

SPONSORED CONTENT

2024 STATE OF THE COCKROACH CONTROL MARKET REPORT



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INSIDE

- » **Steady Revenue**
- » **When Treatment Protocols Vary**
- » **Managing Customer Concerns**
- » **Product Strategy Tips**
- » **Exclusive Research!**

GREETINGS FROM SYNGENTA!

Pest management professionals (PMPs) know they must stay on top of their game to provide living environments that are free from the public health threat of cockroaches. As these elusive pests continue to evolve and thrive in urban environments, PMPs need new or more effective treatments to meet customer expectations. According to this new State of the Cockroach Control Market report, 73% of surveyed PMPs feel research and development (R&D) into product formulation is extremely important. These PMPs want access to innovative solutions from a manufacturer like Syngenta to help tackle these challenges.



We're once again proud to sponsor the State of the Cockroach Control Market report, which annually unveils cockroach insights within our industry. We hope the findings will help you sharpen your cockroach knowledge and maximize your control services.

Syngenta offers powerful cockroach solutions that are designed to ensure effective, long-lasting results for your customers. This spring, Syngenta introduced its newest addition to the Advion® insecticide family with Advion Trio cockroach gel bait, which is formulated to stop cockroaches at every life stage. It combines the power of three active ingredients with three distinct modes of action, including an insect growth regulator and chitin synthesis inhibitor. This makes it the ultimate cleanout bait, offering complete control of cockroach nymphs and adults with built-in resistance management.

Advion Trio can be used as part of our SecureChoice™ Cockroach Assurance Program, which guarantees at least a 90% reduction in infestations within the first four customer visits over a 60-day period. For proactive resistance management, the program recommends rotating the following sets of products every 90 days:

- Advion WDG insecticide + Optigard® Cockroach gel bait
- Optigard Flex liquid insecticide + Advion Trio or Advion Evolution cockroach gel bait

If these rotations don't adequately reduce cockroach populations, Syngenta will supply the appropriate quantity of products to cover the retreatment.

Cockroaches will continue to be a challenge, but our team is here to help. We're committed to investing in R&D so we can deliver innovative solutions — including a new active ingredient with a new mode of action for cockroach control that's coming soon! Stay tuned to learn more about this game-changing technology so you can continue providing your customers with a life uninterrupted by cockroaches. 🦋

Dr. Tim Husen

Dr. Tim Husen, BCE, PHE
Technical Services Manager
Syngenta Professional Pest Management

For more information about trusted cockroach solutions, visit SyngentaPMP.com/Cockroach

FOR LIFE UNINTERRUPTED™



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EVERYTHING'S COMING UP Cockroaches

For every pest management professional (PMP) who has ever lost patience in the throes of a stubborn cockroach infestation, we offer this word of encouragement: Chasing! Cockroaches may be frustratingly crafty, elusive and generally difficult to control, but they also provide one of the steadiest sources of revenue a pest management company could ask for.

Nearly all of the PMPs PCT surveyed for this 2024 State of the Cockroach Control Market report (95 percent) said their company offers cockroach control services; just over two-thirds of those (68 percent) told PCT that cockroaches are a year-round pest in their markets.

“Pressure is high and consistent,” said Mark Peterson of Absolute Pest Control in Kansas City, Mo., whose team treats cockroaches primarily in multi-unit properties. “We service a lot of apartment complexes and senior-living facilities, and find that many of these customers simply aren’t aware that they could prevent infestations by following good sanitation practices. We educate them and offer to speak to groups of tenants, but until people start to really understand the role they can play in managing this pest, calls will continue to pour in.”

Demand is consistent in Florida, too, where both German and peridomestic cockroach species thrive. “German roaches are definitely a year-round pest here, with clients calling about infestations in their kitchens and bathrooms. With peridomestic roaches, some seasons are heavier than others, but we get calls year-round for them as well. For those accounts, we’re just trying to stop the pests from going into the home. Quarterly pest control is the best solution for keeping them at bay,” said Denise Trad-Wartan of Trad’s Pest Control in Jacksonville.

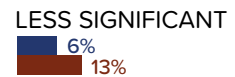
As revenues go, well over half (58 percent) of those who offer cockroach services said they expect those revenues to increase over the next year, with another 40 percent expecting consistent year-over-year sales. That’s a more optimistic outlook than a year ago, when 48 percent expected an increase and 47 percent expected sales to remain the same. It’s also notable that only 2 percent of PMPs said they expect to see a decline in 2024 cockroach revenue.

With such strong business potential, it pays to keep up with the latest strategies for managing cockroaches. The following pages feature some of those strategies, along with more findings from PCT’s annual cockroach research report. 🐜

SIGNIFICANT JUMP

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

2024 / 2023



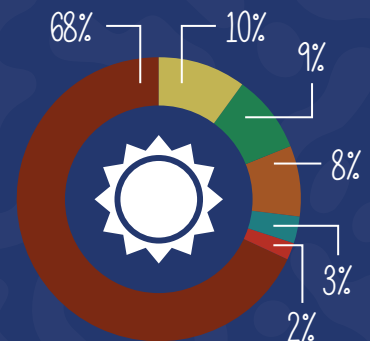
*not involved 5 years ago

Source: Readex Research; Number of respondents: 263 in 2024; 172 in 2023

BUSY SEASON

For your location, what season tends to be the busiest for providing ant control services?

- LATE SUMMER
- EARLY SUMMER
- FALL
- WINTER
- SPRING
- NO SEASONAL DIFFERENCE

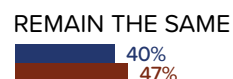


Source: Readex Research; Number of respondents: 263

FACE THE CHANGE

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

2024 / 2023



Source: Readex Research; Number of respondents: 263 in 2024; 172 in 2023

TREATMENT STRATEGIES

When a customer calls because they've seen a cockroach or two in their home, that's a fairly easy fix. But a full-blown infestation is quite another matter. Once these pests start proliferating, taking control can be a challenge. When PCT asked PMPs if, and how, their treatment protocol is different when the infestation is heavy, 90 percent said that they do change their approach in the case of large populations, in these ways:

- 61 percent said, "We use multiple product types or formulations."
- 26 percent said, "We use higher-labeled rates and multiple product types."
- 4 percent said, "We use we use higher-labeled rates."

Ryan Anderson of Anderson's Pest Control in Sioux Falls, S.D., shared specifics on how his team approaches large populations of German cockroaches. "We start with a flushing treatment, hitting every crack and crevice, as well as under countertops and appliances, around plumbing — anywhere that may be providing harborage. It's a thorough process that reduces the population by about 90 percent on day one. Then we place glueboards to monitor activity. We come back for the second round with dry baits and gel baits, and a spray pesticide with an IGR mixed in to control reproduction."

Anderson is among the 83 percent of PMPs who believe glueboards are very or somewhat important to cockroach management. His team places a lot of them — as many as 25 at a time in a typical kitchen. "We put one in every cupboard

and place them in all the other hotspots: toe kicks, under the stove and dishwasher, behind the microwave and coffee machine — you name it. We want to know where the cockroaches are, and glueboards can tell us that. When we see [immatures], for example, we know we're close to a harborage point. That knowledge can be very helpful, given how tough these pests are to get rid of."

Anderson's team averages three to five treatments for heavy infestations. They don't stop until every glue trap is clean.

PERIDOMESTIC PROTOCOLS. Of course, peridomestic cockroaches require a different treatment approach than German cockroaches, since they live outdoors. The goal with American, oriental, smoky brown, Australian, wood and other peridomestic cockroaches is to stop them from getting into homes and businesses.

Denise Trad-Wartan of Trad's Pest Control in Jacksonville, Fla., explained how her team approaches peridomestic pests. "When we inspect, we look for conducive conditions — high mulch piles, leaf litter, full gutters and utility penetration (if a water line isn't sealed up, for example, the cockroaches will follow that line to gain entry into the house). They love nesting in the palm trees here as well, so we look to see how close the fronds are to the home. We have to get buy-in on the part of the homeowner to help with these issues. If we go to a house and there are knee-high piles of oak leaves, we're not just going to keep spraying because it's not going to help. The customer needs to do their part."

Trad-Wartan added that the Trad's team



POPULATIONS PROCESS

Do you change your treatment protocols when dealing with large cockroach populations?

90% YES

61% YES, WE USE MULTIPLE PRODUCT TYPES OR FORMULATIONS

26% YES, WE USE HIGHER-LABELED RATES AND MULTIPLE PRODUCT TYPES

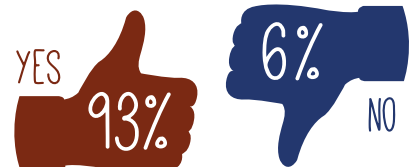
4% YES, WE USE HIGHER-LABELED RATES

9% NO, WE DO NOT CHANGE PROTOCOL BY INFESTATION LEVEL

Source: Readex Research; Number of respondents: 263

SPIN CYCLE

Is it your location's practice to rotate products with different modes of action to help prevent cockroach resistance?



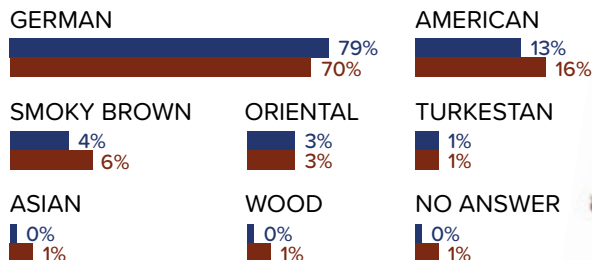
Source: Readex Research; Number of respondents: 263



SERVICE CALLS

Which one cockroach species represents the largest percentage of your location's cockroach control service calls?

2024 / 2023



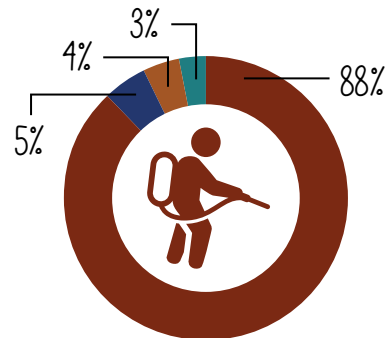
Source: Readex Research; Number of respondents: 263 in 2024; 172 in 2023



TYPICAL TASKS

What is your location's typical cockroach control protocol?

- BOTH SPRAYABLE AND GEL BAITS
- GEL BAITS ALONE
- SPRAYABLE INSECTICIDES ALONE
- OTHER

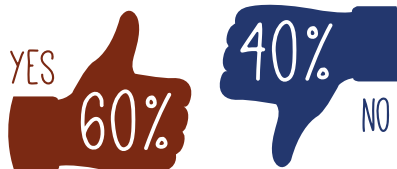


Source: Readex Research; Number of respondents: 263

COCKROACH RESISTANCE

Is cockroach resistance a concern in your market area?

Source: Readex Research; Number of respondents: 263

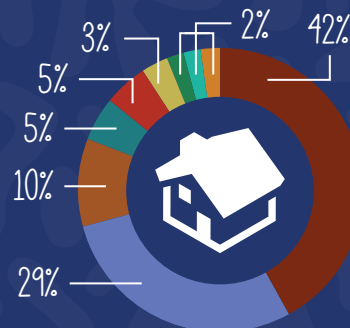


MEASURED UP

What is your location's primary control measure for managing cockroaches in homes and/or businesses?

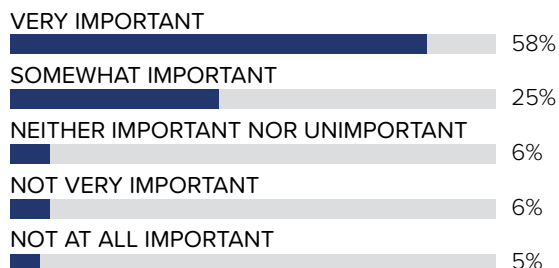
- GEL BAITS
- RESIDUAL PESTICIDE APPLICATIONS
- IGRs
- SANITATION
- EXTERIOR PERIMETER TREATMENTS
- VACUUMING
- GRANULAR BAITS
- GLUE TRAPS/TRAPPING
- OTHER

Source: Readex Research; Number of respondents: 263



STICKY SITUATION

How important is the use of glue traps in your cockroach management program?



Source: Readex Research; Number of respondents: 263

uses a combination of liquid and granular pesticides for perimeter treatments to manage peridomestic populations.

PRODUCT STRATEGIES. When asked, "What is your location's typical cockroach control protocol?" the majority of pest management professionals (88 percent) reported that they use a combination of sprayable pesticides and gel baits. Just 5 percent responded gel baits alone and 4 percent answered sprayable insecticides alone.

Overall, 88 percent of pest management firms use some type of pesticide application(s) and 44 percent use cockroach baits. Nearly all (93 percent) use bait rotation as a strategy to prevent or minimize resistance. Sixty percent of PMPs say cockroach resistance a concern in their market area. 🦋



BRINGING CUSTOMERS INTO THE FOLD

One of the primary reasons it can be so difficult to manage cockroaches is that customer collaboration is essential ... but not always forthcoming. You can ask people to wash their dishes, take out their trash and wipe up their greasy messes, but whether they actually comply with your request is a 50/50 proposition.

Part of the issue, says Dennis Kuchta, owner of Wise House Environmental Services, at least in the case of multi-unit properties, is that it's typically not the people causing the problem who call about it; instead, it's their neighbors.

"I just left a multi-level structure in

Boca Raton with a lot of German cockroaches that we've been battling for some time now. The challenge is narrowing it down to where the problem units are," Kuchta explained. "The people who won't tell you they have German roaches tend to be those whose apartments have conducive conditions. Whether they're hoarders or just don't want to be bothered with cleaning up their place, they don't want you to come in, so they keep quiet. The infestation grows and spreads to neighboring units, as roaches spill into the hallway, elevator, and cracks and crevices. We're in the process now of identifying the

source so we can help the other residents, as well as those in the problem unit or units, gain control."

Mark Peterson of Absolute Pest Control offered additional insight. "Unfortunately, a lot of people who grew up in homes with cockroaches think it's the norm to have them running around. Once we meet these folks, it's up to us to make them aware that it's not normal and, in fact, can be a health hazard. We begin the education process with every customer immediately."

That process entails the Absolute service technician sizing up the situation at the initial inspection and explaining to the customer that they will return and treat once the conducive conditions have been addressed. "We typically get good cooperation at that initial stage and find a 180-degree difference when we go back. At that point, we're able to start fresh and provide an effective treatment. A high percentage of customers follow through with that knowledge, too. We don't get callbacks from those who do their part."

ABOUT THE SURVEY

The PCT 2024 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 4,381 pest control company owners, operators, executives, general managers and technical directors was systematically selected from the PCT database. Data was collected from 276 respondents — a 6 percent response rate — via online survey from Jan. 4-16. 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.



HITCHIN' A RIDE

Cockroaches are well-known for being some of the world's best hitchhikers, so it should come as no surprise when someone calls because the opportunistic travelers have made their way into the family car. It's easy for them: They crawl into a paper bag at the grocery store or climb onto a pizza box at a restaurant that has an infestation. Once inside the vehicle, they're free to roam the cabin.

In Boynton Beach, Fla., Wise House Environmental Services began getting so many calls about vehicle infestations that they developed a special protocol for treating cars, trucks and SUVs.

"As with any of our accounts, we treat infested vehicles in the safest, most effective way possible," explained owner Dennis Kuchta. "We start with a thorough inspection and positive ID of the species, and then we vacuum and use baits in the cracks and crevices where we can safely do that. Many times, we find that kids' car seats have food underneath, so we take those seats out, vacuum them, and then bait cracks and crevices where the kids can't touch them. In fact, one of the guiding rules we've established for our team when they do any vehicle or interior treatment is to keep everything hidden and inaccessible to children and pets.

"We also let our customers know that they should have their vehicle cleaned before we do any crack and crevice treatment. Nine times out of 10, they do that, and so, by the time we get there, we're able to do our job and not have to worry about detailing the vehicle."

Commercial vehicles often need cockroach management as well, Kuchta added. "In our experience, it happens primarily with cleaning companies and restaurants. Workers may inadvertently bring cockroaches from one of the homes they clean or from the restaurant where they work. But really, it can happen to anyone who has been exposed to cockroaches, whether they're aware they've been exposed or not."

EDUCATE AND ERADICATE. Darrell Seelinger shared that many of the customers who call Oakland Pest Control (Macomb Township, Mich.) for service don't know about the health risks of cockroaches either. They don't know that the cuticles, feces, saliva and eggs of cockroaches contain substances that can be highly allergenic to humans, with the potential to trigger asthma and other respiratory symptoms, nor that they carry bacteria that can cause salmonella, staphylococcus or streptococcus if deposited in food.


It's not surprising that these customers may not be as likely to participate in the pest control experience. Not understanding the risks, they may not see the value in expending effort to keep food off their counters, take out their trash and minimize clutter. So Seelinger fills them in.

"I'm as committed to educating as I am to eradicating," he explained. Seelinger, who has found real estate agents to be great referral sources for cockroach work, went on to say, "Customers need to understand not only the risks cockroach infestations pose but also the critical role they need to play in getting rid of them. I can use every product that's available, but if I don't get customer cooperation, the cockroaches will just keep coming back."

His education emphasizes sanitation, maintenance and due diligence in monitoring boxes that come into the house or apartment from grocery and big-box retail stores. "Sometimes just conveying this information during the initial phone call is enough," he said. "I ask the customer when and where they've been seeing cockroaches, along with a few other questions, and then recommend several measures they can take to try to eliminate them. Sometimes just making them aware of issues within their control is enough to help them resolve the pest problem. If it's not and they call back, I head over to their place ASAP"

CUSTOMER INTEREST IS ON THE RISE. In spite of the instances where people simply don't know about the health risks of cockroaches, the PCT State of the Cockroach Control Market survey revealed an upward tick in consumer awareness. Nearly four out of five PMPs (79 percent) said their customers consider cockroaches a public health pest. That's an increase of 5 percent over last year.

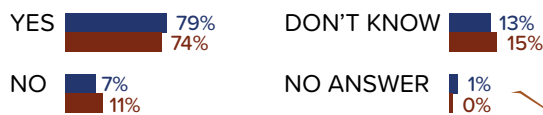
Many customers also inquire about the products being used to manage their cockroaches and other pests. The most commonly asked question by far (cited by 88 percent of PMPs) relates to the safety of products being used around pets and/or children. Other concerns include speed and longevity of control, and how the products work.

Perhaps as knowledge increases, customer collaboration will improve. 

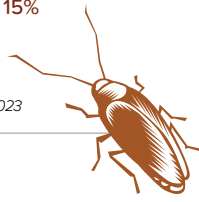
PUBLIC HEALTH PEST

Do your customers consider cockroaches a public health pest?

2024 / 2023

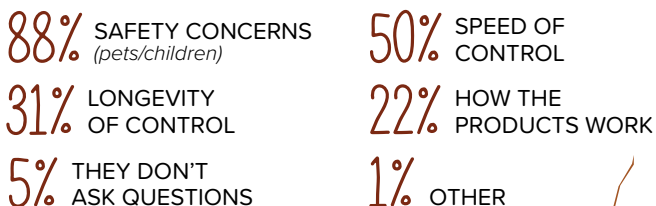


Source: Readex Research; Number of respondents: 263 in 2024; 172 in 2023



COMMON QUERIES

What are the most common questions you get from your customers about the products you're applying?



Source: Readex Research; Number of respondents: 276



TRUST THE #1 TOOLS IN THE TRADE

Like a carpenter's trusty hammer, Syngenta gel baits are what pest management professionals reach for to get the job done right. Formulated with highly attractive bait matrices, **Advion®** and **Optigard®** brand gel baits are the industry's leaders for superior control of ants and cockroaches.



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