

State of the
**COCKROACH
CONTROL**
Market Report
— 2022 —

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Greetings from **SYNGENTA**

Cockroaches are some of the toughest public health pests. According to PCT magazine's 2022 State of the Cockroach Market report findings, 65% of surveyed pest management professionals (PMPs) shared that their customers find cockroaches to be a public health concern. It's no surprise, then, that these customers turn to you for effective, long-term solutions that can offer them peace of mind. We're continuously inspired by your dedication to the well-being of your customers and communities, and it is an honor to support your efforts.

Syngenta is proud to sponsor the State of the Cockroach Market report once again. 78% of surveyed PMPs considered cockroach control services a consistent or significantly increased portion of their businesses, confirming the undeniable need and value of effective solutions. This motivates us to develop innovative products and programs that can help you provide cockroach-free environments for your customers.

In the spirit of this ongoing innovation, Syngenta is excited to introduce Advion® MicroFlow insect bait, a new dry flowable bait offering for the cockroach control market. Featuring the same active ingredient and targeted MetaActive™ effect found in other trusted Advion brand products, this attractive bait can control entire cockroach populations through a highly effective secondary transfer effect. It's also milled to a fine particle size, which enables it to be applied with a power duster or bulb and bellows dusters to penetrate deep within cracks, crevices and voids to reach areas that are inaccessible to gel baits.

PMPs can use Advion MicroFlow to complement the SecureChoice™ Cockroach Assurance Program, which combines an integrated pest management approach with proven products to help PMPs deliver thorough control. The program assures at least a 90% reduction in cockroach populations within the first four customer visits over a 60-day period. If adequate reduction is not achieved, Syngenta will provide the appropriate quantity of products to cover the retreatment.

Cockroach control can be a challenge, but with the right products and protocols, we know you can overcome any cockroach problem. We're committed to helping you navigate these challenges so your customers can live a life uninterrupted by cockroaches. ■

Dr. Eric Paysen
Technical Services Manager
Syngenta Professional Pest Management

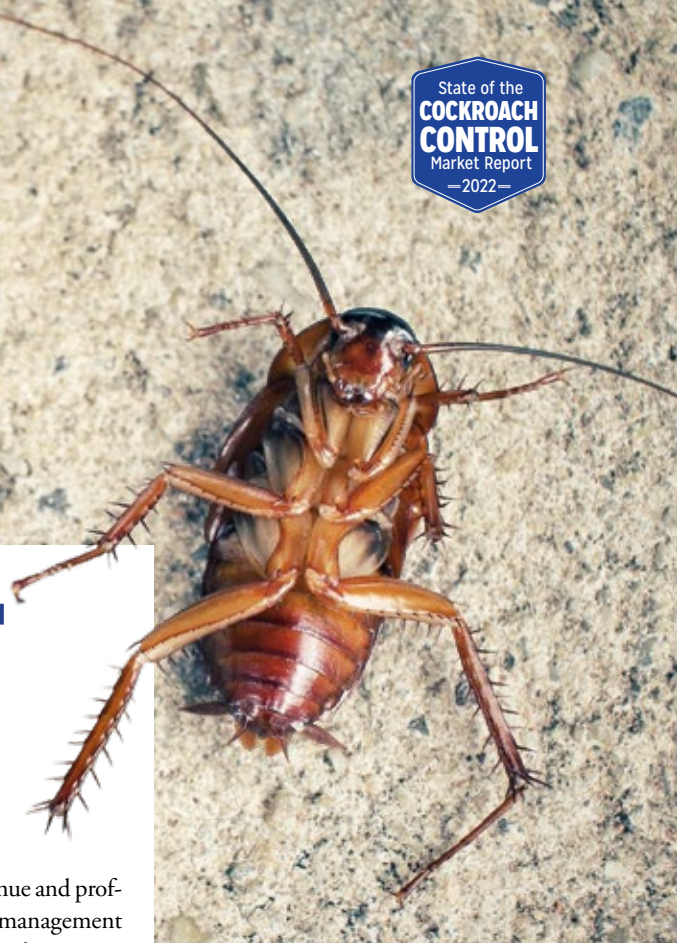
For more information, visit SyngentaPMP.com/AdvionMicroFlow

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@SyngentaPest #AdvionMicroFlow



Roach **REPORT**

From treatment protocols to clean-outs and curbing callbacks, PMPs tell us how they're managing this public health pest.

Multifamily housing, rental properties like duplexes and any housing situation where tenants are moving in and out and sharing connected spaces are some of the most inviting opportunities for cockroaches to take up residence.

In these circumstances, infestations can be persistent.

“When people move frequently, cockroaches can get carried from one place to the next,” says David Pipes, president, Esco Exterminating Services, Pine Bluff, Ark. His company services a lot of apartment complexes that are in “constant need,” such as requesting clean-out services after a tenant moves out.

Of the pest management professionals (PMPs) who participated in PCT’s 2022 State of the Cockroach Market Survey, 79 percent said multifamily housing and apartments are types of accounts that are in need of such service. That said, 96 percent of PMPs service single-family homes, and other popular accounts include schools, day cares, hotels and restaurants, food warehouses and distribution centers and government facilities.

The research identifies how PMPs are treating cockroaches, how often services are delivered and what opportunities this

pest presents in terms of revenue and profitability. About half of pest management professionals (47 percent) say they expect an increase in their firm’s cockroach control revenue next year, and the other half (49 percent) say they are expecting this business segment to remain flat.

“I’d say it is steady and can go in waves — we’ll be real busy and then it backs off, and it seems like in summertime people forget about their roach problems for some reason,” says Chey Ramsey, president, Total Pest Services, Fairland, Okla.

A Real Treat

A multi-pronged approach to treating cockroaches is how most PMPs approach the service. Eighty-two percent of PMPs

use both sprayable and gel baits in a program, 6 percent use only gel baits and 5 percent use only sprays.

“What works is a really integrated treatment of using baits, sprays and dusts together — knock-down products with an IGR can be very helpful, along with baits that contain IGRs,” says Benjamin Gillenwaters, board certified entomologist, Hulett Environmental Services in South Florida.

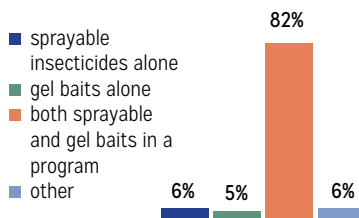
The company mostly uses gel baits but does rotate in other formulations and is careful to change out bait types quarterly. “By using multiple products with multiple modes of action, we honestly do not see resistance too much,” Gillenwaters says.

David Bjorgaard, owner of Discourt Pest Control in the Kansas City area, says his approach to cockroach treatment, or managing any pest, for that matter, is, “You can’t work your way through it; you have to think your way through it.”

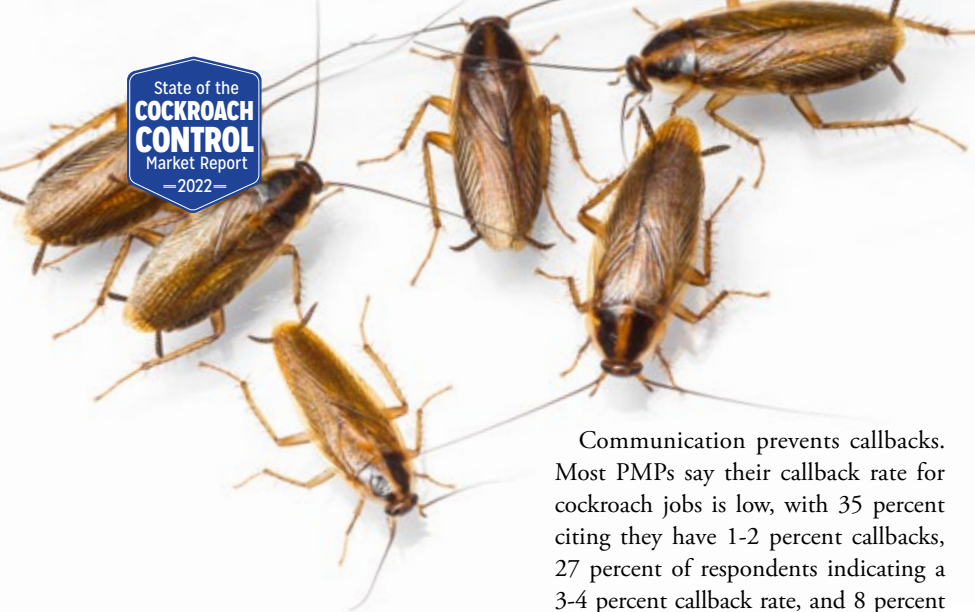
That requires problem-solving. “I called up my supplier and begged for help because we were having problems with cockroaches being finicky with baits and having problems with dust,”

TYPICAL TREATMENT METHODOLOGY

What is your location's typical cockroach control protocol?



Source: Readex Research; Number of Respondents: 191



Bjorgaard says. The reason was because the multifamily housing accounts he services had used DIY products and pyrethroid-based treatments prior to hiring his company. “That built up quite a bit of resistance.”

In fact, that’s one of the first questions Bjorgaard asks customers. “I find out if they’ve been spraying themselves, and if they say yes, that tells me they’ve got the resistant ones.”

Talk to Me

Any pest control protocol is only as effective as a customer’s willingness to comply. And communication ties in directly to profitability.

“If you can educate your customers and they recognize their role, it’s a very profitable endeavor,” Pipes says. “But if you do not communicate properly, then it can get to your pocketbook, because their expectations are what create that profitability.”

David Aguirre provides a PDF with instructions and information about German cockroaches so customers understand the pest they are dealing with and the conditions that can create tough infestations. “During the inspection, we go over what the customer’s responsibilities are,” says the pest control service manager of Thrasher Termite & Pest Control of So Cal in San Diego. “We focus a lot on communication, and I have trained my employees to be tactful but very direct. We let them know how to clean and point out spots like moisture in the sink, food debris or grease on the walls.”

Communication prevents callbacks. Most PMPs say their callback rate for cockroach jobs is low, with 35 percent citing they have 1-2 percent callbacks, 27 percent of respondents indicating a 3-4 percent callback rate, and 8 percent saying they have more than 10 percent of callbacks.

“I try not to oversell and put out clear expectations,” Ramsey says. “I’ll tell them what I’m going to do — what the first treatment will look like, and that they are going to see a reduction in population, but don’t be alarmed if there is still some activity. I emphasize that keeping up with cleanliness is key.”

Ramsey assures customers he will be back for a follow-up — there’s no need to report a few roaches scurrying around. “They’ll see cockroaches for the first couple of days after a treatment, and then I explain that they will see little ones and that means the program is working,” Ramsey continues.

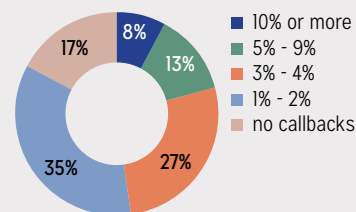
This explanation keeps callbacks at a minimum.

And if Ramsey walks into an account for an initial cockroach service and sees it’s a losing situation, he’ll walk away. “I’ve had a couple of accounts where I walked in, and it was an issue where the only way to get them out would be a fire, and I’ve walked right back out,” he says. “That’s not something I want to put my name on.”

Overall, when customers play a role, treatment works. And when technicians set realistic expectations, the service is profitable. As Aguirre says, “We explain that cockroaches are not going to go away the next day — it’s a process that can take several weeks, and you will see them in between services. But we tell customers, ‘You’ll see less adults, more juveniles and we want them to be sluggish, which is a good sign.’” ■

COCKROACH CALLBACK RATE

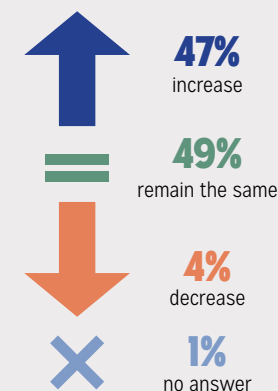
What is your location’s typical callback rate for cockroach jobs?



Source: Readex Research: Number of Respondents: 191

50/50 GROWTH VS. SAME

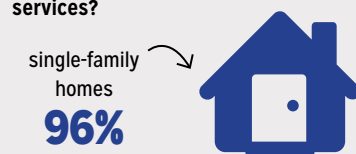
How do you expect the percentage of revenue generated by your location’s cockroach control services to change in the next year?



Source: Readex Research: Number of Respondents: 191

PLANES, TRAINS AND HOMES

For what types of accounts does your location provide cockroach control services?



apartments and multifamily housing	79%
restaurants and food service facilities	79%
health care facilities	49%
schools and day care centers	49%
hospitality accounts (hotels, motels, etc.)	44%
food warehouses and distribution centers	39%
government facilities	28%
modes of transportation (planes, trains, buses, etc.)	17%
other	7%

Source: Readex Research: Number of Respondents: 191; Respondents could select multiple answers

Inspection, **PLEASE!**

PMPs put all eyes on cockroaches – before initiating treatment.

Cockroaches rate 10 out of 10 on the persistence scale if you ask David Aguirre, owner, Thrasher Termite & Pest Control of So Cal in San Diego. But he doesn't mind. "I love treating cockroaches for the challenge," he says.

Thorough inspections with great attention to detail are the first step before spraying or baiting. It's all about targeting the harborage areas. "I can't tell you how many times we find them in areas that are usually overlooked, like inside a toaster or Keurig, under the kitchen table," Aguirre relates. "If cockroaches are an issue after the third or fourth treatment, that's when I get involved, because either the customer is bringing them in from an outside source, or a technician forgot to treat those areas."

Chey Ramsey says, "Every job is treated a little differently, and it depends on the severity." The owner of Fairland, Okla.-based Total Pest Services says the first visit is inspection-based, and then he leaves behind glueboards so he can identify hot spots. "With follow-ups, there is a lot of inspecting those glueboards and resetting those," he said. "For one, they catch a lot of bugs, and they let me know where our problems areas are — and it lets us know what's going on while we are not there."

Adam Carace treats cockroach inspections similar to bed bugs. "We check surrounding areas, we try to find out where the person goes on a regular basis — are they bringing insects in, especially when you get into multifamily situations," says the president of Pest-End Exterminators, Plaistow, N.H.

In commercial settings, taking apart some appliances is essential, Carace adds. "If you are at a coffee shop, the espresso machine has heat, moisture and everything a roach loves."

Computers are another culprit. "Not as much with laptops, but with desktops, they have heat, fans and sometimes people sit at their computers and eat, so there are food sources," Carace says. "A roach invasion can grow pretty quickly when they are content in a small area and you can't see it. Then, by the time you do, there are already 100 of them."

Brian Saling emphasizes attention to detail. The owner of Saling's Pest Control in the Las Vegas area says, "If you find cockroaches in the kitchen, maybe the back side of that is the bathroom, so you have to take care of both areas." He calls pipes "a travel lane" for cockroaches.

In another instance, Saling lifted an outdoor, igloo-style doghouse on a client's property and found a harborage for oriental cockroaches that he didn't expect. "There were hundreds under there, and it surprised me, but it made sense," he says. "It's dark. It's damp."

Now, it's protocol to lift up dog houses and potted plants. He also advises clients to elevate plants to circulate air rather than placing them directly on a patio.

Like general pest services, cockroach treatment calls for "detective work," Carace says. And it calls for commitment. "You have to find out why a problem is still there," he says. ■

► About the Survey

The PCT 2022 State of the Cockroach Control Market survey was sponsored by Syngenta and compiled by Readex Research, a privately held research firm in Stillwater, Minn.

A sample of 5,453 pest control company owners, operators, executives and technical directors was systematically selected from PCT's database and another pest control industry database. Data was collected from 201 respondents — a 4 percent response rate — via online survey from March 31-April 11, 2022. The margin of error for percentages based on the 191 respondents whose location offers cockroach control services is plus or minus 7 percentage points at the 95 percent confidence level. Charts may not add up to 100 because of rounding.





Path of **LEAST RESISTANCE**

A bait-and-switch technique keeps treatment palatable.

An integrated cockroach treatment program includes changing baits on a regular basis to prevent resistance issues. And because no two accounts are exactly the same, PMPs can find one bait highly effective at one home — and it could be unpalatable in another.

Overall, resistance is a 50/50 issue, based on PCT data. In the 2022 study, 50 percent of respondents said cockroach resistance is not a concern in their market area, and 50 percent said it is. Still, most PMPs are taking precautions, with 74 percent implementing cockroach resistance strategies like alternating baits.

“We are finding resistance in our baiting program,” says David Pipes, president,

Esco Exterminating Services, Pine Bluff, Ark. “Some of the early baits (weren’t) as effective, and there are over-the-counter products that people will throw at a problem before they call a professional. So sometimes, we go in and if we see evidence that someone has used that bait, typically ours will not be as effective.”

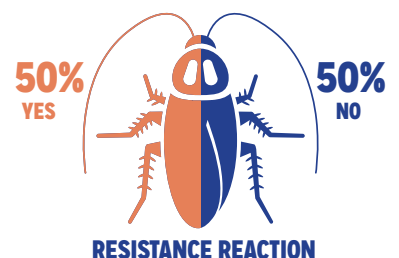
Actually, Pipes calls it “more of an avoidance factor than a resistance factor,” particularly with pyrethroid-based baits.

The cockroaches basically know what they’re going to get into and stay away. “So, in those instances, we go in with different chemistries and use IGRs and adulticides to get the population down to a level where it can be maintained and

eliminated over time,” Pipes says.

Another issue is when a customer has hired another, or several, pest control firms to manage a cockroach issue. “You can come in behind one of them and have no idea what they were using, so your initial visit is seeing what will stick,” Pipes says.

He’ll bring several baits and test them. “I can usually walk into an infestation environment and offer up a bait, and you’ll know within a minute if the cockroaches will be receptive, because they will come immediately — especially if there’s a large population,” Pipes says. “You can make a small bait placement near some active cockroaches, and then I can know which



Do you think cockroach resistance is a concern in your market area?

Source: Readex Research. Number of Respondents: 191



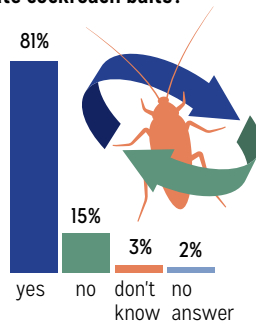
IMPLEMENTING RESISTANCE STRATEGIES?



Source: Readex Research; Number of Respondents: 191

ROTATE, ROTATE, ROTATE

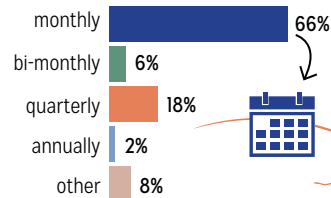
Is it your location's practice to rotate cockroach baits?



Source: Readex Research; Number of Respondents: 191

MONTHLY TREATMENT SCHEDULE MOST PREFERRED

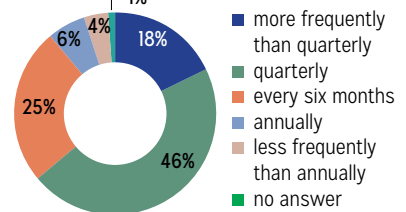
Which service cycle represents the majority of your location's cockroach control services?



Source: Readex Research; Number of Respondents: 191

QUARTERLY FREQUENCY RULES

How frequently are baits rotated?



Source: Readex Research; Number of Respondents: 154 (those who rotate baits)

one will work and go ahead with a bait application.”

Ben Gillenwaters says Hulett Environmental Services mostly uses gel cockroach baits, but also mixes in dry flowables with a mind to rotate baits quarterly. “Honestly, we do not really see resistance too often,” says the company’s board-certified entomologist. “By using multiple products with multiple modes of action, that is not occurring for us.”

According to the PCT study, 81 percent rotate cockroach baits, and most (46 percent) do so on a quarterly basis, with 18 percent switching bait types more frequently and 25 percent reporting they alternate baits every six months. Just 4 percent say bait rotation occurs annually.

“I see companies that get complacent using the same bait over and over again, not switching them up, and we really do change it up based on the situation,” says Adam Carace, president, Pest-End Exterminators, Plaistow, N.H. He goes beyond alternating baits and might go between a spray and bait. “If there is a place we sprayed several times, we’ll try a gel bait or vice-versa,” he says. ■

Clean-Up: Whose Job Is It Anyway?

According to PCT’s survey, 39 percent of respondents do not require homeowners or tenants to prepare or clean up the site before they arrive for treatment. And 13 percent are in the process of changing their German cockroach control protocol to an assessment-based, no-prep approach.

Do you ask customers calling for service to clean up first?

Brian Saling does if he is alerted by a property manager that a place is crawling with insects. “I have definitely done that,” he says. “I kill them; I don’t clean up.”

This also applies to callbacks reporting a roach or two. “I’ve had to drive 30 miles back to a house and the client says, ‘There is a dead bug,’ so there needs to be an understanding. I’m not your maid,” says Saling.

Vacuuming is one way Chey Ramsey clears the room to make way for cockroach treatment. “It depends on the severity,” says the owner of Total Pest Services in Fairland, Okla. But he comes prepared, just in case.

Overall, vacuuming is the primary control measure for 1 percent of respondents to the survey. However, sanitation is the No. 1 way customers can prevent a cockroach problem from recurring. Saling emphasizes, “You have to educate your customers.”



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