

Top 100 MAP & MORE

Editor's note: The following pages of this special 25th anniversary Top 100 insert include a map of the Top 100 firms as well as a deep dive into weather patterns, U.S. Census Bureau data and emerging pest trends. But that's not all. We interviewed PMPs in these regions to find what market conditions are affecting today's business operations. There are additional interviews online — and an interactive map with all of the Top 100 data — so visit the digital version of this issue (pctonline.com) for more Top 100 facts and figures!



PMPs Across the U.S. Speak Out

Carolinas, Florida, Texas

Simplifying to Grow Stronger.

For Josh Langdon, president of Charlotte, N.C.-based Aruza Pest Control (No. 32), growth isn't the only metric that matters. After years of rapid expansion driven by door-to-door sales, his company intentionally pulled back. The result: growth slowed to about 6% below typical targets, but with a stronger foundation. (The company has locations in Florida, North Carolina, South Carolina and Texas.) "We wanted to build our culture around relationships," he said. That meant redefining mission, vision and values and aligning the business around them. Langdon's focus is durable growth, including opening branches in 2026 to grow the firm's footprint.

Simplifying in a Crowded Market.

As competition intensifies, complexity can become a liability. Langdon's team has streamlined service offerings and messaging, focusing on clarity and consistency. "Find the right customers and set the right expectations," he said. With more companies competing across digital channels and traditional sales, standing out isn't just about visibility. It's about delivering a clear, reliable experience. At the same time, strong referral networks remain a key growth driver, reinforcing the company's emphasis on customer satisfaction. In a crowded market, simplicity is becoming a competitive advantage, he said.

Shifting Dynamics.

In fast-growing regions like Charlotte and Raleigh, N.C., demand for pest control remains strong, but the dynamics are evolving. New construction is booming, creating a steady pipeline of potential customers, while fewer home sales are reducing inspection-driven work. Meanwhile, marketing is becoming more competitive as more companies vie for attention in expanding metros. Langdon sees opportunity in the fundamentals: homeowners still want to protect their investment from damaging pests. "People are still taking care of their homes," Langdon said.

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Top 100 MAP

Many external factors affect pest management businesses — weather, invasive pests, business conditions and more. In addition to displaying the location of the Top 100 firms, the map at right dives into some of the conditions impacting companies around the country. Are you seeing similar trends?



Editor's note: Each dot represents a Top 100 firm. (You may not see 100 dots because there are several cities with more than one company.) Maroon text highlights weather extremes, green is business data and blue is about diseases/pests. PCT interviewed more than a dozen PMPs about business conditions in their area. Scan the QR code to read how your peers are handling business challenges and taking advantage of opportunities.

INTERACTIVE MAP

PCT's online coverage includes an interactive map that shows the locations (and more!) of each of the Top 100 firms. Visit the map at bit.ly/4clCkQI or by scanning the QR code above.



MAP KEY

- maroon = weather
- green = business data
- blue = diseases/pests



Mosquito Watch

West Nile virus (WNV) continues to shape mosquito control demand across much of the U.S. The top five states with reported WNV cases in 2025 were **Colorado, Illinois, Texas, Minnesota and California**. Data from the Centers for Disease Control and Prevention (CDC) shows WNV is the leading cause of disease spread by mosquitoes in the contiguous U.S. That sustained presence reinforces the need for **proactive mosquito programs** and **seasonal treatment strategies** in high-risk markets. *Source: CDC*

California, an Industry Anchor

California remains one of the country's largest pest service markets, with firms operating across **highly diverse climate zones**. The state has one of the largest pest control markets in the U.S., with a population of roughly **39.4 million people** and about 101,000 housing units permitted in 2024, according to U.S. Census Bureau data. It also consistently ranks among the top three states for Top 100 companies (nine this year). Its size and regional diversity keep driving steady demand across **urban, suburban and agricultural markets**.

Source: U.S. Census Bureau

WEST Drought + Wildfire

In the West, **prolonged drought** and **expanding wildfire seasons** are pushing pests toward structures, as extreme weather events tracked by National Oceanic and Atmospheric Administration (NOAA) increasingly disrupt natural habitats and **drive insects and rodents indoors**.

Source: NOAA and Climate Central

Strategic Scaling

Fast-growing markets are shaping where Top 100 companies scale next. Princeton, Texas, was the fastest-growing U.S. city from 2023 to 2024 (+30.6%). The city is part of the **booming Dallas-Fort Worth region**, fueling expansion and new technician hiring.

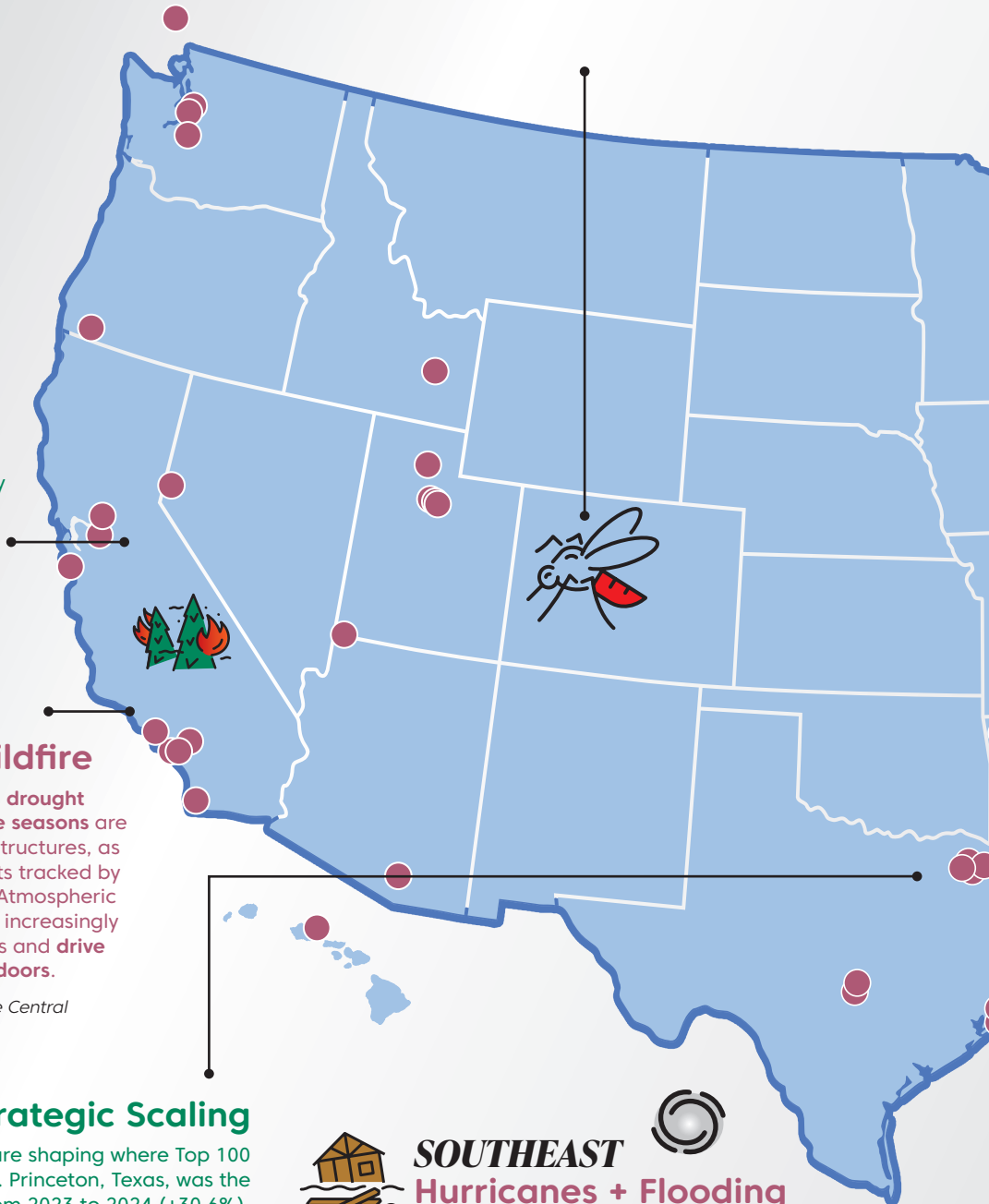
Source: U.S. Census Bureau



SOUTHEAST Hurricanes + Flooding

More frequent **billion-dollar storms** are driving demand across the Southeast, where flooding and hurricane activity **increase mosquito, termite and rodent pressure**. According to NOAA's disaster dataset, there's been a sharp rise in **high-cost events** in recent years.

Source: NOAA and Climate Central



MIDWEST

Heat Swings + Heavy Rain + Tornadoes

Across the Midwest, sharper swings between **heavy rainfall and heat** are intensifying seasonal pest pressure, particularly for **mosquitoes and stinging insects**. Flooding in Kentucky and tornadoes across the region were notable in 2025. *Source: Purdue University*

Ticked Off

Lyme disease continues to expand across the Northeast and Upper Midwest, with more than 89,000 cases reported in 2023 and **significantly higher estimated diagnoses each year**, according to the CDC. As tick populations spread into new areas, companies are seeing **increased demand for tick prevention services**, particularly in suburban and wooded residential corridors.

Source: CDC



NORTHEAST

Stronger Storms + Extreme Winters

In the Northeast, **stronger storms** and milder or **extremely cold winters** are extending pest seasons and contributing to **increased tick and rodent activity**.

Source: NOAA & National Weather Service

Southeast Surge

The Carolinas are emerging as **key growth markets**, with North Carolina accounting for about 7% of U.S. housing permits in 2024.

A strong influx of **new residents and suburban development** are feeding steady demand and expansion across the region.

Source: Census Bureau



A Traveling Concern

Dengue remains a growing concern despite most U.S. cases being transmitted to **travelers who are infected elsewhere**. The CDC reported that cases surged across the Americas in 2024 and 2025. For pest control providers, that trend underscores **rising awareness and demand for mosquito control** in coastal and high-travel regions.

Source: CDC



Florida Keeps Growing

Florida continues to be a **growth powerhouse**, evidenced by Top 100 firms spread throughout the state. Florida accounted for about **13% of all U.S. housing units** in 2024, and Jacksonville recently crossed the 1 million population mark. That combination of population growth, new rooftops and constant **humidity-driven pest pressure** is sustaining expansion, with **storm-related disruptions** adding to service demand. *Source: U.S. Census Bureau*

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More PMPs Speak Out

Here's what PMPs from Top 100 firms said about business and pest conditions in their regions. Read more from Ohio, Pennsylvania, Missouri and others at bit.ly/4vsT7tV.

Massachusetts

Consolidation Creates an Opening. As consolidation reshapes the pest control industry, mid-sized, family-owned companies are becoming rarer. In the Northeast, Agawam, Mass.-based Gerald Lazarus sees a clear shift.

"There are only a few of us left of my size," said the president of Braman Termite & Pest Elimination (No. 52), noting the rapid pace of acquisitions over the past decade. But rather than squeezing independents out, that consolidation is creating opportunity, he said. Employees and customers alike are gravitating toward companies that still offer direct access and a personal touch, he said. "When you call, you're talking to the owner," Lazarus added.



Oh, Rats! Rodent pressure isn't letting up. In fact, it's intensifying. Lazarus points to increasing rodent populations driven by environmental shifts and reproductive cycles that can quickly escalate infestations. "It's year-round," he said, adding that demand for rodent control continues to grow in dense urban markets like Boston.



Virginia

Growth Gets Harder, More Intentional.

Rapid growth is easier at smaller scales, but sustaining it is a different challenge. "You can grow 80% when you're doing \$600,000," said Shon Vodila, president, Accel Pest Control (No. 87), Virginia Beach.

Now operating at more than \$11 million in revenue with 80 employees across multiple offices, his focus has shifted from pure expansion to structure and culture. A new administrative hub and push to bring remote staff back into a more connected environment reflect a broader priority: maintaining consistency as the company scales.

Unpredictable Headwinds. Operating in a military-driven market brings both opportunity and volatility. In Virginia Beach, frequent move-ins and move-outs create a steady flow of new customers — but also disrupt retention. "It can hurt, but it also offers opportunity," Vodila said. External factors add another layer of unpredictability. Government spending delays can ripple quickly through the local economy, prompting customers to pause service or delay payments.



Illinois

The Boomerang Effect. Even in an uncertain economy, pest control demand has a way of coming back. Chase Goodeill, owner and CEO of Pest Control Consultants (No. 89) in Chicagoland, has seen a consistent pattern. When customers cancel service, the pests return — and so do they. "When people turn off pest control, the bugs come back," he said.

The result is a kind of boomerang effect, with customers signing up for service again at higher rates after experiencing the consequences firsthand. That dynamic is helping sustain growth, even as consumers watch spending. In fact, Goodeill's company is seeing a surge in new customers, as more homeowners opt for year-round service and monthly billing.



Year-Round Demand. Seasonality is no longer a limitation. It's an opportunity to add value. In colder Midwest markets, Goodeill's team has leaned into winter services like rodent control and preventive treatments to maintain engagement when general pest activity slows.

"When general pest control is down, the rodent piece is up," he said. That shift is helping drive adoption of year-round service plans, even in regions with harsh winters. At the same time, customers are demanding speed and convenience, from same-day service to online scheduling and transparent pricing. The companies keeping pace, Goodeill said, are the ones aligning their operations with how today's customers want to buy.



Hawaii

Paradise But With Pressure. In Hawaii, warm temperatures, dense plant life and a steady flow of goods create ideal conditions for pests to thrive year-round. This includes emerging threats like coconut rhinoceros beetles and little fire ants, both of which spread quickly and can cause significant damage. With few natural predators and a climate that rarely slows activity, pest pressure remains consistently high. "If it can get here, it can flourish here," said John Speed, president, Kilauea Pest Control (No. 82), Kailua.



Extreme Conditions, Real Impacts. Extremes are the norm in Hawaii. Speed points to a mix of drought, flooding, volcanic activity and even air quality issues tied to eruptions. "We've got it all," he said. Those conditions can disrupt operations and local economies, particularly in areas still recovering from events like the 2023 Maui wildfires. While growth has remained positive, it hasn't met expectations, reflecting broader economic headwinds in certain regions.

Cost of Living Shapes Workforce. In one of the most expensive places to live in the U.S., labor strategy is evolving. Home prices top \$1 million in many areas, making hourly wages alone less sustainable for workers. Speed is exploring production-based pay models to create stronger earning potential and long-term career paths. "You have to provide a career," he said. As companies compete for talent in high-cost markets, compensation models and the ability to offer growth are critical differentiators, Speed said. ●

