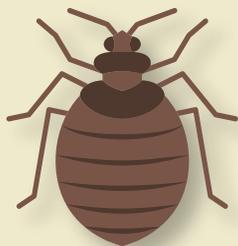
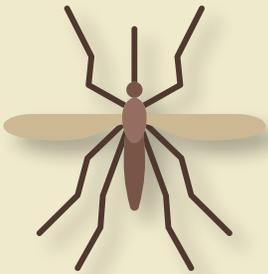




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The State of the **NATURALS MARKET** *2021*



INSIDE: ALL ABOUT GREEN PEST MANAGEMENT

- » Why Green Solutions are Taking Root
- » Where and How Green Products are Used
- » Green Marketing and Customer Insights
- » The Outlook for Green Products and Services
 - » Exclusive Research
 - » And More!



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54%

of PMPs agreed the introduction of green products has been a positive development for the industry.

Source: Readex Research; Respondents: 272

GREEN Takes ROOT

Here's a surprise you may not have expected: The COVID-19 pandemic made more consumers want to buy green products and services.

According to an April 2020 survey of 1,000 consumers by Chicago-based management consulting firm Kearney, 48 percent of consumers were more concerned about the environment since the beginning of the pandemic, and 55 percent were more likely to purchase environmentally friendly products.

Pest management professionals said changing consumer attitudes have led to growth in the green pest management sector.

Arkadia – Eco Pest Control, which only uses green products, had a banner year in 2020, generating \$1 million in revenue, said President Mark Constantino. He said he believes his Randolph, N.J.-based company is “the largest in the U.S. as far as all-green goes.”

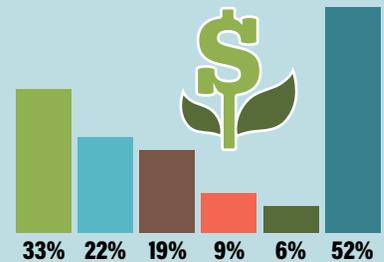
Abra Kadabra Environmental Services in Mound, Minn., also picked up new customers for green pest control. “We have a healthy number of clients who are coming from other companies that do not provide that type of service,” said President Matthew Eickman.

As such, some companies dedicated more resources to green pest management. According to the 2021 PCT State of the Naturals Market survey, which was sponsored by Zoëcon/Central Life Sciences and compiled by Readex, an independent research firm, 33 percent of PMPs said their companies purchased more green products in the past year, and 22 percent said they made more time to teach employees about green products and services.

The use of natural, botanical, organic and eco-friendly products was key to providing a green service. More than half of PMPs (54 percent) said the introduction of green products has been a positive development for the industry. 🌱

PMPs ARE INVESTING

How have your resources increased for green operations in the past year?



- purchases of green products
- time for education to learn about green products and services
- purchases of equipment to apply green products
- marketing of green products and services
- manpower to meet increased demand for green services
- none of these

Source: Readex Research; Respondents: 220; multiple answers

What Is GREEN PEST CONTROL?

The foundation of green pest control is integrated pest management (IPM), which includes practices like improving sanitation, performing exclusion and modifying habitats, among other activities.

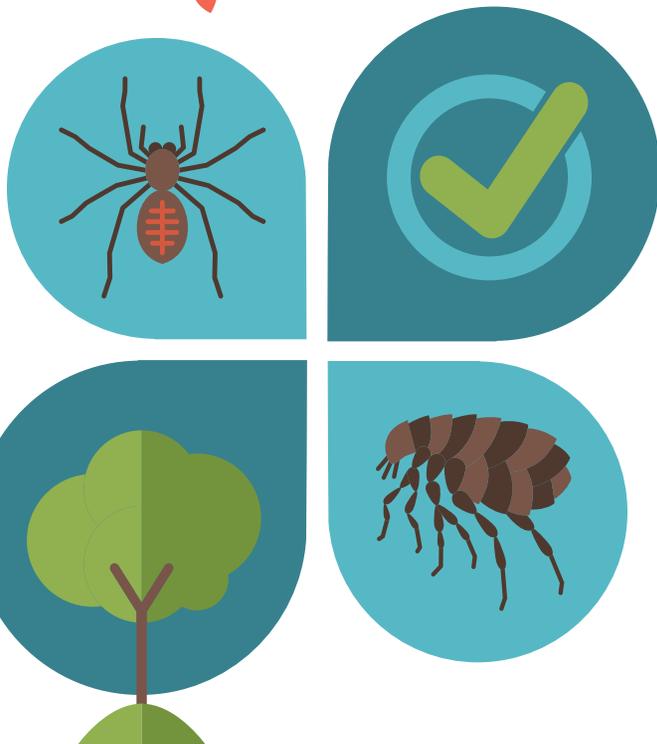
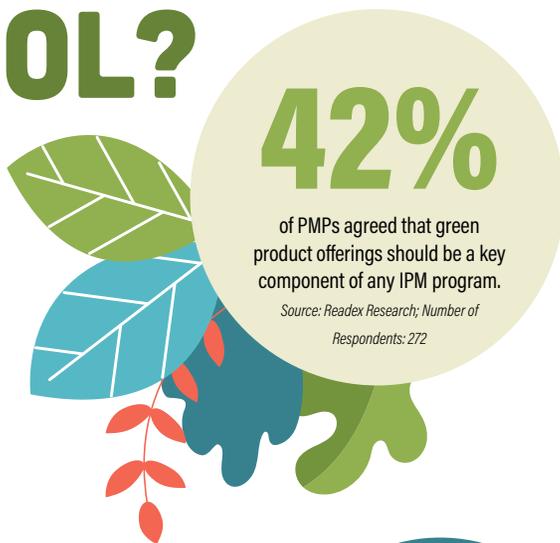
When control products are necessary, some companies strictly use FIFRA-exempt materials, such as botanical oils, diatomaceous earth and boric acid, while others may employ low-risk or conventional pesticides. Some services take a hybrid approach that falls somewhere in between.

Nozzle Nolen, based in West Palm Beach, Fla., gives clients a choice with two IPM-based approaches. Its All-Natural Treatment program uses only botanical and naturally derived materials. Its conventional service precisely applies minimal-risk materials to the exterior. “We will opt for baits, desiccant materials and vacuums for removal whenever possible,” explained Dean Trevisol, the company’s organizational trainer. For bed bugs and drywood termites, the company’s go-to treatment method is heat.

Parker Eco Pest Control solves about 80 percent of pest problems using IPM and green control products. But if a pest problem escalates or the client’s tolerance for an occasional insect is non-existent, technicians will apply a conventional pesticide with the client’s consent, said co-owner Wesley Parker.

At Abra Kadabra Environmental Services, green pest control is “really about the process, not necessarily a product,” said Matt Eickman. Staying true to the IPM process is not easy for some companies. “A lot of pest control companies talk about IPM, but the actual utilization and implementation of that isn’t necessarily widespread from what I’ve seen,” he said.

According to the 2021 PCT State of the Naturals Market survey, 42 percent of PMPs agreed that green products should be a key component of any IPM program. 🌿



ABOUT THE SURVEY

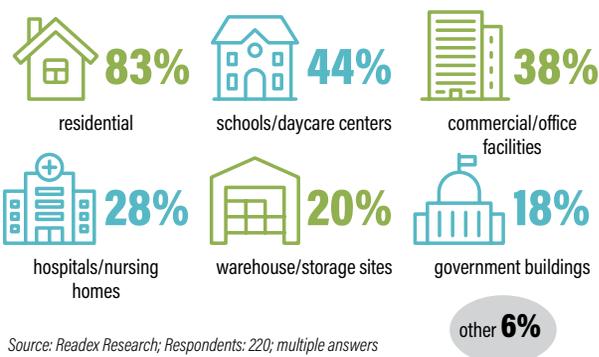
The PCT 2021 State of the Naturals Market survey was sponsored by Zoëcon/Central Life Sciences and compiled by Readex Research, a privately held research firm in Stillwater, Minn. A sample of 3,922 pest control company owners, operators, executives and technical directors was systematically selected from the PCT database. Data was collected from 272 respondents — a 7 percent response rate — via online survey from Jan. 22 to Feb. 1, 2021. The margin of error for percentages is plus or minus 5.7 percentage points at the 95 percent confidence level. Charts may not add up to 100 percent due to rounding.



Where and How PMPs GO GREEN

LOCATION, LOCATION, LOCATION

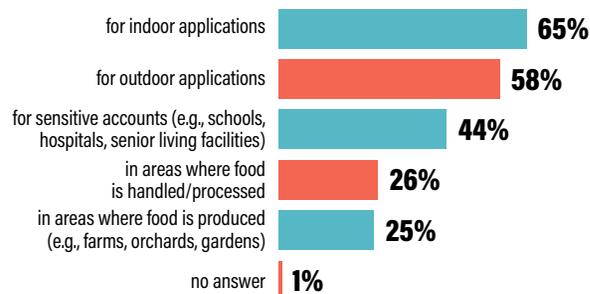
At which accounts do you most likely use green products?



Source: Readex Research; Respondents: 220; multiple answers

MOST FREQUENT APPLICATIONS

Green products are most likely to be used...



Source: Readex Research; Respondents: 220; multiple answers

WHAT CUSTOMERS THINK

Do you think green pest control product options are more or less top of mind among your customers than they were five years ago?

	Residential Customers	Commercial Customers
more top of mind	42%	29%
same	35%	41%
less top of mind	22%	26%
no answer	1%	3%

Source: Readex Research; Respondents: 272

Clark Pest Control, a Rollins company based in Lodi, Calif., has a service featuring green products. It's not a big segment of the business, but it is one that is drawing more attention.

"We do see an increasing amount of both residential and commercial customers seeking out a green service and for different reasons," said Blair Smith, the company's technical manager.

According to the 2021 PCT State of the Naturals Market survey, PMPs were most likely to apply green control products in residential settings (83 percent), schools/daycare centers (44 percent) and commercial/office facilities (38 percent).

Most often, green products were applied indoors (65 percent), outdoors (58 percent) or at sensitive accounts (44 percent), including schools, hospitals and senior living facilities.

Smith said homeowners were learning about green options online and then asking about these offerings for their homes, while commercial clients tended to be organic facilities that must adhere to strict protocols.

Awareness among residential consumers had the biggest jump: 42 percent of PMPs said green pest control products were more top of mind for residential customers than five years ago. That's up from 36 percent of PMPs who felt this way in PCT's 2019 survey.

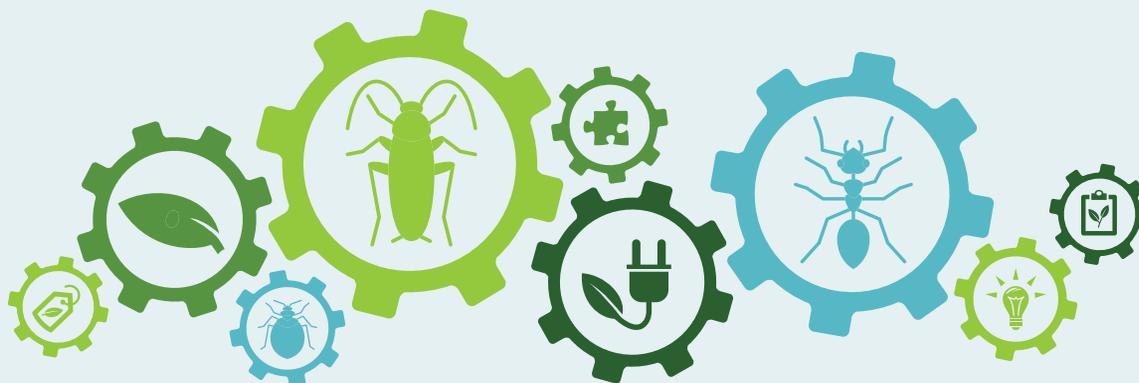
PMPs said green products most commonly are used to control ants (53 percent), cockroaches (36 percent) spiders (35 percent) and occasional invaders (33 percent).

Matt Eickman, Abra Kadabra Environmental Services, said his green mosquito and tick control program featuring botanical products is a popular offering driven by specific concerns. "The kids and the pets and water, that's where green really comes up a lot," said Eickman.

It's also a service he feels good providing. "It doesn't feel right to me to spray a pyrethroid into a kid's playground," explained the father of two.

Twenty-nine percent of PMPs used green products to control mosquitoes, found the PCT survey. 🌱

Filling the Toolbox WITH GREEN PRODUCTS



Pest control companies are adding more green products to their repertoire.

On average, 21.3 percent of pest control products used by companies in the past year were natural, botanical, organic or eco-friendly, found the 2021 PCT State of the Naturals Market survey. In the 2019 survey, the average was 17.1 percent.

More than half (55 percent) of PMPs said green products typically were used for preventive treatments. Nearly half (47 percent) said they were the primary means of controlling pests, up from 37 percent in 2019.

Green products, however, generally come with a learning curve, which means they simply can't be swapped in for conventional pesticides. "The botanicals don't quite work the same way that a standard synthetic would for prevention," cautioned Matt Eickman, Abra Kadabra Environmental Services.

Botanical products typically act as repellents. They also break down faster in the environment, providing a shorter residual. "One of the attractive features of these products is that they

are not persistent in the environment, so that means frequent applications to get a satisfactory result," said Dean Trevisol, Nozzle Nolen.

They do kill on contact. Botanicals have "a really good knock-down initially, better than a lot of synthetics in most cases," said Eickman, who has used them successfully for cockroach cleanouts.

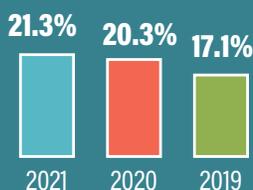
For some, the odor of botanical products remains a deterrent to indoor use. Manufacturers, however, "have been able to manage the aromatics of them a little bit better" over the years, pointed out Darren Van Steenwyk, director of learning and technical services at Clark Pest Control.

Industry attitudes about green products are evolving. Nearly half (47 percent) of PMPs said they'd choose a green product over a traditional pesticide if both were proven to be equally effective.

And 31 percent of PMPs thought manufacturers have done a good job developing green products to meet the specific needs of the professional pest management industry. 🌱

GREEN IS GROWING

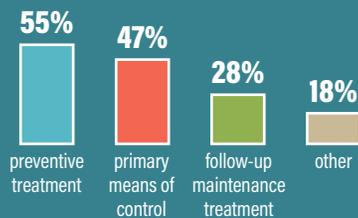
Average percentage of products used that are green:



Source: Readex Research, 2019-2021

SERVICES OFFERED

Typical uses of green products:



Source: Readex Research; Respondents: 220; multiple answers



47%
of PMPs would choose a green product over a traditional pesticide if both were proven to be equally effective.

31%
of PMPs agreed manufacturers have done a good job developing green products to meet the specific needs of the professional pest management industry.

Source: Readex Research; Respondents: 272



NATURAL FITS

3 IDEAL APPLICATION SITES FOR GREEN PEST CONTROL SERVICE

From shopping for plant-based foods to driving electric cars, today's consumers are more health and environmentally conscious than ever before. As their attitudes continue towards a greener future, PMPs can turn to natural pest control products with confidence. Formulated with naturally derived active ingredients, green pest control products get the job done in a variety of commercial and sensitive accounts, including homes, schools, and public buildings, without posing a threat to the environment.

Green pest control products provide greater flexibility to modern PMPs who are servicing different types of accounts daily. By understanding the features and benefits of green pest control, PMPs can be better positioned to take advantage of these solutions in a wide variety of accounts.



RESIDENTIAL

RECLAIM RESIDENTIAL

Many PMPs are experiencing an increase in residential service calls due to people spending more time at home with work-from-home and distance learning. For many of these calls, PMPs should consider treating homes with environmentally friendly pest control products that are sensitive on the environment, and to children and pets.

Before heading indoors for treatment, check to see if your client's property features a vegetable garden, or borders tall grass or wooded areas. To keep ticks away from these areas, apply Essentria® All Purpose Insect Concentrate as a perimeter spray treatment and on vegetation. Once this is taken care of, it's time to head indoors. Indoor pests like German and American cockroaches are difficult to treat in households. Essentria® Contact Spray provides natural roach control with broad application opportunities.

CLASSROOM CONTROL

An increasing emphasis is placed on the use of green pest control solutions at schools, especially at the request of parents. Green pest control products combat a wide variety of pests found in schools and are ideal for use in areas around children. Another perk? There's no downtime after the product is applied, so staff and students can quickly return to classrooms after treatment.

Wasps and hornets are often spotted at school accounts as they like to inhabit the underside of slides and the ceilings of other play equipment. Once nests are identified, use Essentria® Wasp & Hornet Spray for fast knockdown of these stinging insects. Essentria® Contact Spray is also an ideal choice for school accounts to control crawling insects, like ants.



SCHOOLS



PUBLIC SPACES



PROTECT PUBLIC SPACES

Because Essentria® products are 25(b) Exempt, products can be applied in a range of sensitive public locations to help eliminate insect populations and protect public health. Depending on the state, some public buildings and spaces may even require the use of green pest control products.

Green insecticides, like Essentria® IC-3 Insecticide Concentrate, can provide fast knockdown and lasting residual control of mosquitoes around public outdoor places. For public buildings that frequently have people coming and going, bed bug infestations can often take hold. Thoroughly inspect and treat common areas in these buildings for these pests with Essentria® Contact Spray.

Zoëcon Professional Products offers the industry's most complete selection of pest control solutions, including the Essentria® product line. These naturally derived products are FIFRA 25(b) exempt, offering an environmentally conscious option. Formulated with essential plant oils, this product lineup includes Essentria® IC-3 Insecticide Concentrate, Essentria® G Granular Insecticide, Essentria® All-Purpose Insect Concentrate and Essentria® Wasp & Homet Spray, all offering long residual control against a broad spectrum of pests. To learn more, visit Zoëcon.com.



Getting the WORD OUT

More pest control companies are publicizing their green services and products.

According to the 2021 PCT State of the Naturals Market survey, 45 percent of PMPs said their company marketing materials promoted green products and service offerings, up from 31 percent who said this in 2019.

“Eco-friendly” was the term most often used to describe green products and services, reported 60 percent of PMPs, followed by “environmentally friendly” (53 percent) and “green” (45 percent).

More information about green pest control is being published online, which is increasing consumer awareness of these services.

“People have more information, and knowledge is power. When they have that information, it allows them to make more educated decisions that keep them and their families safer,” said Matt Eickman, Abra Kadabra Environmental Service.

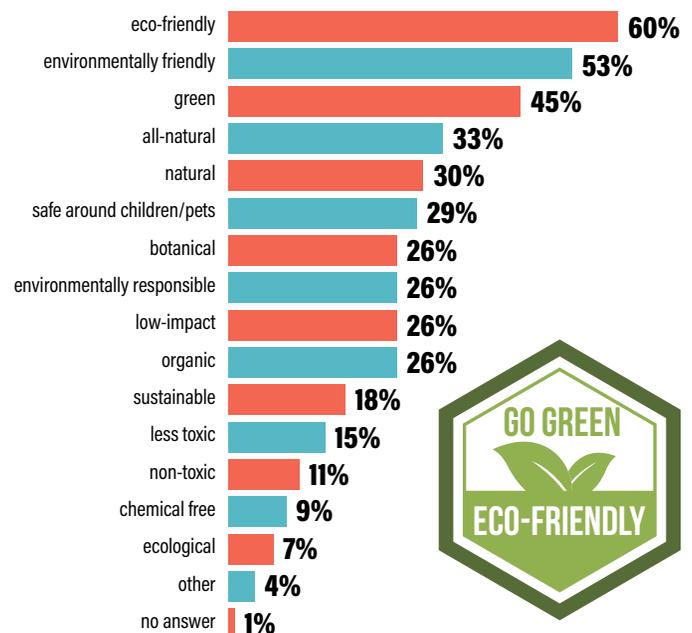
Only 21 percent of PMPs said their companies had developed a separate and distinct brand for their green pest control services.

Nozzle Nolen began offering its branded All-Natural Treatment program back in the mid-’80s when “green” was just a color, said Dean Trevisol. “Surveying our customers, some of them said they felt safer with greener services,” he said.

Arkadia – Eco Pest Control gets attention when neighbors smell the cedar or thyme oil it has applied outdoors to control ticks and mosquitoes. They soon start asking about it. “That’s a big part of our growth; that word of mouth,” said President Mark Constantino. 🌱

WORDS MATTER

Terminology used to promote green products/services:



Source: Readex Research; Respondents: 100; multiple answers

MARKETING MATTERS

Does your location promote green pest control products and services in its marketing materials?



45%

yes



45%

no



10%

location does not use marketing materials

Source: Readex Research; Respondents: 220

Beyond Service:

HOW COMPANIES ARE GOING GREEN

Pest management companies have embraced green practices in their operations, found the 2021 PCT State of the Naturals Market survey.

PMPs said that besides offering green pesticide solutions (53 percent) and making green product options available to technicians (36 percent), their companies bought routing software to reduce fuel consumption (22 percent), purchased smaller, more fuel-efficient vehicles (21 percent) and took steps to reduce energy consumption (14 percent), among other activities.

Nozzle Nolen minimized its footprint by going paperless for invoicing and service tickets and implementing route optimization to reduce fuel consumption. The company also encourages employees to volunteer in the community, from beach clean-ups to feeding the food insecure.

Bug-N-A-Rug Exterminators moved away from high-volume power spraying. This reduced potential run-off and fuel consumption, said General Manager Stuart Flynn. The Wilm-

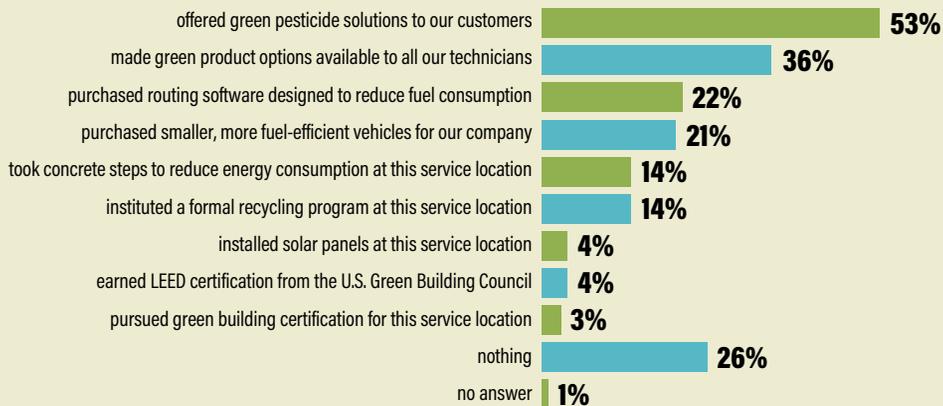
ington, N.C.-based company also may update its 60-truck fleet with electric vehicles. “That is something that we’ll be looking at in the future as we look to phase out older vehicles,” he said.

Parker Eco Pest Control is buying carbon offsets for its service vehicles. A third-party organization is calculating Parker’s carbon footprint, and then the company will purchase offsets — in this case, tree planting — on behalf of those vehicles, said Wesley Parker.

Arkadia – Eco Pest Control supports conservation efforts by donating \$1 for each customer to Save the Frogs! and also holds educational events for the nonprofit organization. The company’s superhero frog logo underscores its commitment to protecting these threatened animals.

According to this year’s PCT survey, fewer companies did nothing to go green — 26 percent — compared to the 2019 report, when nearly one third (32 percent) of pest management professionals said their locations did not undertake green initiatives. 🌱

GREEN AS A LIFESTYLE *What has your location done to go green?*



Source: Readex Research; Respondents: 272; multiple answers

The Green CUSTOMER

Millennials, or customers born between 1981 and 1996, were the most responsive to green sales and marketing messages, reported 44 percent of PMPs who took part in the 2021 PCT State of the Naturals Market survey.

But Generation Z, born between 1997 and 2012, was gaining as a key demographic. In PCT's 2019 survey, 13 percent of PMPs said this cohort was most receptive to green pest control messaging; that number jumped to 24 percent in 2021.

Regardless of age, customers who want green pest control shared specific traits, said PMPs.

Mark Constantino of Arkadia – Eco Pest Control said his customers are health-conscious individuals who watch what they eat, exercise regularly, and buy organic foods and cleaning products. Generally, they're married with children and pets, and have a bachelor's degree or higher education.

"It's a lifestyle. If you're pro-environment and you're pro-health, then you're going to look out for services that follow that philosophy," he explained.

Blair Smith, Clark Pest Control, has found green-leaning customers are highly engaged in the pest control process. They're "interested in what we're doing; they're interested in what we're using, why we're using it and where we're using it," she said. In addition, they typically have a higher tolerance for pests being present, she said.

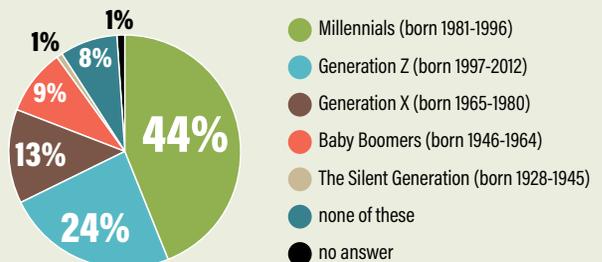
A gap between the green mindset of consumers and their wallets, however, is still apparent at times.

During pandemic stay-at-home orders, for instance, customers who needed indoor treatment wanted technicians to get in and out quickly and to solve the problem in a single treatment. "They were much more concerned about the efficacy than they were the green nature of it," said Darren Van Steenwyck, Clark Pest Control.

And other service attributes were still more important than being green, reported PMPs in the survey. These included being trustworthy and reliable (94 percent), providing high-quality products and services (88 percent), offering a good value (88 percent), and being local (84 percent), among others. Being green came in last at 28 percent. 🌱

WHO'S THE MARKET?

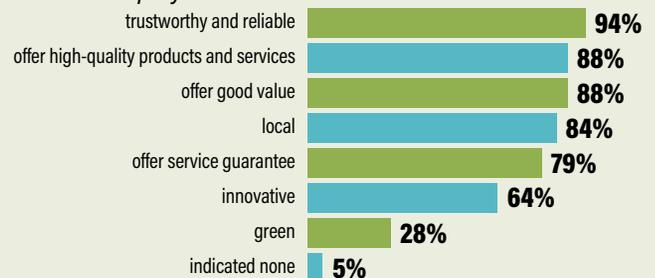
Demographic group most responsive to green marketing:



Source: Readex Research; Respondents: 272

IMPORTANT QUALITIES

What PMPs think customers view as important when doing business with their company:



Source: Readex Research; Respondents: 272; multiple answers





Banking on a **GREENER** **FUTURE**

In follow-up interviews, PMPs were bullish on the future of green pest management. “We definitely know the demand is increasing,” said Darren Van Steenwyk, Clark Pest Control.

Factors like increasing regulations, more effective green products, better technology for monitoring and analyzing pest pressure, and changing consumer attitudes are driving adoption.

“I see massive growth within the next 10 years in the green pest management industry as more individuals adapt to a healthier lifestyle,” said Mark Constantino, Arkadia – Eco Pest Control. He believes the sector has a lot of room to grow as more people become aware of it.

The industry is responding. According to the 2021 PCT State of the Naturals Market survey, a quarter (25 percent) of PMPs said green products would become a more important part of their product mix in the coming year, up from 20 percent who felt this way in PCT’s 2019 survey.

Early on, it took a lot to convince people that green pest management was the real deal, recalled Constantino. “Eleven years ago, people would look at you like you were crazy,” he said of peer reactions at industry meetings. Back then, he also had to give customers extended guarantees to prove the service worked.

Today, it’s a different story. “The future looks bright for the green pest management sector of our industry, and I’m happy to see that. I welcome the competition, just because I think it’s great for Mother Nature,” he said. 🌱

ON THE RISE

PMPs who agreed green products were going to become a more important part of their product mix in the coming year:



Source: Readex Research, 2019-2021

MARKETS: SOME ARE GREENER THAN OTHERS

According to the 2021 PCT State of the Naturals Market survey, most PMPs (68 percent) said customers in their markets were modestly environmentally conscious.

This sentiment is more pronounced in certain parts of the country, including coastal areas and progressive urban cities.

“In the Seattle area and probably on the West Coast in general, people are very concerned about pesticides,” said Wesley Parker, Parker Eco Pest Control.

She said even the crowd-sourced review website Yelp asks consumers seeking pest control in Seattle if they require eco-friendly, pet- or kid-safe applications before funneling these leads to advertisers.

CONSUMER PERSPECTIVE

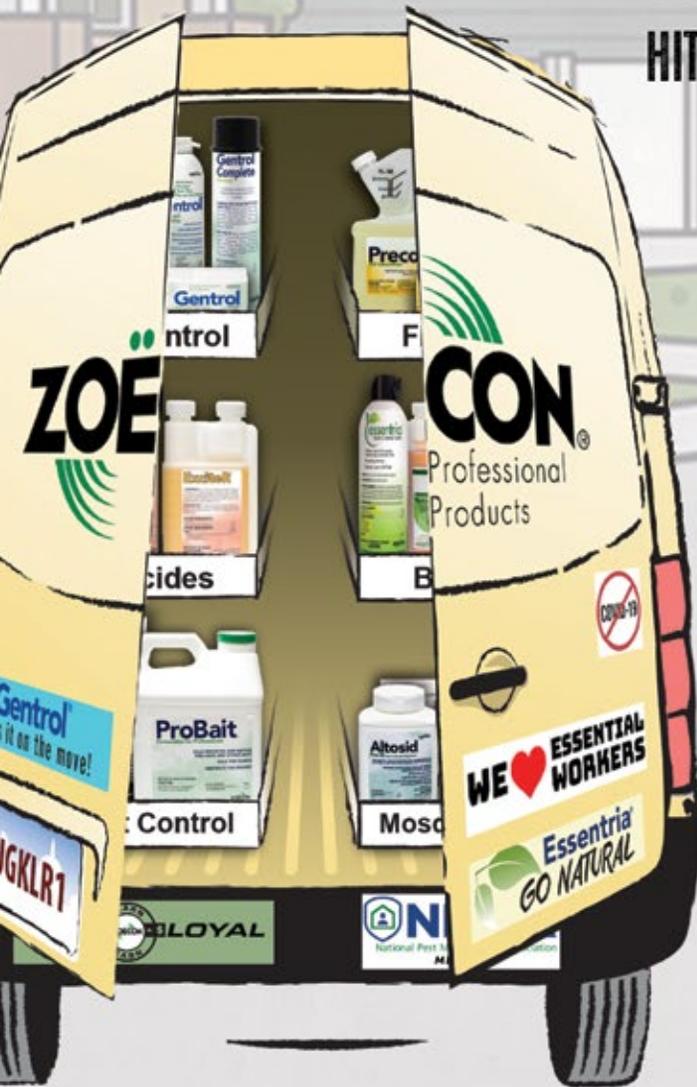
Overall, customers are...



Source: Readex Research; Respondents: 272

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- Contact your local Zoëcon sales rep
- Learn product details
- Access free literature and training posters



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