

Development Time: 17-28 days



Phorid Flies

Various Species

- 1/64 to 1/8 inch long
- Black, brown or yellowish
- Thorax is humpbacked in appearance
- Top edge of wings have two heavily sclerotized veins
- Short antennae

Development Time: 14 to 28 days

SMALL FLY TIPS FOR COMMERCIAL KITCHENS



Issues involving small fly species can prove frustrating to solve or control, particularly fruit flies and phorid flies. These flies can breed in the smallest amounts of moist organic materials and finding all such breeding spots is the most difficult part of small fly control.

A key part of fly management in commercial structures is the maintenance and sanitation practices of the facility. How a particular commercial kitchen cleans its floors (mopping vs. hose washing vs. steam cleaning) plays a role in how and where small flies might be breeding. Of these, hose washing of floors may create the best conditions for fly breeding due to the amounts of moisture put into the environment. Working with the facility management to look at cleaning practices may be necessary before any success with a small fly infestation is realized.

Fruit Flies. Fruit fly larvae feed on yeasts that primarily grow in freshly decaying organic materials, typically fruits and vegetables and garbage. Check stored produce in storerooms and move fruits and vegetables around to check for adult flies and over-ripened/rotting produce. Inspect trash receptacles for cleanliness and inspect garbage disposals. Check for pieces of produce dropped onto floors under shelves, tables, etc. Inspect drains for beverage dispensers and check the beverage station syrup lines for leaks or the presence of flies. Be aware that some fruit fly issues may originate in dumpster areas outside or in elevator shafts.

Phorid Flies. Phorid flies are capable of breeding in more types of materials than any other structure-infesting fly which is why they can be the most difficult to control. In addition to those sites mentioned for fruit flies, focus inspections on drains and drain lines. Phorid flies are often found in heavily

decaying organic material such as found when drain lines leak. They also will breed in organic matter accumulated in cracks at floor level. For chronic phorid fly infestations, beware of possible drain line breaks under slabs or in crawlspaces. Phorid flies are also known to breed in animal carcasses within walls and other voids.

Moth Flies. These flies prefer more aqueous (wet) environments, typically drains and sump pumps. Look for areas where water accumulates along with organic materials. Where floors are washed with hoses, moth fly larvae may be found in standing water along baseboards or under items that sit on floors (i.e., dish racks, soap bottles). Beware of possible drain line breaks under slabs or in crawlspaces.

Fungus Gnats. These gnats are fungus feeders and are almost always associated with moist soil indoors. Inspect soil in potted plants and atriums. The key to control is drying out the soil and avoiding overwatering. On occasion, mold due to water leaks in walls or ceilings will be the source of fungus gnats.

Control Tips. Improved sanitation/cleaning practices by customers is critical for control of fruit and phorid flies. Regular cleaning of drains is important for moth flies and management of watering practices necessary for fungus gnats.

Engaging commercial customers in utilizing bacterial-based cleaning products can help minimize the potential for small fly issues long-term and can assist in remediating a current problem. Fruit fly traps are useful in helping to pinpoint areas where breeding is occurring. Such traps also remove adult flies until breeding sources are found and removed.

Residual treatments play little role in controlling small flies. Where larger

infestations occur, however, spot treatments to surfaces where flies are landing or resting — particularly near known or suspected breeding sites — can help kill adult flies.

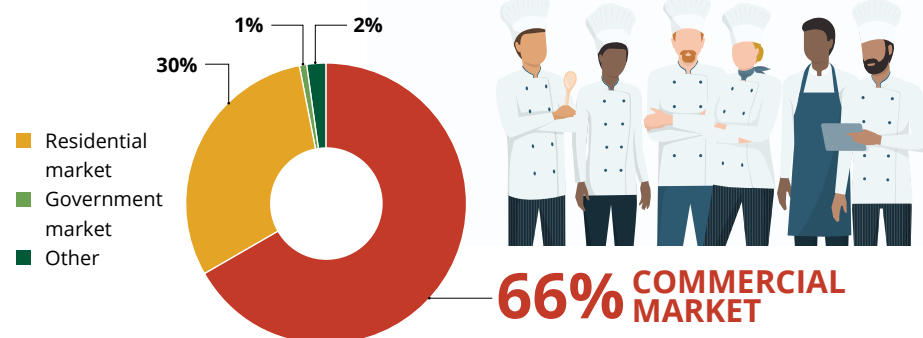
Once breeding sources have been found and cleaned or removed, remaining adult flies may be killed by application of a space treatment, following label directions. Space treatments also may be used to knock down large populations of flies while discovery and removal of

breeding sites is ongoing. Such treatments will not eliminate an infestation but will reduce numbers of flies seen during the control effort.

An important reminder is for PMPs to be persistent and diligent. Often, many breeding sources are present and finding all of them initially is unlikely. It may take numerous inspections and a number of weeks to remediate a small fly infestation to the customer's expectations. 🦟

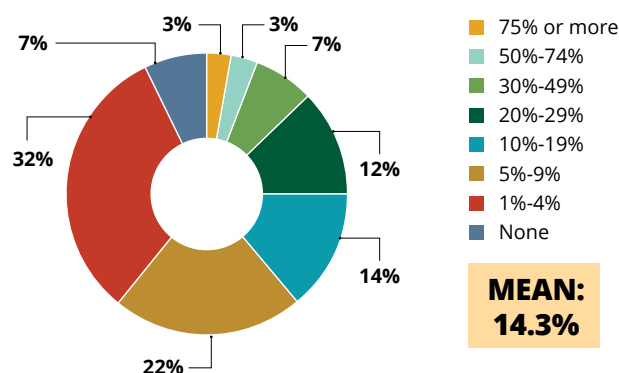
COMMERCIAL MARKET OFFERS GREATEST OPPORTUNITY...

What small fly control market generated the most revenue for your location in 2017?



... WITH 14 PERCENT REPORTING REGULAR PROBLEMS

What percentage of your location's commercial kitchen customers have regular problems with small flies (at least once per quarter)?



CREATE AN EFFECTIVE

SMALL FLY PROGRAM

FOR YOUR COMPANY.

We provide you with the tools and products to control the worst drain fly and cockroach problems. Even the tiniest food particles can support insect populations. Our unique

system helps you control flies and other pests in your customers' restaurants and commercial kitchens.

Using TrueTech® equipment, foam our special blend of products deep into drains, cracks and crevices, effectively turning residual food particles into an insecticidal bait, helping to eliminate the toughest pest problems. This treatment provides powerful protection from pests and complements your customers' sanitization processes.

Give us your toughest challenge and we'll help you get control of cockroaches and small flies.

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