

2025 State of the **RODENT** *Control Market*



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Covered, Always

The past few years have underscored that the regulatory environment around rodenticides is evolving and shifting. No matter where you live, it's important that trained pest management professionals (PMPs) have access to a variety of active ingredients. Baits are vital tools for PMPs to effectively protect the public from rodent disease and damage.

This belief comes to life through Bell's extensive portfolio. We produce 28 unique rodenticide formulas, 6 different active ingredients, 22 rodent stations, plus numerous high-quality trapping options. Every day, we work to find solutions to the problems you face in the field.

In the U.S. and worldwide, we are committed to equipping PMPs with the tools for success, particularly as regulatory pressures continue to shift. No matter your need in the fight against rodents, Bell has you covered.



Steve Levy

CONSISTENCY YOU CAN COUNT ON

Creating products you can trust starts with the dedication of our experienced multidisciplinary research and development team.

These professionals hold specialized training and degrees in analytical chemistry, synthetic chemistry, chemical engineering, biology, and toxicology, which they use daily when creating and testing new formulas and advanced technologies. The team works hard to develop solutions that address evolving requirements and industry needs.

Outside of the lab, our dedicated field-testing team works to prove that our products are effective in any situation PMPs may encounter.

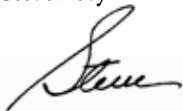
This collaboration leads to high-quality products that serve rodent control professionals around the world.

ALWAYS BY YOUR SIDE

Our success relies on listening to you to develop and manufacture those tools. The insights you share guide our development of new formulations, technologies, and solutions.

As we head into 2026, we are grateful for the partnerships we've built. From all of us at Bell, we thank you for your continued trust and support, and we wish you a rewarding and successful year ahead. ●

Steve Levy



President and CEO
Bell Laboratories

Rodent Revelations

Anyone who has ever come face-to-face with a severe rat infestation knows it takes ingenuity and perseverance to get the situation under control. Whether the infestation is in a warehouse, a food plant, a grain elevator or someone's home, the pressure is on to identify the right tools for the circumstances. Sometimes, according to Jay Swann, owner of Appalachian Pest Control in Barboursville, W.Va., those tools include a strong stomach and a snow shovel or two.

"A lot of the sewer systems in West Virginia are dilapidated, which makes them a playground for rodents. Commercial buildings, especially those in downtown and suburban areas, pay the price as rodent pressure is a constant concern," Swann said. He shared the story of a warehouse so badly infested that Norway rats and mice brazenly scurried over his service technicians' feet on their first visit. On their second visit, the team caught a sickening whiff of their success as they approached the building. Vast numbers of carcasses piled in the surrounding field needed to be shoveled away to clear the client's property.

A similar situation arose when Swann's team treated an elderly couple's garage apartment, which had become overrun with rats due to their unchecked activities of feeding and breeding what they apparently viewed as pets. "You couldn't put a count on these rats. Animal control got involved, and we needed to put out 18 pounds of rodenticide in one day," he said. When all was said and done, the pest management team needed to grab their shovels again.

Today, dramatic scenarios like these are playing out across geographic markets, as pest management companies that seldom received rodent calls five or 10 years ago are suddenly finding themselves deeply embedded in the rodent business. Consistently delivering effective solutions depends on their commitment to conducting thorough inspections, accurately identifying species and prescribing the right mix of mechanical and chemical treatments.

PCT asked PMPs about their approaches to rodent control through the 2025 State of the Rodent Control Market survey. The highlights presented in the following pages offer insight into what's happening nationwide. ●

RODENT PRESSURE REMAINS STRONG

Over the past year, have the number of rodent infestations in your location's market area increased, decreased or remained the same?

| | All PMPs | Northeast | Midwest | South | West |
|--------------|----------|-----------|---------|-------|------|
| Increased ↑ | 56% | 62% | 43% | 55% | 64% |
| Steady — | 38% | 31% | 49% | 38% | 33% |
| Decreased ↓ | 2% | 2% | 2% | 2% | 2% |
| Don't Know ○ | 4% | 6% | 6% | 4% | 2% |

Source: Readex Research; Number of respondents: 305



A GAME OF RAT AND MOUSE

What rodent species represented the largest percentage of your location's service calls in the past year?



| | All PMPs | Northeast | Midwest | South | West |
|------------|----------|-----------|---------|-------|------|
| MICE TOTAL | 54% | 90% | 92% | 42% | 20% |
| RATS TOTAL | 44% | 8% | 6% | 57% | 77% |

| | | | | | |
|-------------|-----|-----|-----|-----|-----|
| House mice | 47% | 79% | 75% | 40% | 8% |
| Roof rats | 26% | 0% | 0% | 34% | 54% |
| Norway rats | 16% | 8% | 6% | 23% | 18% |
| Deer mice | 8% | 12% | 17% | 1% | 11% |
| Pack rats | 1% | 0% | 0% | 0% | 5% |
| Other | 3% | 2% | 2% | 2% | 4% |

Source: Readex Research; Number of respondents: 305

WHAT'S YOUR TYPE?

The rodent species technicians encounter depend largely on the geographic markets they serve. In the Midwest and Northeast, for example, customers are far more likely to call about mice than rats; the opposite is true in the West and South. Mice represent the largest percentage of rodent calls for 92 percent of PMPs in the Midwest and 90 percent of those in the Northeast; rats account for just 6 and 8 percent, respectively. In the West, 77 percent of PMPs said rats represent the largest percentage of their rodent calls; 20 percent said mice do. Southern PMPs reported a more balanced mix, with 57 percent saying rats, and 42 percent mice, dominate their service calls.

"When I first started doing this 20 years ago, we had virtually no rodent calls — maybe the occasional field mouse," said Ryan Ewalt, general manager, Victory Pest Control, Myrtle Beach, S.C. "Now that Myrtle Beach is one of the fastest-growing areas in the U.S., rats are being displaced by development and are looking for new homes."



Pulling Out All The Stops

As demand for rodent control continues its upward trajectory in most geographies, pest management leaders are optimistic about revenue growth, with 65 percent of PMPs telling PCT they expect rodent revenues to be up year-over-year in 2025. That's probably a good bet, given rodent services accounted for 24 percent of total revenue for the average pest management company in 2024, and more than half of survey respondents (56 percent) reported it has become a more significant portion of their business over the past five years.

Recognizing rodent work's growing business potential, company leaders are investing in new solutions and strategies. Some operations, such as Burns Pest Elimination in Phoenix, Ariz., have even built dedicated rodent teams.

"It's a matter of putting client needs first — of responding to rodent challenges faster and with a high level of expertise," said Burns Technical Director Jeff Keller. "For the past five years, our

rodent department technicians have managed about 90 percent of our rodent calls, while our regular technicians focus on insects and indoor pests. The rodent team handles our large bait station accounts, carbon dioxide programs and trapping programs with 10 or more devices."

David Turner, assistant general manager at National Exterminating Company in Newport News, Va., agrees that tough rodent infestations require specialists. "Controlling insects is a chemical and mechanical process; it's usually fairly easy to figure out where ants are coming from and then treat them, for example. Rodent work is different. Our rodent

technicians go through intense training with upper management, and many have been in the field for 20 years or more. They know how to look for rodents, find their entrance points, document what's happening and put a plan into place."

Burns Pest Elimination also has exclusion specialists on staff, who this year began performing smoke tests to check for plumbing leaks. "You have to go in with your whole arsenal. The clients will dictate what they want for cost purposes, but if you don't come in sealing, looking for entry points and using multiple baits, you're not likely to be successful," Keller said. •

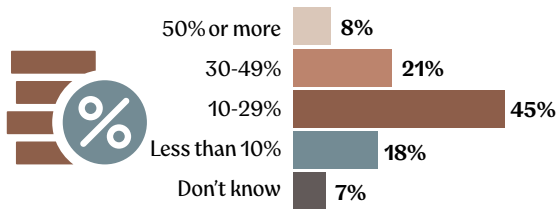
SUBSCRIBER MENTALITY

While the majority of PMPs (60 percent) said they offer customers the option of buying rodent management services either as part of a recurring service program or as a stand-alone service, a growing number (25 percent, versus 17 percent in 2024) are offering rodent services only as part of a recurring program. The percentage who offer rodent services only on a standalone basis has declined from 23 percent in 2024 to just 15 percent today.



RODENT REVENUE

About what percentage of your location's overall service revenue in the last calendar year was generated by rodent control services?



Source: Readex Research; Number of respondents: 305

GREAT EXPECTATIONS

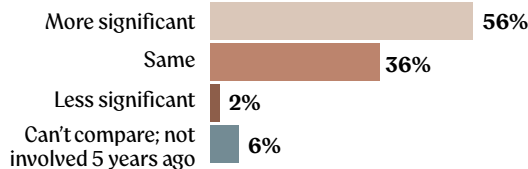
Compared with last year, how do you expect the percentage of revenue generated from your location's rodent control services to change this year?



Source: Readex Research; Number of respondents: 305

MEANINGFUL CHANGE

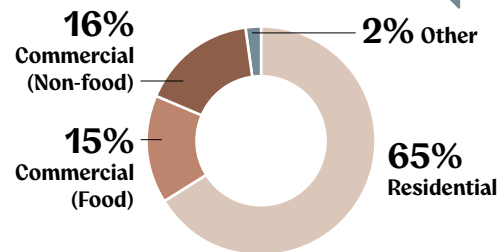
In the past five years, has rodent control become a more or less significant portion of your location's business?



Source: Readex Research; Number of respondents: 305

FOLLOW THE MONEY

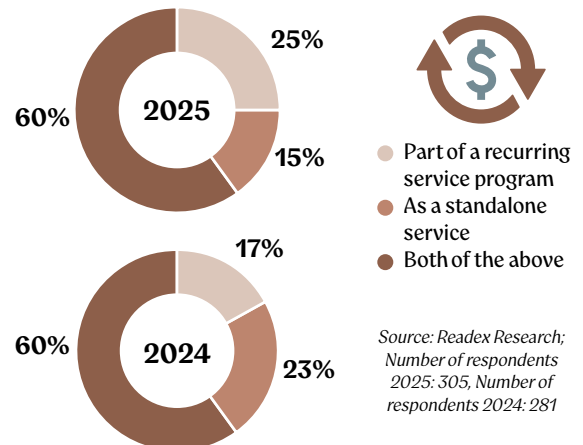
Which rodent control market generates the most income for your location?



Source: Readex Research; Number of respondents: 305

STAND-ALONE VS. RECURRING

Is rodent control a stand-alone paid service or included as part of your recurring service program?



Source: Readex Research; Number of respondents 2025: 305, Number of respondents 2024: 281

ABOUT THE SURVEY

The PCT 2025 State of the Rodent Control Market survey was sponsored by Bell Laboratories and compiled by Readex Research, a privately held research firm in Stillwater, Minn. A sample of 10,345 pest control company owners, partners, executives, presidents, technical directors, general managers and branch managers was systematically selected from the PCT database. Data was collected from 322 respondents — a 3 percent response rate — via online survey from Aug. 18-Sept. 9, 2025. The margin of error for percentages, based on the 305 respondents whose company locations offer rodent control services, is plus or minus 5.5 percentage points at the 95 percent confidence level. Charts may not add up to 100 percent due to rounding.



The More You Know, The Better the Program



While there are tried and true tools for managing rodent populations — baits and traps being the most popular, with 98 and 91 percent of PMPs (respectively) using them — the most effective rodent programs also evolve as knowledge grows and technologies improve. Forty-three percent of PMPs told PCT they have modified, or are planning to modify, their rodent management programs due to impending EPA rodenticide label changes, but they're updating their programs to improve efficiency and effectiveness, too.

Melisa Arnold, owner of Horizon Pest Solutions in New Cambria, Kan., explained how she has evolved her program over time. "Years ago, I would just go in, put a bunch of bait stations down and tell the client I'd be back in a couple days to check. Today, I'm much more proactive with the inspection and service: Residential customers get three services in the first week, two in the second week, and one in each of the following two weeks. I'm more cognizant of family dynamics, too — allergies, pets, farm animals, etc. Depending on the situation, I'll usually start with bait and snap traps inside stations so there's no harm to pets or people."

Once the monthly course of treatment is complete, Arnold assesses the results. "If rodent activity persists, I repeat the service, reevaluate whether the customer

is doing their part to clean, and reinspect to determine whether there are indoor or outdoor conducive conditions that have changed over the course of treatment. I also switch the type of bait and traps or the locations where I have them set," she said.

INCLUDING EXCLUDING. For Victory Pest Control in Myrtle Beach, S.C., keeping up with demand for rodent services in hotels and vacation homes, as well as other residential accounts, has required not only a smart baiting and trapping strategy, but also exclusion services. "We're getting into a lot of metal bending, boxing the soffit area in with a sheet of metal that we bend accordingly to keep rodents from utilizing past trails," explained Ryan Ewalt. "In contrast to hardwire mesh, the solid metal flashing offers a seal that rats, mice and squirrels can't chew or tear through."

David Turner shared that National Exterminating Company, Newport

News, Va., uses "serious foam with metal shards in it" for exclusion work. The foam is specifically designed for rodents, including smelling and tasting bad to them so they won't go back to the area. It's one of many improvements National Exterminating has made to its rodent program in recent years, Turner said.

"We have a burgeoning population of rodents in our area, which comes with the growing resident population, and so we've changed our rodent program to be more strategic," he explained. "For example, instead of the old-school practice of putting bait around a building and hoping for the best, we're doing more trapping and monitoring so we can identify the kinds of populations we're dealing with and where they're coming from. Plus, we're doing a lot of exclusions, because you typically can't resolve a rodent issue unless you exclude the area."

Turner shared that National's program also includes a repellent that stirs up rats in large industrial buildings, pushing them off their regular routines to make them more vulnerable to treatment protocols. "We try to think outside the box, and with every customer, it's a case-by-case basis; there's no one-size-fits-all rodent program. We send an inspector out for each individual case and tailor the solution to the specific situation."

ELECTRONIC MONITORING GAINS. More PMPs are using electronic moni-



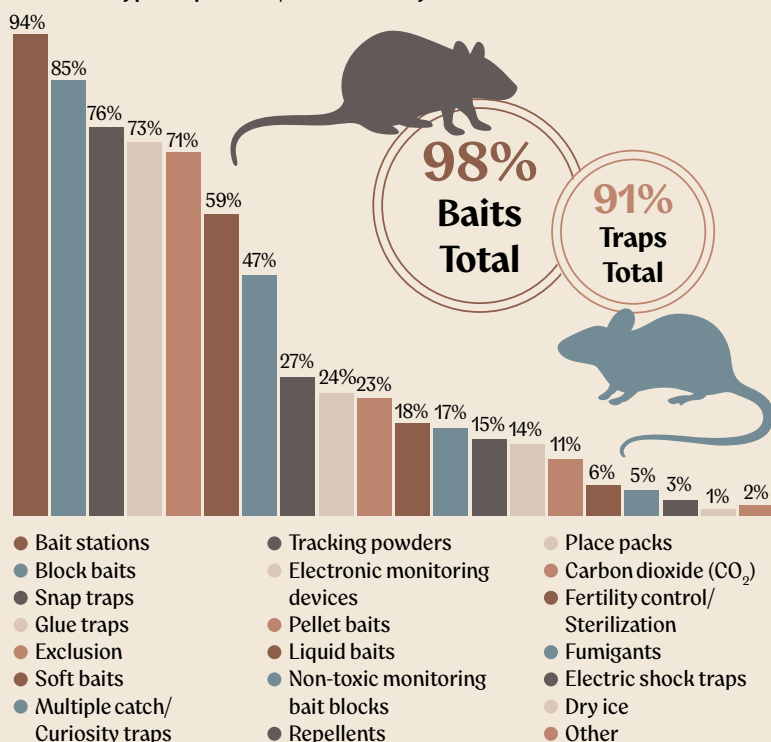
toring tools than ever before. In 2024, 12 percent of PMPs reported using these devices; in 2025 that usage has doubled, to 24 percent. Jeff Keller says electronic monitoring equipment has become integral to Burns Pest Elimination's rodent program.

"When we get activity triggers via remote monitoring, we can rebait

stations and reset traps faster versus the old way of monthly checks," he said. "We've been using electronic monitors for the past two years, and it has made a huge difference. Our clients appreciate that we're not only reacting faster to their needs but also providing them with more data than we ever could in the past." •

LOCKED AND LOADED

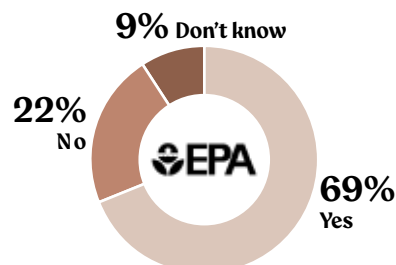
Which types of products/services does your location use to control rodents?



Source: Readex Research; Number of respondents: 305; Respondents could select multiple answers

RODENTICIDE RULES

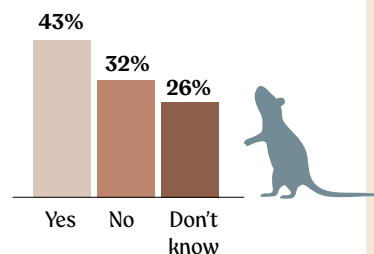
Are you concerned about impending EPA label changes for rodenticides?



Source: Readex Research; Number of respondents: 305

MODIFIED METHODS

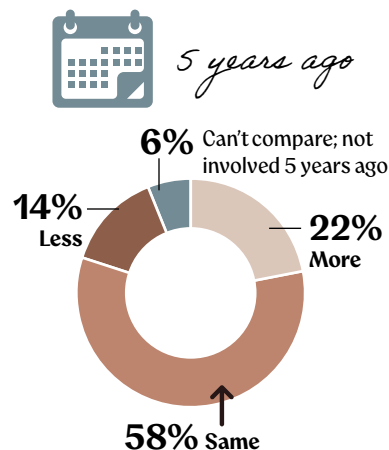
Has your location modified, or is it planning to modify, its rodent management program due to impending EPA rodenticide label changes?



Source: Readex Research; Number of respondents: 305

RETHINKING RELIANCE

Are your rodent control services more or less dependent on rodenticide use today than they were five years ago?



Source: Readex Research; Number of respondents: 305

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