

Report Price: £3008.96 | \$3995.00 | €3429.31

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



"The pest control products and services market continues to experience steady growth, reaching \$10.6 billion in 2017, a 4% increase from the year prior."
- Rebecca Cullen, Household Care Analyst

This report looks at the following areas:

- Chemical concerns relevant among young adults, parents
- Protecting family, fast-acting highest on long list of priorities

Warming weather trends have stimulated pest activity, driving up the need for pest products to help maintain a pest-free home. Accelerating sales growth beyond this moderate pace may require greater expansion of natural and non-chemical offerings to appeal to younger adults and parents who are most apt to use pest products and services but also have safety and chemical concerns.

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

арас +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: £3008.96 | \$3995.00 | €3429.31

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 market

Pest control products and services market experiences steady growth

Figure 1: Total US sales and fan chart forecast of pest control products and services, at current prices, 2012-22

The issues

Chemical concerns relevant among young adults, parents

Figure 2: Chemical and safety concerns, any agree, by age, parental status, September 2017

Protecting family, fast-acting highest on long list of priorities

Figure 3: Top three label communication priorities, September 2017

The opportunities

Climate change benefits market

Figure 4: Average summer temperatures, contiguous US, June – August, 2012-16

Natural products more attractive among younger adults, parents

Figure 5: Select attitudes regarding pest control and natural products, any agree, among adults aged 18-44 and parents, September 2017

Focus on safety, ingredients on packaging

Figure 6: Attitudes toward safety and performance of pest control products, label communication priorities, September 2017

What it means

The Market – What You Need to Know

Category growth continues upward trajectory

Pest control services growth outpace products

Growing pest populations, expansion of home outdoors benefit market

Warmer weather trends point to future market growth

Market Size and Forecast

Solid growth rates expected to continue

Figure 7: Total US sales and fan chart forecast of pest control products and services, at current prices, 2012-22

Figure 8: Total US retail sales and forecast of pest control products and services, at current prices, 2012-22

Market Breakdown

Pest control services remain foundation for the category

Figure 9: Share of pest control products and services sales, by segment, 2017

Pest control services see stronger gains

Figure 10: Sales of pest control products and services, by segment, at current prices, 2012-17

Figure 11: Total US retail sales of pest control products, by type, at current prices, 2012-17

Market Perspective

BUY THIS REPORT NOW



Report Price: £30	08.96 \$3995	.00 €3429.31
-------------------	----------------	----------------

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

Travel patterns changing due to heightened virus-borne concerns

Booming tick population impacts many markets, including pets

Expansion of home to outdoors heightens importance of products

Pest control benefits from other seasonal categories

Figure 12: Share of seasonal spending, by category, 2017 (est.)

Market Factors

Climate change driving pest population, benefiting market

Figure 13: Average summer temperatures, contiguous US, June – August, 2012-16

Housing market shifts: decline in homeownership

Figure 14: Homeownership rate, by age of householder, 2006-16

Steady disposable household income may benefit pest control services

Figure 15: DPI change from previous period, January 2007-August 2017

Key Players – What You Need to Know

SCJ, Spectrum control market

Private label sees growth, Off! and Raid benefit from familiarity

Multipurpose products experience downturn in sales

Natural products, technology could accelerate growth

Manufacturer Sales of Pest Control and Repellents

Top two competitors market extensive brand portfolios

Sales of pest control and repellents by company

Figure 16: MULO sales of pest control and repellents, by leading companies, rolling 52-weeks 2016 and 2017

What's Working?

Private label reaches cost-driven shoppers

Figure 17: MULO sales of private label pest control and repellents, rolling 52-weeks 2016 and 2017

Figure 18: Share of pest control product launches, by brand type, 2012-17*

Off!, Raid dominate brand usage

Figure 19: Insect repellent brand usage, January 2016 - March 2017

Figure 20: Insecticide brand usage, January 2016 - March 2017

Hot Shot gains across nearly all segments

Figure 21: MULO sales of Hot Shot pest control and repellents, 2016 and 2017

What's Struggling?

Off! Clip-On devices challenged to hang on

Figure 22: MULO sales of Off! Clip-on pest control device, 2013-17

Multipurpose products continue to slide

Figure 23: Total US sales of multipurpose pest control products, 2012-17 (est.)

Figure 24: Attitudes toward specialized vs multi-insect pest control products, September 2017

What's Next?

BUY THIS REPORT NOW



Report Price: £3008.96 | \$3995.00 | €3429.31

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

Fewer or natural ingredients appease conflicted consumers

Figure 25: Share of pest control product and personal insect treatment/repellent launch claims globally, 2013-17*

Controlled application, clear and smart packaging

Greater opportunities to utilize technology in category

The Consumer – What You Need to Know

High incidence of pests, particularly in southern regions

Products used more often to eradicate pests

Safe for family, fast-acting most important pieces of label information

Majority find importance in a pest-free home

Lasting protection outweighs speed

Safety more important among younger adults, parents

Familiar brand trumps cost

Incidence of Pest Issues

Ants, mosquitos most common pests

Figure 26: Incidence of pest issues, September 2017

Parents encounter wider variety of pests

Figure 27: Incidence of pest issues, by parental status, September 2017

Pest issues prevalent in Southern regions, vary by living location

Figure 28: Incidence of select pest issues, by region, living location, September 2017

Pest Control Product and Service Use

Higher incidence of pest control products than services

Figure 29: Any use of insect repellents and insecticides, January 2012 – March 2017

Figure 30: Pest control product and service use, September 2017

Pest control services used for significant pest issues

Figure 31: Pest control product and service use, by incidence of pest issues, September 2017

Pest control products supplement services

Figure 32: Pest control services, by pest control products use, September 2017

Younger adults, parents most engaged in market

Figure 33: Pest control product and service use, by age, parental status, September 2017

Label Communication Priorities

Safety and fast-acting highest on list of priorities

Figure 34: Label communication priorities, September 2017

Safety, speed, and ingredients reach broadest audience

Figure 35: TURF Analysis – Labeling communication priorities, September 2017

TURF Methodology

Label communication pieces vary by product

Figure 36: Label communication priorities, by pest control product use, September 2017

Young adults ingredient-focused, clear labeling appeals to those 55+

BUY THIS REPORT NOW



Report Price: £3008.96 | \$3995.00 | €3429.31

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

Figure 37: Label communication priorities, by age, parental status, September 2017

Pest Control Approach

Pest-free home is a top priority for most...

...yet chemicals are a significant concern

Figure 38: Pest control approach, September 2017

Natural pest products resonate well with young adults, parents

Figure 39: Natural pest control approach, any agree, by age, parental status, September 2017

Attitudes toward Pest Control Products - Speed vs. Lasting Protection

Continued protection is key for most

Figure 40: Attitudes toward pest control product speed vs. long lasting protection, September 2017

25-44s, parents key groups for timesaving claims

Figure 41: Attitudes toward pest control products – speed vs long lasting protection, by age, parental status, September 2017

Attitudes toward Pest Control Products - Safety vs. Performance

Significant portion prioritize safety over performance

Figure 42: Attitudes toward pest control product safety vs. performance, September 2017

Safety prioritized for younger adults, parents

Figure 43: Attitudes toward pest control product safety vs performance, by age, parental status, September 2017

Attitudes toward Pest Control Products - Cost vs. Brand

Brand trumps cost

Figure 44: Attitudes toward pest control product - Cost vs. brand, September 2017

Youngest and oldest adults slightly more price-driven

Figure 45: Attitudes toward pest control products - Brand vs. cost, by age, parental status, September 2017

Appendix – Data Sources and Abbreviations

Data sources Sales data Fan chart forecast Consumer survey data Abbreviations and terms Abbreviations

Appendix – The Market

Figure 46: Total US retail sales and forecast of pest control products and services, at inflation-adjusted prices, 2012-22 Figure 47: Total US retail sales and forecast of pest control products and services, by segment, at current prices, 2012-22 Figure 48: Total US retail sales of pest control products and services, by segment, at current prices, 2015 and 2017 Figure 49: Total US retail sales and forecast of pest control services, at current prices, 2012-22 Figure 50: Total US retail sales and forecast of pest control products, at current prices, 2012-22 Figure 51: Total US retail sales of pest control products, by type, at current prices, 2012-17 Figure 52: Total US retail sales of pest control products, by channel, at current prices, 2012-2017

BUY THIS REPORT NOW



Report Price: £3008.96 | \$3995.00 | €3429.31

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

Figure 53: Total US retail sales of pest control products, by channel, at current prices, 2015 and 2017

Appendix – Key Players

Figure 54: MULO sales of outdoor pest control products, by leading companies and brands, rolling 52 weeks 2016 and 2017

Figure 55: MULO sales of pest control devices, by leading companies and brands, rolling 52 weeks 2016 and 2017

Figure 56: MULO sales of indoor pest control products, by leading companies and brands, rolling 52 weeks 2016 and 2017

Figure 57: MULO sales of mutlipurpose pest control products, by leading companies and brands, rolling 52 weeks 2016 and 2017

Appendix – The Consumer

Figure 58: Repertoire of pest control product use, September 2017 Figure 59: Insecticide formats used, January 2016 – March 2017

BUY THIS REPORT NOW