

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"Warmer weather trends mean higher pest activity and incidence of pest-borne diseases. While consumer concern about pest-borne disease is relatively low, increased incidence of West Nile Virus, Lyme disease, and other diseases could mean greater concern if warmer weather patterns persist."

 Shannon Romanowski, Senior Beauty & Personal Care Analyst

# This report looks at the following areas:

- Moderate sales growth
- · Limited incidence of product and service usage
- Product and service selection starts with fast results

For the purposes of this report, Mintel has used the following definitions:

This report covers both pest control products and service providers.

- Pest control products consist of the following subsegments: outdoor pest control
  products, indoor pest control products, pest control devices, and multipurpose pest
  control products. Personal insect repellents are included in the outdoor pest control
  products and pest control devices subsegments.
- The total market for the residential service sector is covered, but company and brand data are not available for pest control service companies. Pest control services only cover services that are sold to residential customers.

# BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

+86 (21) 6032 7300

+61 (0) 2 8284 8100

EMAIL: reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

#### **Table of Contents**

#### Overview

What you need to know

Definition

## **Executive Summary**

#### The issues

#### Moderate sales growth

Figure 1: Sales of pest control and repellents, by segment, 2010-20

#### Limited incidence of product and service usage

Figure 2: Pest control product and service use, June 2015

## Product and service selection starts with fast results

Figure 3: Select pest control product and service attributes, June 2015

#### The opportunities

#### Focus on family households

Figure 4: Pest control product and service use, by marital status and presence of children, June 2015

## Opportunity for sprayless applications

Figure 5: Any type of pest control and repellent products used, June 2015

# Natural, non-chemical products potentially drive growth

Figure 6: Attitudes toward safety of pest control products and services, June 2015

## What it means

# The Market - What You Need to Know

Category growth is steady, but slow

Warmer weather trends could boost future sales

Bedbug activity is on the rise

Family households are heavier category users

# Market Size and Forecast

## Moderate growth projected as pest issues become more pervasive

Figure 7: Total US sales and fan chart forecast of pest control and repellents, at current prices, 2010-20

Figure 8: Total US sales and forecast of pest control and repellents, at current prices, 2010-20

## Market Breakdown

## Residential services account for majority of category sales

Figure 9: Share of pest control and repellent sales, by segment, 2015

# Residential services grow faster than products

Figure 10: Sales of pest control and repellents, by segment, 2010-20

## Market Perspective

Perceived health risks of chemical products may spur DIY products



VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

APAC +61 (0) 2 8284 8100

MAIL: reports@mintel.com



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 11: Importance of non-toxic as a purchase influencer when selecting pest control and repellents, June 2015

#### **Market Factors**

Seasonal fluctuations impact need for pest control

Bedbugs increase across US

Married consumers, those with families most likely to use

Figure 12: Married share of adult population, 2003-13

Figure 13: Households, by presence of own children, 2003-13

Key Players - What You Need to Know

Spectrum Brands outperforms bigger players

Orkin sees growth in the residential services market

Future growth lies with new formats, natural options

Manufacturer and Service Provider Sales of Pest Control and Repellents

SC Johnson leads but Spectrum gains 14.3% with outdoor products

Terminix leads services brands

Figure 14: Orkin YouTube ad, 2015

Manufacturer sales of pest control and repellents

Figure 15: Manufacturer sales of pest control and repellents, 2014 and 2015

What's Working?

Spectrum's Hot Shot brand grows in all subsegments

Figure 16: Hot Shot "Save the Day" television ad, 2015

Figure 17: MULO sales of Hot Shot pest control and repellents, 2014 and 2015

SC Johnson maintains lead with Raid and OFF!

Tomcat devices offer multiuse, versatile, and humane rodent control

Figure 18: Tomcat YouTube ad, 2014

Figure 19: MULO sales of Tomcat pest control devices, 2014 and 2015

What's Struggling?

OFF! repellent devices decline substantially

Figure 20: MULO sales of OFF! pest control devices, 2014 and 2015

Other Spectrum indoor brands drop as Hot Shot grows

Figure 21: MULO sales of Spectrum indoor pest control products, 2014 and 2015

What's Next?

Preventive products go beyond eradication

Figure 22: Raid YouTube ad, 2014

Chemical-free and natural products

The Consumer – What You Need to Know

Moderately high incidence of pest issues, though consumers don't necessarily take action

Sprays most commonly used format of pest control products

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

APAC +61 (0) 2 8284 8100



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Pest control users want quick results

Worry about product safety is widespread

Despite increased incidence of pests, low concern about disease

Incidence of Pest Issues

Incidence of common pests is relatively high but many report no issues

Figure 23: Incidence of pest issues, June 2015

Southern and western regions most likely to experience pest issues

Figure 24: Any incidence of pest issues, by region, June 2015

Pest Control Product Use

Home product usage higher than yard product usage

Figure 25: Pest control product use, June 2015

Family households represent opportunity for products brands

Figure 26: Pest control product use, by marital status and presence of children, June 2015

Hispanics more apt than non-Hispanics to use pest control products

Figure 27: Pest control product and service use, by Hispanic origin, June 2015

Pest Control Service Use

Low incidence of pest control services in the last year

Figure 28: Pest control service use, June 2015

Family households more reliant on pest control services

Figure 29: Pest control services use, by marital status and presence of children, June 2015

Hispanics report above-average use of pest control services

Figure 30: Pest control service use, by Hispanic origin, June 2015

Types of Pest Control and Repellents Products Used

Sprays are most used format

Figure 31: Types of pest control and repellents products used, June 2015

Hispanics more apt to use devices than non-Hispanics

Figure 32: Use of pest control devices, by Hispanic origin, June 2015

Important Pest Control Product Attributes

Fast-acting, easy-to-use products appeal most, but non-toxic is important

Figure 33: Important pest control product attributes, June 2015

Boomers most likely to look for fast-acting, easy application, non-toxic

Figure 34: Important pest control product attributes, by generations, June 2015

Important Pest Control Service Attributes

Fast-acting is less important when selecting services

Figure 35: Important pest control service attributes, June 2015

Women more apt to look for non-toxic, natural/organic services

Figure 36: Important pest control service attributes, by gender, June 2015

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

APAC +61 (0) 2 8284 8100



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Attitudes toward Pest Control Products and Services

## Low confidence in product safety, but few feel services are more effective

Figure 37: Attitudes toward safety of pest control products and services, June 2015

## Relatively low level of concern about pest-borne disease and damage

Figure 38: Attitudes toward pests, June 2015

#### Millennials concerned about pests but least savvy using products

Figure 39: Attitudes toward pests and pest control products, by generations, June 2015

# Appendix – Data Sources and Abbreviations

Data sources

Sales data

Fan chart forecast

Consumer survey data

Abbreviations and terms

Abbreviations

#### Appendix - Market

#### Market size and forecast

Figure 40: Total US sales and forecast of pest control and repellents, at inflation-adjusted prices, 2010-20

## Market breakdown

Figure 41: Total US retail sales and forecast of pest control products and services, by segment, at current prices, 2013 and 2015

Figure 42: Total US sales and forecast of pest control services, at current prices, 2010-20

Figure 43: Total US sales and forecast of pest control products, at current prices, 2010-20

Figure 44: Total US retail sales of pest control products, by type, at current prices, 2009-19

# Appendix – Key Players

Figure 45: MULO sales of outdoor pest control products, by leading companies and brands, rolling 52 weeks 2014 and 2015

Figure 46: MULO sales of pest control devices, by leading companies and brands, rolling 52 weeks 2014 and 2015

Figure 47: MULO sales of indoor pest control products, by leading companies and brands, rolling 52 weeks 2014 and 2015

Figure 48: MULO sales of multipurpose pest control products, by leading companies and brands, rolling 52 weeks 2014 and 2015

# Appendix – Consumer

# Correspondence analysis

Figure 49: Correspondence analysis - Important pest control product and service attributes, June 2015

## Correspondence analysis methodology

Figure 50: Important pest control product and service attributes, June 2015

# Experian Simmons analysis

Figure 51: Brands of insect repellents used in household, by select demographics, February 2014-March 2015

Figure 52: Types of insecticides used in household, by select demographics, February 2014-March 2015

Figure 53: Brands of insecticides used in household, February 2014-March 2015



VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

APAC +61 (0) 2 8284 8100