



2024 STATE OF THE BED BUG CONTROL MARKET REPORT

INSIDE:

- › Why bed bugs are a key service
- › Pricing and monitoring strategies
- › Plan for resistance
- › Control options to consider
- › Exclusive research

13.7%

average percentage of revenue generated by bed bug control services at company locations in the past 12 months

Source: Readex Research; Number of respondents: 165



THE ESSENTIALS

Bed bug control remained an essential service for pest control companies in 2024.

“It’s extremely important,” said Joel Grassi, director of sales at BHB Pest Elimination, which serves residential and commercial customers in New York, New Jersey and Pennsylvania.

People who have bed bug issues needed professional help to get rid of the pests.

On average, these services generated 13.7 percent of revenue at pest control company locations over the past 12 months, found the 2024 PCT State of

the Bed Bug Control Market survey. The survey was sponsored by Envu and conducted by Readex Research, an independent research firm based in Stillwater, Minn.

For multi-family housing, effective bed bug control services were key.

“In Los Angeles, bed bugs are a reason for someone to sue someone else. We need to be able to do bed bug work for our customers and do it well,” said Greg Bausch, vice president of American City Pest & Termite, Gardena, Calif.

It’s also work you don’t want to give to a competitor, even if it’s a small

percentage of your revenue. “If we don’t do it, somebody else will,” Bausch pointed out.

BUGSolutions of Tennessee services about 780 apartment communities in the middle of the state. “Bed bug control is one of our niches. We’ve been able to figure it out and solve the issue before we’re treating a whole building for bed bugs,” said Loyd Owen, senior division manager.

In follow-up interviews, pest management professionals (PMPs) said bed bug control is not the predominant service it was years ago. “We still have bed bug jobs regularly” but “we’re less busy” with this work, explained Grassi.

Del Lawson, vice president, Modern Pest Control, which serves the greater Houston area, agreed. Bed bugs are “not in the first 10 lines of our revenue coming in, but it’s enough for us to focus on it, to train on it, to be prepared, to carry the products; all of that.”

According to the PCT survey, 38 percent of PMPs said bed bug control services became more significant to their business over the past five years. In comparison, 68 percent responded this way in 2017, the first year PCT conducted bed bug market research.

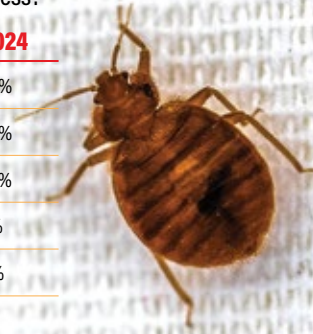
Grassi attributes the shift in significance to the industry becoming better at solving bed bug problems. “We had to do the research, really hone our craft, really come up with better products and methodologies.” The industry is better now at inspection, control methods and monitoring, he said.

According to the PCT survey, 86 percent of pest management company locations offered bed bug control services in 2024, up from 71 percent seven years ago.

MODERATE SIGNIFICANCE

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

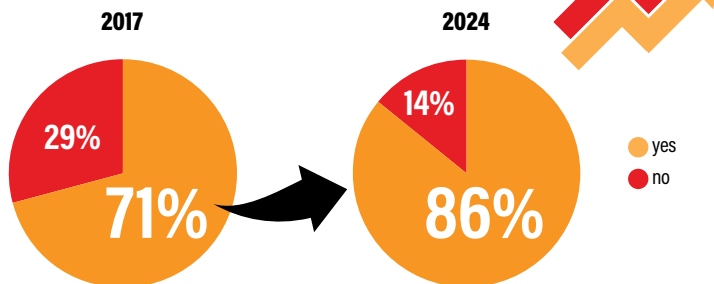
	2017	2024
more significant	68%	38%
no change	19%	34%
less significant	5%	22%
cannot compare; not involved five years ago	7%	7%
no answer	1%	0%



Source: Readex Research; Number of respondents: 165 in 2024; 361 in 2017

STEADY CLIMB

Does your company location offer bed bug control services?



Source: Readex Research; Number of respondents: 191 in 2024; 506 in 2017

TRENDING TOWARDS GROWTH

PMPs anticipate a good run for bed bug services in the year ahead.

According to the 2024 PCT State of the Bed Bug Control Market survey, 53 percent expected the percentage of revenue generated from these services to remain steady in the next 12 months.

Others had a more positive outlook: 45 percent projected this revenue to increase (though a reduction from the 64 percent who expected an increase in 2017). More than half (55 percent) anticipated more bed bug calls and jobs in the year ahead.

Modern Pest Control saw the frequency of bed bug calls increase after the COVID-19 pandemic. That's when it began offering bed bug services to hospitality clients in addition to medical clinics. Residential work also picked up.

"We've done more residential bed bug work this year than we have probably in the last three years," said Del Lawson. Though the number of these jobs is low, he expected the growth to continue.

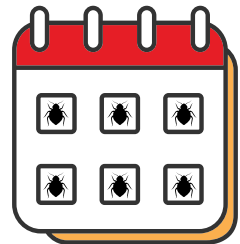
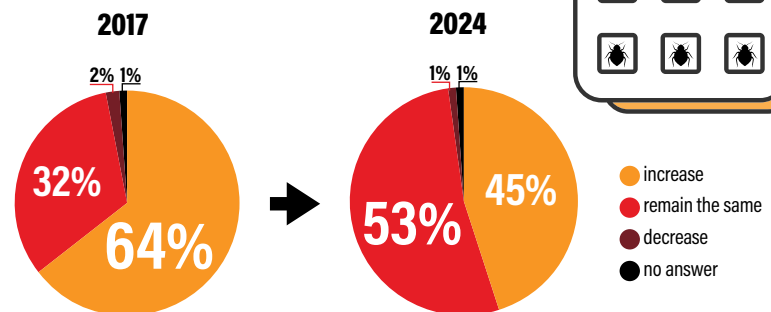
"We've done more residential bed bug work this year than we have probably in the last three years." — Del Lawson, Vice President of Modern Pest Control

Growing this business segment is not without challenges. In fact, 76 percent of PMPs indicated at least one issue was holding back growth of bed bug services.

Topping the list: fewer bed bug infestations, reported 25 percent of PMPs. One in five (20 percent) cited lower customer demand for bed bug services, and 21 percent said marketing the service was difficult.

REVENUE EXPECTED TO BE DOWN

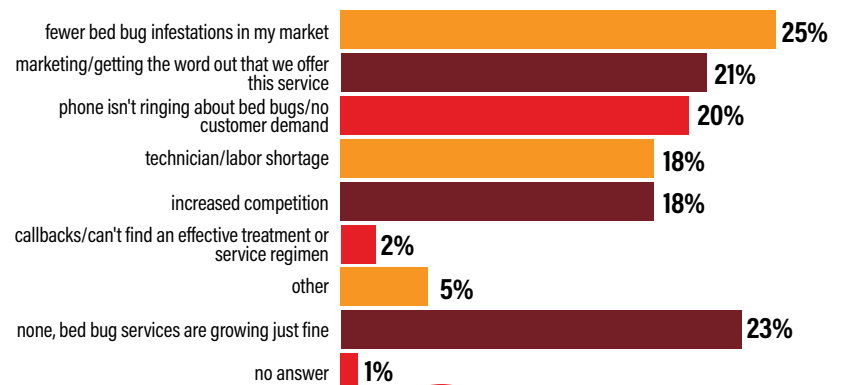
How do you expect the percentage of revenue generated by your location's bed bug control services to change in the next 12 months?



Source: Readex Research; Number of respondents: 165 in 2024; 361 in 2017

GROWTH BARRIERS

In your opinion, what challenges are holding back the growth of your location's bed bug services?

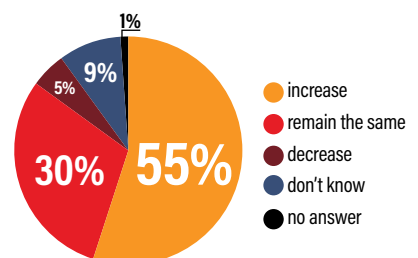


76% of PMPs indicated at least one challenge to growing bed bug services at their location

Source: Readex Research; Number of respondents: 165; Respondents could select more than one answer

MORE JOBS

Compared to the last 12 months, do you think your market area will see an overall increase or decrease in the number/frequency of bed bug calls and jobs in the next 12 months?



Source: Readex Research; Number of respondents: 165

Detect faster. Treat sooner. Control longer.

PMPs reported a **35% increase in revenue¹** for bed bug treatments in the past 12 months.

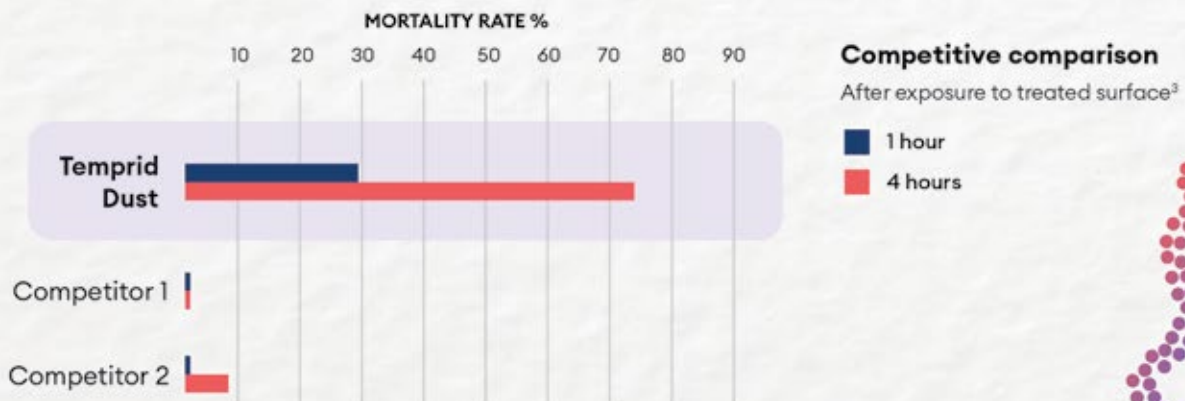
In the pest control industry, time is of the essence. Envu understands the importance of time, especially when it comes to bed bugs. It's why we've developed innovative products that help you make the most of your valuable time. With solutions designed to detect faster, treat sooner and control longer, you can reduce callbacks and keep your business moving forward.



**Bed bugs keeping your clients up?
Start putting them to rest in 10 minutes.²**

As pests adapt, the need for quick control has become even greater. **Temprid[®] Dust** **swiftly tackles bed bugs with two modes of action** in a formulation lighter than similar products. It's the perfect choice for managing even resistant strains of bed bugs with quick-acting, long-lasting power.

- ✔ Provides long-lasting control
- ✔ Complements the coverage of Temprid[®] FX insecticide
- ✔ Use on hard-to-reach places, baseboards, outlets, cracks and crevices





The #1 product for treating bed bug infestations⁴

Combining a powerful, co-milled, dual-active formula, **Temprid® FX insecticide provides long-lasting control of hard-to-manage pest.** With a flexible label that gives you confidence to take on the toughest jobs, it's earned an **81% satisfaction rating¹** with PMPs.

- ✓ Dual-action technology
- ✓ Can prevent infestations for up to six months
- ✓ Kills even pyrethroid-resistant bed bugs and eggs

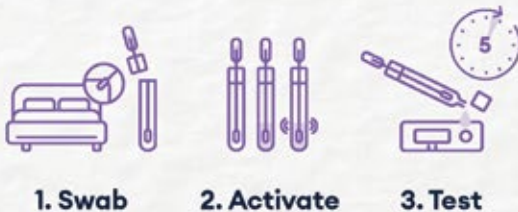
Comparing control options

Type	Effectiveness	Residual control	Fast-acting	Ease of use
Heat	+++	×	✓	Hard
Temprid FX	+++	Up to six months	✓	Easy



Detect with speed and accuracy

TruDetx™ Bed Bug Rapid Test is a revolutionary bed bug detection device that detects even low-level bed bug infestations with over 90% accuracy.⁵ It's the most accurate bed bug detector available.



- ✓ Results in under five minutes
- ✓ Discreet
- ✓ Cost-effective



Scan to explore our portfolio of bed bug solutions

¹Pest Control Technology 2024 State of the Bed Bug Control Market. ²Protocol OE18USAXKD. ³Protocol: OE21USAXK4, OE19USAX22, OE18USAXKD, OE18USAXK1, OE18USAXK7. ⁴Based on the percent of respondents who mention Temprid FX. Source: <https://hgmpestworld.org/default/assets/File/newsroom/magazine/2015/Nov-Dec-2015.pdf>. ⁵Ko, Alexander & Choe, Dong-Hwan. Development of a lateral flow test for bed bug detection. Scientific Reports 10:13376 (2020).

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SERVICE STRATEGIES

Single-family homes (45 percent) and multi-family housing (37 percent) were the biggest markets for bed bug revenue this past year, reported PMPs.

This was true for Romans Pest Management, where about 15 percent of revenue comes from bed bugs. “Commercial work is a small part but it’s mainly residential,” said Greg Agapie, a co-owner of the Lawrenceburg, Ind., company.

The severity of infestations he faces “is all over the place.” He recently had a job of the worst kind. “I don’t know how those people still had blood left in their bodies,” Agapie recalled.

Preventing extreme infestations by finding bed bugs early is the goal of technicians at BUGSolutions of Tennessee. Each quarter, they perform “visual checks” for bed bugs and other pests during “inspection walks” of apartment units, said Loyd Owen.

“Our routine inspections really help out. That’s where we find most of our bed bug issues,” he said.

Doing regular inspections also builds relationships. By getting to know your clients in that way, you begin to know the ins and outs of the community, said Raymond VanderLouw, a pest control sales specialist for Helena Agri-Enterprises. He previously was technical director of Prosite Pest Control in Ellensburg, Wash.

Owen of BUGSolutions holds bed bug workshops for tenants. He works with property managers to send out letters to tenants in multiple languages that explain how bed bugs spread and prevention tips.

“I think that education about bed bugs, people being more

aware of them now, has cut back on larger infestations,” he said.

Joel Grassi, BHB Pest Elimination, has seen fewer mega-infestations in recent years. He said education has made customers less freaked out by bed bugs than in the past.

“It’s not quite the level of ‘the sky is falling’ that it used to be if somebody realized they have bed bugs. They’re not lighting their bed on fire or doing something crazy,” said Grassi. This change in mindset has helped pest control companies respond to bed bug problems more efficiently, he added.

Cost can deter some customers. On average, companies charged \$967 for residential treatment. More than half (53 percent) of PMPs said their locations increased bed bug prices in the past three years. Some companies urge property managers to pay for preventive bed bug monitoring services, especially in multi-family buildings with a history of the pests.

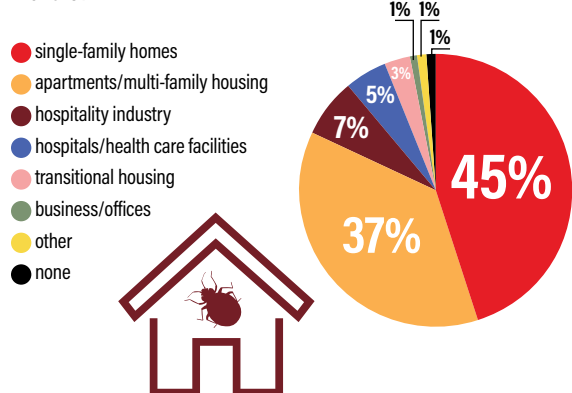
“We recommend it. Rarely do they want to do it because, *oh my God*, you might find bed bugs,” said Greg Bausch, American City Pest & Termite. Of course, that’s the point of monitoring — finding and eliminating the pests before bed bugs become a big, expensive problem — but property management companies don’t always see it that way. Some are enlightened, others want “to bury everything. It’s crazy,” said Bausch.

BHB Pest Elimination offers monitoring as an add-on service for residential and commercial accounts. “I tell people all the time, there’s no shame in having bed bug monitors in your home. You’ll be glad you did. It makes a lot of sense,” said Grassi.

The company installs, inspects and maintains monitors. It uses pitfall traps, smart monitors and sticky traps. “There are different tools for different situations,” said Grassi. 🍯

HOME RULE

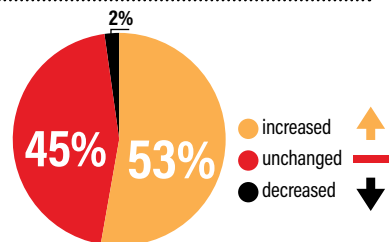
Which one of these bed bug markets represented the largest portion of your location’s bed bug revenue in the past 12 months?



Source: Readex Research; Number of respondents: 165

PRICE JUMP

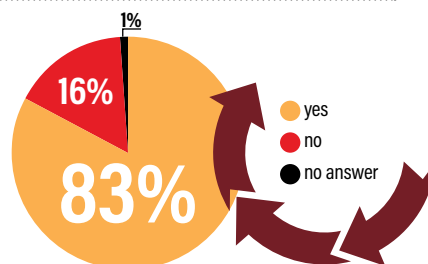
Has the pricing for bed bug services at your location increased, decreased or remained unchanged in the past three years?



Source: Readex Research; Number of respondents: 165

EMBRACING ROTATION

Is product rotation part of your location’s bed bug resistance treatment protocol?



Source: Readex Research; Number of respondents: 75



RISE OF THE RESISTANCE

Pesticide resistance in bed bugs is a problem. The industry is somewhat to blame for this, said Raymond VanderLouw.

“I have seen resistant populations of insects way more than I ever have previously. I’ve seen people treat with the same product over and over and over again and still not be able to take care of the bed bug issue. Like, what are you doing?” said VanderLouw, a former technical director who now works for Helena Agri-Enterprises.

According to the 2024 PCT State of the Bed Bug Control Market survey, 21 percent of PMPs said bed bug resistance was a problem they can manage. Most (42 percent) had not encountered resistance in their markets, while 33 percent found it on occasion.

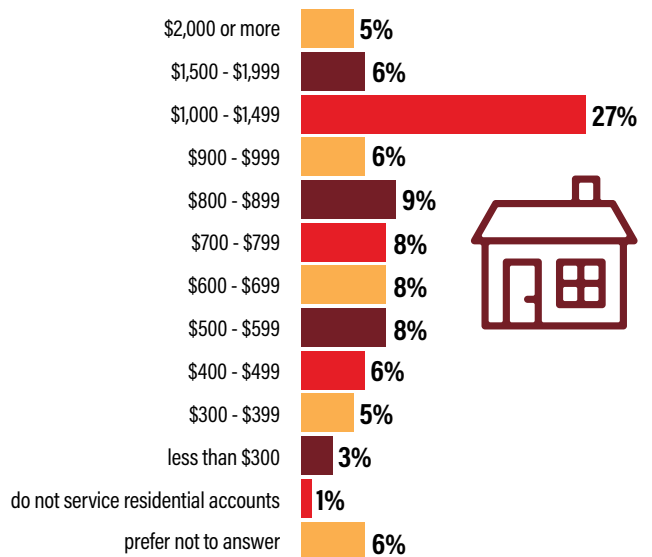
More than half (54 percent) of pest control company locations have not implemented a resistance treatment protocol. Among the 45 percent that have, 83 percent are rotating product use. This involves switching to products with different active ingredients and modes of action every three months or so.

VanderLouw said continuing education is essential to beating resistance. “You’ve got to always, *always* keep learning. Keep up with the experts. It’s important to keep up on your skills. The way I treated bed bugs 10 years ago is not the way I treat bed bugs now,” he said.

Greg Agapie, Romans Pest Management, urged PMPs to “research what chemicals you’re using.” Give new products a try. You might find a more effective solution. “I’m looking at everything. I’m constantly trying new materials,” he said. 🍌

COST OF TREATMENT

How much does your company location charge for a typical residential bed bug treatment?



\$967

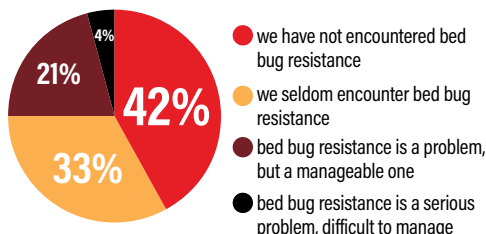
average price for residential bed bug treatment



Source: Readex Research; Number of respondents: 165

RESISTANCE IS REAL

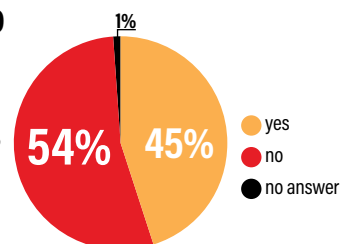
How would you characterize the level of bed bug resistance in your market area?



Source: Readex Research; Number of respondents: 165

WORK AROUND

Has your location implemented a bed bug resistance treatment protocol?



Source: Readex Research; Number of respondents: 165



OPTIONS ABOUND

Pest control company locations used an arsenal of tools to control bed bugs in 2024.

Topping the list: conventional insecticide treatments, reported 89 percent of PMPs. This was the primary treatment method for 62 percent of locations.

Twenty-eight percent of locations used heat to control bed bugs. It was the primary treatment approach for half (14 percent) of heat users. Biological or biopesticide treatments were used by 27 percent and were the go-to method for 12 percent.

Mattress encasements were used by 62 percent of pest control companies. “We require and install bed bug mattress encasements on every job. It’s priced into the job. It’s not an option,” said Del Lawson, Modern Pest Control.

If clients can afford only one encasement, put it on the box spring, advised Raymond VanderLouw, Helena Agri-Enterprises. “There are a thousand hiding spots in there. And these bugs are cryptic. They don’t like to be bumped or jostled,” he said.

Also popular: monitoring (47 percent), which can help technicians more precisely apply treatment, said VanderLouw, and vacuuming (48 percent).

“I think a vacuum is critical. If you can remove 90 to 95 percent of the bugs while you’re there the first time out, your chances with the remaining 5 percent are way greater,” said VanderLouw.

He suggested vacuuming while visually inspecting seams, cracks, crevices, curtains and carpet edges.

Conducting a thorough inspection is essential before performing treatment. In multi-family housing, PMPs inspected adjacent units.

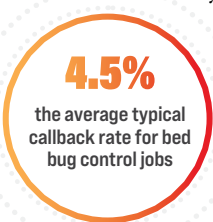
“If we can get into adjacent units, sometimes we find the real problem,” said Greg Bausch, American City Pest & Termite. In a heavy infestation, bed bugs can travel through cracks and crevices.

Modern Pest Control charges a fee for bed bug inspections. “It eliminates the tire kickers ... who want to get the work done but wants the absolute cheapest price,” said Lawson.

If the customer has the service performed by Modern, the cost of the inspection is deducted from the price.

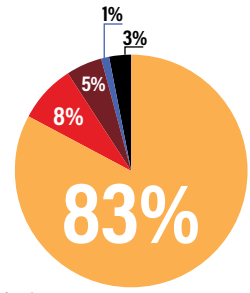
Before jumping into bed bug control, “educate yourself,” urged Bausch. “It’s not like walking around a house and putting down a barrier for crawling pests.”

Finding the right person to do bed bug work is important. “It takes somebody with a fair bit of empathy. Somebody who is diplomatic in their language and their approach. Somebody who can educate and comfort at the same time,” said VanderLouw.



LIQUID IS TOP

What is your location's preferred conventional pesticide formulation for treating bed bugs?



- liquid/spray
- aerosol
- dust/powder
- fumigant
- no preference

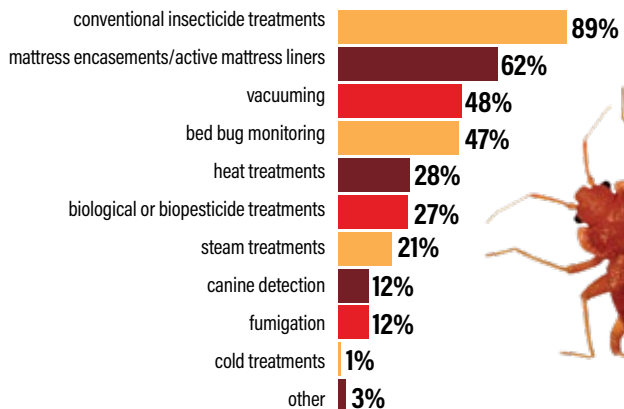
Source: Readex Research; Number of respondents: 102

About the Survey

Sponsored by Envu, the 2024 PCT State of the Bed Bug Control Market study was conducted by Readex Research, a privately held research firm based in Stillwater, Minn. A sample of 4,511 pest control company owners, executives, technical directors, general managers, and managers was systematically selected from the PCT circulation file. Data was collected from 191 respondents — a 4 percent response rate — via online survey from July 9–22, 2024, with 165 respondents stating their company location offered bed bug control services. The margin of error for 165 respondents is plus or minus 7.5 percent at the 95 percent confidence level. Charts may not add up to 100 percent due to rounding.

A FULL TOOLBOX

Which of these treatments or service regimens does your company location use to control bed bugs?



Source: Readex Research; Number of respondents: 165; Respondents could select more than one answer

