

# **United States Rodenticides Market By Type (Anticoagulant, Non-anticoagulant), By Mode of Application (Pellet, Spray, Powder), By Rodent Type (Rat, Mice, Chipmunk, Hamster, Others), By End Use (Agricultural Fields, Warehouses, Urban Centers) Region and Competition, Opportunity, and Forecast, 2018-2028**

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## **Abstracts**

United States Rodenticides Market has valued at USD 197.76 million in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 3.67% through 2028. The United States Rodenticides Market is a dynamic and rapidly evolving sector within the larger pest control industry. Rodenticides are chemical substances designed to control and eliminate rodent populations, including rats and mice, which pose significant health and economic risks. This market plays a critical role in safeguarding public health, preventing property damage, and ensuring food safety by curbing the proliferation of disease-carrying rodents.

Several key factors drive the United States Rodenticides Market. Firstly, the increasing urbanization and expansion of residential and commercial spaces have created conducive environments for rodent infestations. As a result, demand for effective rodenticides has risen steadily over the years. Secondly, the stringent regulations and safety standards governing rodenticide use have spurred innovation in the industry, leading to the development of safer and more environmentally friendly products.

The market offers a wide range of rodenticide products, including baits, traps, and poisons, catering to various consumer preferences and specific pest control needs. Traditional rodenticides have given way to more modern and humane alternatives, such

as non-lethal traps and bio-based rodenticides. These developments reflect a growing concern for animal welfare and environmental sustainability.

Furthermore, the United States Rodenticides Market is characterized by a competitive landscape, with several established players and emerging companies vying for market share. The industry is also influenced by trends such as increased adoption of integrated pest management (IPM) practices, which emphasize a holistic and sustainable approach to pest control.

In recent years, the COVID-19 pandemic has brought new challenges and opportunities to the rodenticides market. Lockdowns and disruptions in supply chains have led to an uptick in rodent infestations in various settings, from restaurants and warehouses to residential areas. Consequently, the demand for rodenticides surged during the pandemic, underscoring the market's resilience and adaptability.

## Key Market Drivers

### Urbanization and Expansion of Commercial Spaces

Urbanization and the expansion of commercial spaces have emerged as significant drivers behind the robust growth of the United States Rodenticides Market. As cities continue to expand and urban areas become more densely populated, the prevalence of rodent infestations has risen dramatically. This trend is primarily attributed to the favorable conditions that urban environments offer rodents: access to abundant food sources, shelter in buildings and infrastructure, and ample hiding places. The increased human activity in commercial spaces, such as restaurants, warehouses, and retail establishments, further exacerbates the problem by providing rodents with easy access to food and shelter.

The consequences of rodent infestations in urban and commercial settings are manifold, ranging from health hazards and property damage to economic losses. In response to these challenges, there has been a growing demand for effective rodent control solutions, which has fueled the expansion of the rodenticides market. Urbanization has made rodent infestations a pressing concern for businesses and homeowners alike, necessitating the use of rodenticides to combat these pests.

Furthermore, the expansion of commercial spaces, including the construction of new buildings and infrastructure, has created opportunities for rodents to establish nests and breeding grounds. This expansion has also led to increased competition for available

resources, further driving rodent infestations. As a result, property managers, business owners, and pest control professionals have turned to rodenticides as a crucial tool in their pest management strategies.

To address the unique challenges posed by urbanization and the expansion of commercial spaces, rodenticide manufacturers have developed a range of innovative products and formulations. These products are designed to be effective in urban environments while adhering to stringent safety and regulatory standards.

### Diverse Range of Products

The United States Rodenticides Market is experiencing significant growth, driven in part by the diverse range of products available to consumers and pest control professionals. This diversity in rodenticide products has played a crucial role in meeting the varied needs and preferences of users, thereby boosting the market's expansion.

Rodenticides are not one-size-fits-all solutions, as different rodent infestations require tailored approaches. Manufacturers have responded to this demand by offering a wide array of products, including baits, traps, and poisons. Baits come in various formulations, from blocks to gels, and are designed to attract rodents while delivering a lethal dose of poison. Traps offer non-lethal means of capturing rodents, allowing for their removal and release elsewhere. Poisons, on the other hand, are toxic substances that are either ingested by rodents or applied to areas where they frequent.

This diverse product range enables consumers and professionals to select the most suitable rodenticide for their specific situation. For instance, in sensitive environments like homes with pets or wildlife, non-lethal traps or bio-based rodenticides may be preferred to avoid unintended harm. In contrast, businesses dealing with severe infestations in warehouses or industrial spaces may opt for highly effective lethal baits or poisons to swiftly address the problem.

Furthermore, the availability of diverse products promotes competition among manufacturers, driving innovation and product development within the industry. Manufacturers are continually striving to improve the safety, effectiveness, and environmental sustainability of their rodenticides, leading to the creation of more advanced and environmentally friendly formulations.

This diversity also reflects a broader shift in consumer preferences towards more humane and eco-conscious pest control methods. As awareness of animal welfare and

environmental concerns grows, many consumers are opting for rodenticides that align with their values. Bio-based and non-lethal options are gaining popularity as they offer effective pest control without relying on toxic chemicals.

## Evolving Consumer Preferences

Evolving consumer preferences are playing a pivotal role in boosting the United States Rodenticides Market. Over recent years, there has been a noticeable shift in consumer attitudes towards pest control methods, with a growing emphasis on more humane and eco-conscious approaches. This shift has led to significant changes in the types of rodenticide products that consumers are seeking and using.

Many consumers are now more conscious of the suffering caused by traditional lethal rodenticides and are seeking alternatives that are more humane. Non-lethal traps and repellents have gained popularity as they offer a way to capture and relocate rodents without causing harm. This shift towards humane methods has driven the development and marketing of rodenticides that prioritize the well-being of both target and non-target animals.

Another aspect of evolving preferences is the emphasis on environmental sustainability. Consumers are increasingly aware of the ecological impact of pest control chemicals and are looking for rodenticides that are eco-friendly. Bio-based rodenticides, which are derived from natural sources and biodegradable, are gaining traction. These products minimize the environmental footprint associated with rodent control, aligning with consumer preferences for green and sustainable solutions.

Furthermore, the desire for safer and more user-friendly rodenticide options has led to innovations in product formulations. Manufacturers are developing rodenticides that are easy to apply, less toxic to humans and pets, and have reduced risks of accidental exposure. These improvements address concerns about the safety of using rodenticides in homes and commercial spaces.

The market's response to evolving consumer preferences has been swift, with manufacturers diversifying their product portfolios to include more humane, eco-friendly, and user-safe options. As a result, consumers now have a wider array of choices that cater to their values and specific pest control needs.

## Key Market Challenges

## Regulatory Hurdles

The United States Rodenticides Market, despite its critical role in pest control and public health protection, faces significant challenges stemming from a complex and stringent regulatory landscape. These regulatory hurdles, while designed to ensure safety and environmental responsibility, can impede the growth and innovation of the market.

The Environmental Protection Agency (EPA) plays a central role in regulating rodenticides and other pesticide products in the United States. The primary goal of these regulations is to mitigate the potential risks posed by rodenticides to non-target species, wildlife, pets, and the environment. While this regulatory oversight is essential for public safety and environmental protection, it introduces several challenges for the industry.

Compliance with EPA regulations demands substantial resources, both in terms of time and finances. Manufacturers must invest in rigorous testing, data collection, and analysis to meet the stringent safety and efficacy standards required for product approval. Navigating the regulatory process can be time-consuming and costly, especially for smaller manufacturers with limited resources.

Furthermore, the regulatory landscape for rodenticides is constantly evolving. New research findings or emerging concerns may lead to changes in regulations, requiring manufacturers to adapt their products to remain compliant. This dynamic environment can pose challenges in terms of product development, market planning, and maintaining a competitive edge.

## Resistance and Tolerance

The United States Rodenticides Market plays a critical role in managing rodent infestations, but it grapples with a persistent challenge - the development of resistance and tolerance in rodent populations. These biological adaptations hinder the effectiveness of rodenticides and pose a significant obstacle to pest control efforts.

Resistance, in the context of rodenticides, refers to the ability of certain rodent populations to inherit genetic traits that make them less susceptible to the toxic effects of these chemicals. Rodents that exhibit resistance can survive exposure to lethal doses of rodenticides that would typically eliminate them. This survival trait is often passed down to future generations, resulting in a growing population of rodents that are resistant to the rodenticide's active ingredients.

Tolerance, on the other hand, is a phenomenon where rodents, after prior exposure to sublethal doses of rodenticides, become more resistant to the toxic effects. This acquired tolerance can make it increasingly challenging to control rodent populations using traditional rodenticides, as rodents can withstand higher doses without succumbing to the poison.

The development of resistance and tolerance diminishes the effectiveness of rodenticides, as they may no longer be lethal to the target rodent populations. This necessitates the use of larger quantities of rodenticides or the development of new formulations with different active ingredients, both of which can increase costs for pest control professionals and consumers.

## Key Market Trends

### Consumer Preferences for Humane and Sustainable Solutions

Consumer preferences for humane and sustainable solutions have emerged as a powerful driver of growth in the United States Rodenticides Market. In recent years, there has been a notable shift in the way consumers approach pest control, with a growing emphasis on ethical and environmentally friendly methods. This shift has significantly influenced the rodenticides market, leading to the development and adoption of alternative, more responsible products.

One of the primary aspects of evolving consumer preferences is the increasing concern for animal welfare. Traditional rodenticides, which often involve the use of lethal toxins, have come under scrutiny due to the suffering they cause to target rodents and non-target species. This ethical concern has driven the demand for more humane alternatives. Non-lethal traps, for example, provide a way to capture rodents without causing harm, allowing for their safe relocation away from human dwellings.

Environmental sustainability is another key consideration for today's consumers. Many people are now acutely aware of the ecological impact of pest control chemicals and are seeking rodenticides that are eco-friendly. This shift in mindset has led to the development of bio-based rodenticides, which are derived from natural sources and biodegradable, reducing their environmental footprint. These sustainable alternatives resonate with consumers who prioritize responsible environmental practices.

Furthermore, consumers are increasingly making choices based on the overall safety of



their households and the welfare of their pets. Accidental exposure to toxic rodenticides can pose health risks to both humans and animals, leading consumers to seek safer solutions. Manufacturers have responded by creating rodenticides with lower toxicity profiles, safer handling instructions, and improved packaging to prevent accidental ingestion.

### Integrated Pest Management (IPM) Practices

Integrated Pest Management (IPM) practices have emerged as a significant driver of growth in the United States Rodenticides Market. IPM represents a holistic and sustainable approach to pest control that emphasizes prevention, monitoring, and the selective use of pest control methods, including rodenticides, only when necessary. This approach aligns with both the evolving regulatory environment and the changing preferences of consumers seeking more responsible pest management solutions.

By identifying and addressing the root causes of rodent problems, such as food sources or entry points, IPM reduces the reliance on chemical interventions like rodenticides. This approach not only aligns with the desire for more eco-friendly and humane pest control but also reduces the overall use of rodenticides.

Monitoring is another essential component of IPM. Regular surveillance allows pest control professionals to identify pest populations and assess the need for intervention. By utilizing non-lethal methods like traps or tracking devices, IPM practitioners can accurately gauge the extent of infestations and tailor their response accordingly. This targeted approach minimizes the unnecessary use of rodenticides, preserving their efficacy and reducing the risk of non-target exposure.

When rodenticides are deemed necessary within an IPM program, their application is precise and strategic. IPM practices promote the use of the least toxic and most environmentally friendly formulations available. Pest control professionals are trained to apply rodenticides in a manner that minimizes risks to non-target species, pets, and the environment. This responsible use of rodenticides resonates with consumers who value ethical and sustainable pest control methods.

The adoption of IPM practices has also driven innovation within the rodenticides market. Manufacturers are developing products that are specifically designed to be compatible with IPM strategies. These rodenticides are formulated to meet the stringent safety and environmental standards associated with responsible pest control practices.

## Segmental Insights

### Mode of Application Insights

Based on the Mode of Application, pellets emerged as the dominant segment in the United States market for United States Rodenticides Market in 2022. Pellets are easy to handle and apply, making them a preferred choice for both professionals and homeowners. They do not require complex equipment or specialized training for application, making them accessible to a wide range of users.

Pellets provide a high degree of control over the placement of the rodenticide. This precision is crucial for effective rodent control, as it allows users to target specific areas where rodents are active, minimizing the risk of unintended exposure to non-target species.

### End Use Insights

Based on the End Use, the Urea segment emerged as the dominant player in the United States market for United States Rodenticides Market in 2022. The United States boasts extensive agricultural lands, with crops ranging from grains to fruits and vegetables. These large-scale agricultural operations provide abundant food sources for rodents, making them prone to rodent infestations. As a result, rodenticides are frequently used in these settings to protect valuable crops.

Many agricultural products and practices are subject to strict regulatory standards, including the control of pests and rodents. Compliance with these regulations often necessitates the use of rodenticides to meet quality and safety requirements, driving demand in the agricultural sector.

### Regional Insights

Mid-West emerged as the dominant player in the United States Rodenticides Market in 2022, holding the largest market share. The Midwest experiences distinct seasons, including cold winters, which can drive rodents to seek shelter in barns, grain storage facilities, and other agricultural structures. This migration of rodents during seasonal changes increases the likelihood of infestations and, subsequently, the demand for rodenticides.

Rodent damage to crops and stored grains can result in substantial economic losses for



farmers and agribusinesses. As a result, there is a strong economic incentive to employ effective rodent control measures, leading to the consistent demand for rodenticides. The Midwest cultivates a diverse range of crops, each with unique pest challenges. Rodent species like rats and mice are generalist feeders, capable of damaging a variety of crops, from corn to soybeans. This diversity in crop cultivation contributes to the demand for rodenticides that can effectively target these rodents across different agricultural settings.

## Key Market Players

BASF SE

Bayer AG

Rentokil Initial PLC

Neogen Corporation

Bell Laboratories Inc.

Liphatech Inc

Impex Europa

Syngenta AG

PelGar International

JT Eaton

## Report Scope:

In this report, the United States Rodenticides Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

### United States Rodenticides Market, By Type:

Anticoagulant

Non-anticoagulant

United States Rodenticides Market, By Mode of Application:

Pellet

Spray

Powder

United States Rodenticides Market, By Rodent Type:

Rat

Mice

Chipmunk

Hamster

Others

United States Rodenticides Market, By End Use:

Agricultural Fields

Warehouses

Urban Centers

United States Rodenticides Market, By Region:

North-East

Mid-west

West

## South

### Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the United States Rodenticides Market.

### Available Customizations:

United States Rodenticides Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

### Company Information

Detailed analysis and profiling of additional market players (up to five).

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