

## Pest Control and Repellents - US - June 2013

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.



“Market players will be able to rely on consumers’ continued usage of pest control products and services to deal with pest problems in their home. However, consumers are mostly reactive when it comes to pest control activities, they have concern around products’ chemical content, and bedbug infestations continue to spread across the U.S.”

– Gabriela Elani, Home and Personal Care Analyst

### In this report we answer the key questions:

- Consumers mostly reactive, not proactive, when it comes to pest control
- Concern around products’ chemical and ingredient content
- Bedbugs cause concern for both consumers and businesses

The U.S. pest control market has grown modestly in the past few years, with the expectation that growth will continue into 2017. In 2012, the market achieved total retail sales of \$8.6 billion, posting a 13% increase during 2007-12. Consumers continue to rely on pest control services and store-bought pest control products to eliminate pest problems that arise in their homes. Products and services have become necessary expenditures as pest issues are unlikely to resolve themselves and have the potential to impact the health and even safety of the household.

There could be opportunities for market players to accelerate growth and drive increased usage of both household pest control products and insect repellents. Consumers mainly use products or hire a service when they see an actual pest or signs of an infestation, and market players could focus on promoting products for preventive maintenance purposes. Bedbugs are a source of concern as infestations continue to spread across the U.S. and consumers have an interest in preventive bedbug products and services. Finally, market players may be able to increase repellent usage by exploring product innovations and by exploring ways to assuage consumers’ concerns around using products on their skin that contain harmful ingredients and chemicals. New format innovations, or integrating more natural bug-repelling ingredients, could be means of achieving this.

BUY THIS  
REPORT NOW

VISIT:  
[store.mintel.com](http://store.mintel.com)

CALL:  
EMEA  
+44 (0) 20 7606 4533

Brazil  
0800 095 9094

Americas  
+1 (312) 943 5250

APAC  
+61 (0) 2 8284 8100

EMAIL:  
[oxygen@mintel.com](mailto:oxygen@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

# Pest Control and Repellents - US - June 2013

**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

### Scope and Themes

- What you need to know
- Definition
- Data sources
- Sales data
- Consumer survey data
- Advertising creative
- Abbreviations and terms
- Abbreviations
- Terms

### Executive Summary

#### The market

Figure 1: Total U.S. retail sales and fan chart forecast of pest control market, at current prices, 2007-17

#### Market factors

Bedbugs continue to spread across the U.S.

Shaky consumer confidence drives reactive pest control behavior

Weather patterns and seasonal changes drive pest activity

Consumers have concerns around chemical content and harmful ingredients

#### Segment performance

Figure 2: Total U.S. retail sales of pest control products and services, by segment, at current prices, 2010 and 2012

#### Market players

Figure 3: MULO sales of pest control products, by leading companies, 2012

#### The consumer

Insecticide usage steady across households but repellent usage varies by income

Figure 4: Usage of insecticides and insect repellents, by household income, October 2011-November 2012

Use of household sprays and repellents most common pest control activities

Figure 5: Household pest control activities, March 2013

Consumers concerned about chemicals and ingredients in repellent products

Figure 6: Concerns around using personal insect repellents, March 2013

Consumers interested in repellents with more natural ingredients

Bedbugs carry a strong stigma

Laundry-related bedbug offerings and detection tools command most interest

Figure 7: Interest in bedbug detection and prevention offerings, March 2013

#### What we think

### Issues and Insights

Consumers mostly reactive, not proactive, when it comes to pest control

The issues

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)  
 CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100  
 EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)

# Pest Control and Repellents - US - June 2013

**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.

## The Implications

Concern around products' chemical and ingredient content

## The Issues

## The Implications

Bedbugs cause concern for both consumers and businesses

## The Issues

## The implications

## Trend Applications

Trend: Extend My Brand

Trend: Prove It

Mintel Futures: Human

## Market Size and Forecast

### Key points

Modest growth expected

### Sales and forecast for pest control market

Figure 8: Total U.S. retail sales and forecast for sales in the pest control market, at current prices, 2007-17

Figure 9: Total U.S. retail sales and forecast of pest control market, at inflation-adjusted prices, 2007-17

### Fan chart forecast

Figure 10: Total U.S. retail sales and fan chart forecast of pest control market, at current prices, 2007-17

## Market Drivers

### Key points

Weather and seasonal temperatures drive pest activity

Bedbug outbreaks continue

Shaky consumer confidence drives reactive behavior

Figure 11: University of Michigan's index of consumer sentiment (ICS), 2008-13

Consumer concern around chemical content and harmful ingredients

## Segment Performance

### Key points

Market mostly made up of services

Sales of pest services and products, by segment

Figure 12: Total U.S. retail sales of pest control services and retail products, by segment, at current prices, 2010 and 2012

## Segment Performance – Pest Control Services

### Key points

Services see consistent growth

Sales and forecast of pest control services

Figure 13: Total U.S. retail sales and forecast of pest control services, at current prices, 2007-17

## Segment Performance – Pest Control Products

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)

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

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)

# Pest Control and Repellents - US - June 2013

**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.

## Key points

Pest control products experience strong growth during 2011-12

Sales and forecast of pest control products

Figure 14: Total U.S. retail sales and forecast of pest control products, at current prices, 2007-17

Most subsegments see gains, while multipurpose products struggle

Figure 15: Total U.S. retail sales of pest control products, by subsegment, at current prices, 2010 and 2012

Figure 16: Total U.S. retail sales of pest control products, by subsegment, at current prices, 2007-12

## Retail Channels

### Key points

"Other retail channels" captures most pest control sales

Sales of pest control products and services, by channel

Figure 17: Total U.S. retail sales of pest control products and services, by channel, at current prices, 2010-12

Figure 18: Total U.S. retail sales of pest control products and services, by channel, at current prices, 2007-12

## Leading Companies

### Key points

SC Johnson leads the market

MULO manufacturer sales of pest control products

Figure 19: MULO sales of pest control products, by leading companies, 2012 and 2013

## Brand Share – Outdoor Pest Control Products

### Key points

SC Johnson leads in outdoor products

Garden-specific pest control products perform well

MULO sales of outdoor pest control products

Figure 20: MULO sales of outdoor pest control products, by leading companies, 2012 and 2013

## Brand Share – Pest Control Devices

### Key points

Most companies see declines but Reckitt Benckiser is growing

MULO sales of pest control devices

Figure 21: MULO sales of pest control devices, by leading companies, 2012 and 2013

## Brand Share – Indoor Pest Control Products

### Key points

Growth across the board

MULO sales of indoor pest control products

Figure 22: MULO sales of indoor pest control products, by leading companies, 2012 and 2013

## Brand Share – Multipurpose Pest Control Products

### Key points

Declines across the segment

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)

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

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)

# Pest Control and Repellents - US - June 2013

**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.

## MULO sales of multipurpose pest control products

Figure 23: MULO sales of multipurpose pest control products, by leading companies, 2012 and 2013

## Innovations and Innovators

### Convenience and ethical/environmental claims most common among new product launches

Figure 24: Pest control new product launches, by claims category, 2007-13

Figure 25: Pest control product launches, by claims, 2007-13.

### Room- and item-specific products may present growing trend

Citronella candles double as protection and home decor

## Marketing Strategies

### Overview of key marketing strategies

#### Strategy: Focus on bedbugs

Figure 26: FabriClear, "Hey Media Moguls," TV ad, 2013

Figure 27: Bed Defense, "Repel Bedbugs," TV ad, 2013

#### Strategy: Fast-acting performance, merciless on bugs

Figure 28: Raid, "Lost Signal," TV ad, 2013

Figure 29: Ortho, "That's Nasty," TV ad, 2013

#### Strategy: Encouraging outdoor activity

Figure 30: Cutter social media advertisement, 2013

Figure 31: OFF! social media advertisement, 2013

#### Strategy: Touting natural ingredients

Figure 32: Terminix "All Clear" TV ad, 2013

#### Strategy: Positioning service professionals as scientists

Figure 33: Orkin banner advertisements, 2013

Figure 34: Terminix website, 2013

## Usage of Pest Control Products

### Key points

#### Insecticide usage consistent year to year

Figure 35: Types of insecticides used, January 2007-November 2012

#### Insecticide usage steady across households; repellent use varies by income

Figure 36: Usage of insecticides and insect repellents, by household income, October 2011-November 2012

Figure 37: Types of insecticides used, by household income, October 2011-November 2012

#### Presence of children impacts pest control product use

Figure 38: Usage of insecticides and insect repellents, by presence of children in household, October 2011-November 2012

Figure 39: Types of insecticides used, by presence of children in household, October 2011-November 2012

#### Region plays a role in product use

Figure 40: Usage of insecticides, by region, October 2011-November 2012

Figure 41: Types of insecticides used, by region, October 2011-November 2012

## Brand Usage

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)

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

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)

# Pest Control and Repellents - US - June 2013

**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.

## Key points

### Raid and OFF! command highest incidence of use

Figure 42: Brands of insecticides used in the household, by household income, October 2011-November 2012

Figure 43: Brands of insect repellent used in the household, by household income, October 2011-November 2012

### Insecticide and repellent use varies by region

Figure 44: Brands of insecticides used in the household, by region, October 2011-November 2012

Figure 45: Brands of insect repellent used in the household, by region, October 2011-November 2012

## Pest Control Activities

### Key points

#### Usage of aerosols/sprays and insect repellents most common

Figure 46: Household pest control activities, March 2013

#### Own a home? More pests to deal with

Figure 47: Household pest control activities, by primary residence, March 2013

#### Older consumers (and likely homeowners) more likely to perform pest control activities

Figure 48: Household pest control activities, by age, March 2013

#### More affluent consumers likely to utilize pest control service provider

Figure 49: Household pest control activities, by household income, March 2013

## Information Sources

### Key points

#### Past experience and recommendations most impactful for service hire

Figure 50: Information sources for hiring pest control service provider, by gender and age, March 2013

#### Experience comes with age for product use

Figure 51: Information sources for deciding which pest control products to use, by gender and age, March 2013

## Personal Insect Repellent Concerns

### Key points

#### Chemical/ingredient content in repellents causes concern

Figure 52: Concerns around using personal insect repellents, by gender and age, March 2013

#### Parents with young children have concerns about repellents

Figure 53: Concerns around using personal insect repellents, by parents with children and age, March 2013

## Interest in New Insect Repellents

### Key points

#### Greater integration of natural ingredients commands interest

Figure 54: Interest in new types/formats of insect repellents, by gender and age, March 2013

#### Affluent consumers interested in sunscreen with repellents

Figure 55: Interest in new types/formats of insect repellents, by household income, March 2013

#### Parents could prove early adopters of new products

Figure 56: Interest in new types/formats of insect repellents, by parents with children and age, March 2013

## Attitudes Toward Bedbugs

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)

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

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)

## Pest Control and Repellents - US - June 2013

**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.

### Key points

**Bedbugs have a strong stigma**

Figure 57: Attitudes toward bedbugs, by gender and age, March 2013

**Higher-income consumers are more concerned by bedbugs**

Figure 58: Attitudes toward bedbugs, by household income, March 2013

### Interest in Bedbug Offerings

#### Key points

**Laundry-related bedbug offerings prove most interesting**

Figure 59: Interest in bedbug offerings, March 2013

**Women aged 18-54 most interested in preventive bedbug offerings**

Figure 60: Any interest in bedbug offerings, by gender and age, March 2013

**Less affluent consumers interested in preventive products**

Figure 61: Any interest in bedbug offerings, by household income, March 2013

**Parents with young children have strong interest in new bedbug offerings**

Figure 62: Any interest in bedbug offerings, by parents with children and age, March 2013

### Race and Hispanic Origin

#### Key points

**Repellent concerns vary somewhat by race/ethnic origin**

Figure 63: Concerns around using personal insect repellents, by race/Hispanic origin, March 2013

**Natural repellent offerings most compelling**

Figure 64: Interest in new types/formats of insect repellents, by race/Hispanic origin, March 2013

**Attitudes concerning bedbugs vary across segments**

Figure 65: Attitudes toward bedbugs, by race/Hispanic origin, March 2013

**Hispanic and black consumers demonstrate most interest in preventive bedbug offerings**

Figure 66: Any interest in bedbug offerings, by race/Hispanic origin, March 2013

### Information Resources Inc./Builders – Key Household Purchase Measures

Overview of pest control

Outdoor insect/rodent control chemicals

Consumer insights on key purchase measures – outdoor insect/rodent control chemicals

Brand map

Figure 67: Brand map, selected brands of outdoor insect/rodent control chemicals buying rate, 52 weeks ending June 24, 2012

Brand leader characteristics

Key purchase measures

Figure 68: Key purchase measures for the top brands of outdoor insect/rodent control chemicals, by household penetration, 52 weeks ending June 24, 2012

Insect/rodent control devices

Consumer insights on key purchase measures – insect/rodent control device segment

Brand map

Figure 69: Brand map, selected brands of insect/rodent control device, by household penetration, 52 weeks ending June 24, 2012

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)

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

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)

## Pest Control and Repellents - US - June 2013

**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.

### Brand leader characteristics

#### Key purchase measures

Figure 70: Key purchase measures for the top brands of insect/rodent control device, by household penetration, 52 weeks ending June 24, 2012

#### Indoor insect/rodent control chemicals

#### Consumer insights on key purchase measures – indoor insect/rodent control chemicals

#### Brand map

Figure 71: Brand map, selected brands of indoor insect/rodent control chemicals buying rate, by household penetration, 52 weeks ending June 24, 2012

### Brand leader characteristics

#### Key purchase measures

Figure 72: Key purchase measures for the top brands of indoor insect/rodent control chemicals, by household penetration, 52 weeks ending June 24, 2012

## Appendix – Other Useful Consumer Tables

### Brand usage

Figure 73: Brands of insecticides used in the household, January 2007-November 2012

Figure 74: Brands of insecticides used in the household, by presence of children in household, October 2011-November 2012

Figure 75: Brands of insect repellent used in the household, by presence of children in household, October 2011-November 2012

Figure 76: Brands of insect repellent used in the household, by race/Hispanic origin, October 2011-November 2012

### Pest control activities

Figure 77: Household pest control activities, by region, March 2013

### Information sources

Figure 78: Information sources for deciding which pest control products to use, by household income, March 2013

Figure 79: Information sources for hiring pest control service provider, by household income, March 2013

### Personal insect repellents concern

Figure 80: Concerns around using personal insect repellents, by household income, March 2013

### Attitudes toward bedbugs

Figure 81: Attitudes toward bedbugs, by region, March 2013

Figure 82: Attitudes toward bedbugs, by parents with children and age, March 2013

### Interest in bedbug offerings

Figure 83: Attitudes toward bedbugs, by any interest in bedbug offerings, March 2013

## Appendix – Trade Associations

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)

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

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)