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## STATE OF THE SEGMENT — **TERMITE** MANAGEMENT

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## Word From Our Sponsor

# Better Together: A Snapshot of CSI + ADAMA

By Marie Knox, CSI

**B**etter Together is a common and constant theme here at Control Solutions Inc. (CSI), based in Pasadena, Texas. We've recently launched our Combination Chemistry™ product development platform with the addition of both FUSE™ Termiticide/Insecticide as well as Tekko™Pro Dual IGR Concentrate. Products developed based on this platform have a strong focus on multiple active ingredients with differing modes of action formulated into a single, unique product. Already, there's been a lot of buzz surrounding these two product launches in 2014. In addition to exciting new product launches, we also supported our partner, ADAMA in the transition from MAI to the new name and company, ADAMA. "Adama" means soil, or earth in Hebrew and we find it a fitting symbol for a concept we believe in wholeheartedly: From fertile ground grows endless possibilities.

At CSI, "Better Together" also conveys our strong belief in partnerships. Our ultimate goal is to be the best possible partner for our suppliers and customers. We believe in the partnerships we have with our Distributors as well as our partnerships with our Customers and we strive to strengthen them every day. One way we do this is to consistently check in with our customers to make sure what we are developing truly fits the desires or needs they have. Feedback from our customers fuels our daily endeavors.

### Global Reach, Local Focus

Fresh off of a June visit to our global headquarters in Israel, our Development Team has returned with a wealth of information, ideas and excitement for the future of CSI's project pipeline. It was truly a collaborative week spent sharing concepts and ideas that have the capacity for significant

**CSI's partner ADAMA is a true innovator that holds dozens of patents for active ingredients.**

positive global impact. Our partnership with ADAMA has afforded us endless possibilities, especially in the realm of new and innovative product



development. Personally, I enjoyed my time in Israel immensely and am grateful for the opportunity to visit such a beautiful place.

Our future is indeed bright here at CSI, and that is something we are grateful for on a daily basis.

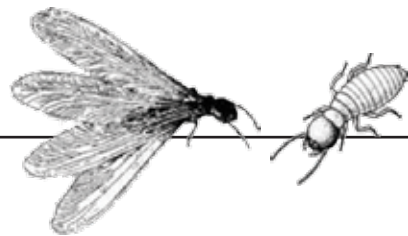
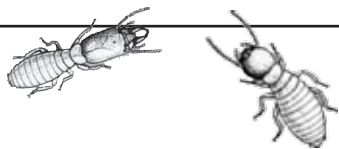
We have a strong and dedicated team, and are excited for the possibilities the rest of 2014 holds for us and our valued distribution and end-user partners. However, we refuse to rest on what we've already accomplished. We are excitedly looking toward the future and are hard at work developing new and innovative Combination Chemistry™-driven products for launch in 2015 and beyond. Our product development philosophy at CSI focuses on looking beyond basic product development toward innovative new active ingredient combination possibilities and we believe this truly is the future of products for the industries we serve.

If you're already a CSI partner, thank you, we really do appreciate you! If you're just now looking into how we can serve you, welcome to the family and we look forward to growing *Better Together*.

✦ Marie Knox is PCO Technical Manager, Product Development, Control Solutions, Inc. She can be reached at [mknex@controlsolutionsinc.com](mailto:mknex@controlsolutionsinc.com)



**CSI's product development team recently spent a week in Israel, brainstorming with ADAMA on the endless possibilities for innovation, including CSI's recently launched Combination Chemistry product platform.**



# STATE OF THE SEGMENT — **TERMITE** MANAGEMENT

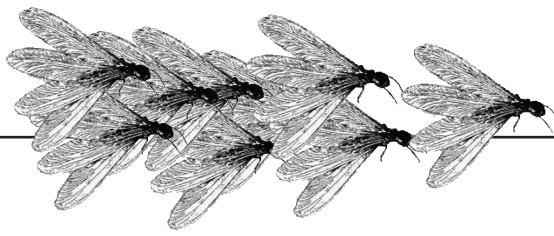
## **PMPs SHARE INSIGHTS ON TERMITE MANAGEMENT TRENDS AND CONTROL TIPS**

by PMP  
Staff

Photo courtesy of, and copyrighted by, Gene White, [pmimages@earthlink.net](mailto:pmimages@earthlink.net)



Termites cause an estimated \$5 billion in property damage a year, according to the National Pest Management Association (NPMA). With many home and commercial-building markets recovering — for new construction as well as the sale of existing structures — we asked pest management professionals (PMPs) throughout the country to share how they're cashing in on this trend.



**M**ost PMPs have experienced an uptick in termite management work over the past few years. As real estate markets rebound so, too, is the termite management segment. Meanwhile, through the Internet, customers are better informed (and sometimes misinformed) about termites and the damage they cause. Both of those scenarios require technicians to serve as termite management experts and educators.

With the economic downturn behind the industry, many PMPs express optimism for the industry in general and termite work in particular.

“Despite a poor economy and swarming seasons, our termite work has grown steadily during the past several years,” says Bobby Townsend,



**Bobby Townsend**

general manager of Atlantic in Charleston, S.C. “The economy continues to show signs of improvement, and we’ve experienced solid job growth in South Carolina that’s driving a strong real estate sales market and new home starts. These factors should create opportunities.”

Fred Markowich, owner of Guardian Pest Control in Plainville, Conn., concurs, citing two aspects of termite work: real estate and nature.

“The swarms seem to be picking up during the past few years, but none of the professors (at the local extension office) could tell us, for certain, why,” Markowich says. “Business also has been growing the past couple years.”

Increases could be a result of additional advertising and more frequent termite swarms. The real estate market recovery also plays a role. “When you’re conducting home inspections, you’re doing termite work,” Markowich says.

Payne Pest Management started doing business in the midst of the economic downturn on May 15, 2006. The company’s termite work has increased in each of its eight years in business. As homes and structures age, termite infestations increase, says Jason Payne, chief operations officer of the San



**Fred Markowich**



**Jason Payne**

Diego-based company.

“In Southern California, most people understand the destruction termites cause and the need to stop them,” Payne says.

Ed Martin’s customers understand the destruction potential of termites, too.

“People in our market are unusual because of the area’s heavy infestation,” says Martin, company entomologist for Terminix in greater New Orleans. “Everybody here knows somebody who spent \$25,000 fixing a house ravaged by termites. Homeowners are in dire need of termite protection. Any place you have a fairly heavy subterranean infestation, people are going to know somebody who got hurt.”

The subterranean termite belt runs from Texas to New York, and New Orleans is in the center.

“We have the largest infestation of subterranean termites in North America,” Martin says. “We keep building houses out of dead wood. The more houses we have, the more termite work we have.”



**Ed Martin**

### Consumer smarts

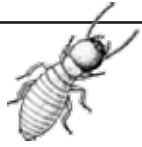
Whether homeowners notice a rebound in termite swarms or they’re simply accessing information on the Internet, PMPs now deal with savvier customers.

“They realize some do-it-yourself treatments are gimmicks, while others ensure 100-percent eradication,” Payne says. “We’re dealing with much more knowledgeable consumers than we were 10 years ago.”

Educated customers require a more sophisticated sales pitch. As a result, Atlantic spent a lot of time and money to improve its website.

“Realizing how much time the consumer spends researching termite treatment options, we need to showcase our termite management expertise on our website,” Townsend says. “Participation in social media also is critical. However, the best way to sell termite work is to sell value.”

As customers become more educated, it’s crucial technicians keep up.



“Continuing education is a huge part of termite work,” says Alan Wilson, technical director and staff entomologist at Clark’s Termite & Pest Control in Irmo, S.C.



**Alan Wilson**

But just because consumers have access to a vast amount of information on the Internet, doesn’t mean it’s useful. In some cases, it’s detrimental.

“Even though consumers are more knowledgeable, they’re still far from being experts,” Payne says. “So

instead of solely educating them, we must correct them sometimes in the ways they think, and teach them facts vs. fiction. Everything they read on the Internet isn’t necessarily true.”

### Overcoming challenges

Despite the improving economy and increasing termites swarms in some areas, PMPs are still dealing with the difficulty of keeping and recruiting skilled workforces.

“We have to be willing to pay top wages and offer reasonable benefits if we expect to keep solid employees,” says Townsend, adding that he also expects greater scrutiny in the regulatory arena. “More regulation is just a stone’s throw away. It will

require constant training and retraining to ensure we are putting the best possible workforce in the field.”

But it’s not just increased regulation that can create a difficult environment for PMPs. The lack of scientific data and amount of misinformation among consumers, and ill-informed decision-making from legislators, also complicates matters. In Charleston, where Clark’s Termite & Pest Control operates, Formosan termites are a considerable challenge. For quality assurance, the company ensures technicians perform proper annual renewal inspections by requiring them to take photos that document the presence or absence of wood-infesting insects, fungi and moisture problems.

Architectural variations in New Orleans, which is almost 300 years old, pose challenges for termite-fighting companies.

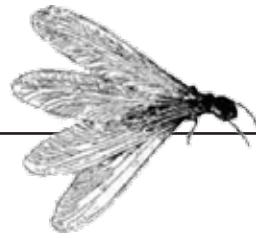
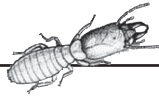
“We have to construct a complete barrier between the building and ground,” Martin says. “In New Orleans, there are 100-year-old buildings on brick foundations, basements or floating slabs. We could have foundation walls that extend five or six feet.”

Even when PMPs create a complete barrier between structures and the ground, their efforts often are thwarted by customers who inadvertently build bridges over treatment areas — decks, room additions and brick piles, for example. Others take the treated dirt and replace it with new soil.



Termite technicians need to be part inspector, part educator and all professional.

Photo courtesy of Terminix



There's really one way to deal with termites, Martin says: "Your mindset must be to treat inch by inch, not foot by foot. An inch is an opening for termites. Do we fail? Sure we do. But it is a small percentage of the time. In 50 years, we've made all the mistakes, so we've corrected them."

Wilson and Markowich emphasize following procedures — to train and document. Monitoring work is key, too.

"On every job, you must make sure there are no hazards; you constantly supervise," Markowich says.

**Avoiding mistakes**

According to Townsend, when PMPs make mistakes with termite treatments, they generally fall into three areas: selling their work too cheap, not taking the time to do it right, and failing to find the infestation source. Too often, companies don't offer termite contracts that cover future damage — nor do they have quality-control programs.

"Some companies don't have detailed termite management guidelines," Martin says. "Procedures must be written. If you follow the guidelines and open your mind when the glove might not fit perfectly, you're going to be OK."

Another mistake companies make is not taking the time to find and hire the best people.

"You're more likely to hire the first person

you meet with than you are to conduct 10 or 15 interviews," Markowich says. "A lot of people know they're making less than the best hiring decisions, but the moves seem quicker and easier in the short term. Taking your time will save you money, headaches and clients in the long run."

When the economy is good and pests are on the move, any sales team can look good. But too often, Payne has seen a company's sales force lack aggressiveness. It's a problem when salespeople sit around the office, waiting for the phone to ring.

**Smart business**

Termites aren't always easy to control and exclude. For those new to the market segment or those interested in entering it, Townsend suggests taking time to do the job right the first time."

"Be an investigator," he says. "Hunt them down, and don't stop until you've found them. If you don't, you might be writing a check later."

Markowich says referrals are a must. "Unless you have a strong base, you can't compete with the bigger guys," he says. "It's difficult to appear in the upper levels of a Google search. As long as I've been doing this, 75 percent of my business is through referrals."

Martin advises to be ready for interesting but difficult work: "You must have the correct

*Continued on page TM10*

*Photo courtesy of Terminix*



Training should be ongoing, as a refresher course and to learn new techniques.

*Photo courtesy of Terminix*



Allot the time necessary for your techs to do a thorough inspection and treatment the first time to avoid callbacks.

# A Trusted Solution Against Termite Infestations

**Hydrex Pest Control's five branches wield an effective weapon for the war on wood-destroying pests.**

A customer was extremely frustrated he wasn't getting results. Termites continued to gnaw away at his home, and the service company he had been working with was unable to control the pests.

"We came in and used CSI's Taurus SC, and it fixed the problem," says Dave Watkins, general manager of Hydrex Pest Control West Coast, a five-branch Hydrex franchise based in Long Beach, Calif.

After reading the label and understanding it worked the same way as other fipronil products, Hydrex decided to try it with residential pest control treatments. That was two years ago, and the company hasn't looked back. Control Solutions Inc.'s (CSI's) Taurus SC has become Hydrex's go-to product for treating termites and other infestations.

Taurus SC is a water-based suspension concentrate of 9.1 percent fipronil for pre- and post-construction termite applications. Labeled for barrier applications targeting occasional invaders around structures, Taurus SC also controls ants, beetles, spiders and ticks.

"If we do the application properly outside a customer's home, it's going to take care of the problem," Watkins says.

Solving a pest problem the first time is particularly important because termite infestations are slowly heading back toward pre-recession numbers, Watkins says.

"A callback is costly," he adds. "If you use a product that will solve these problems, it will save money in the long run. The economy hit us hard, and termite work took a dramatic hit. It's taken us a few years to rebound from that. It's starting to turn, but we're not back to the numbers we were doing from 2003 to 2006. Thank goodness we had our pest control division to carry us through."

Hydrex decided to aggressively pursue the recovering real estate market, which is a shift from the prerecession approach in which most of the termite work came from non-termite pest management customers. It's not that the company never worked with real estate agents, but for the past year or so, Hydrex has made it a key growth driver.

"We hired a manager specifically to build our relationships with Realtors," Watkins says, noting Mitch Mashburn had experience with that business segment. "Mitch is going after that business for us now and substantially increased our business doing that."

A proactive approach to real estate and an effective tool make for a profitable one-two punch.

"Taurus SC has worked extremely well for our company," Watkins says. "We won't use a product that's not going to give us the results we expect."

Taurus SC solved termite problems and helped Hydrex up-sell customers that might have other pest problems.

"Our termite inspectors look at both existing and potential pest problems," Watkins says. "There might be some areas that need to be sealed, or there might be a problem with ants or black widow spiders. Our termite inspectors take the initiative to promote our pest control division."

Whatever the problems Hydrex customers have, Watkins knows CSI's solutions and staff will help.

"CSI has the products and people we need to tackle almost any pest problem," Watkins says, adding he's known his CSI sales representative, Rob Ives, for years. "I know we can rely on Rob whenever he assists or advises. It's a feeling of absolute assurance — a trust that's been well earned over the years."



**Dave Watkins,**  
general manager,  
Hydrex Pest Control  
West Coast

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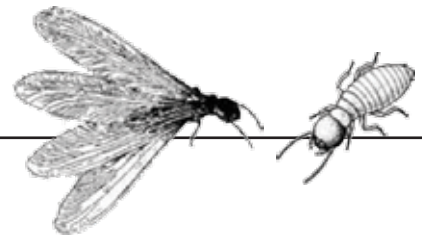
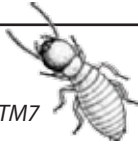
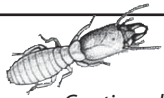
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Continued from page TM7

mindset. You have to be extremely thorough to do termite work.”

For Payne, generating termite work is a matter of being creative and uncovering it.

“Don’t think like everyone else; think outside the box,” he says.

### Encouraging news

Whatever termite management challenges PMPs face, most are optimistic. Townsend expects homeowners will continue to understand the value of termite treatments. And as the real estate market rebounds, so, too, will PMPs’ termite management.

Markowich agrees, adding, “Hopefully the swarms will increase.”

“As the population grows, homes age and the economy recovers, I see opportunities continuing to expand in the termite segment and general pest control,” Payne adds.

Companies need to be prepared for the additional work when it comes, Townsend says.

“Having a well-trained, professional-looking sales force is a must,” he says. “The individual you send to meet with a customer must be well versed in what he’s talking about. He has to have a neat-and-clean appearance and be able to deliver pest solutions quickly. The customer of tomorrow is going to be more demanding.”

For Wilson, the key to Clark’s growth is adapting

to the market and changing as needs change.

Similarly, Guardian works with real estate agents and home inspectors who can help boost business.

“When real estate is doing well, we conduct 10 to 15 termite inspections a day,” Markowich says. “Keeping real estate agents happy fuels our business. We’re careful to nurture that referral network.”

### Bright future

Even though predicting the future is difficult, the aforementioned PMPs explain where they think the industry will be in years to come.

“We’ll have new construction materials,” Townsend says. “Every technician in the field will be working with a mobile device that will be able to deliver better and more timely information to the consumer.”

No matter how good the industry becomes at controlling termites, nature will still win the battle, and there will be other colonies to replace, Martin says.

Speaking for many PMPs, Townsend says termite work can be the most fascinating sector of the industry.

“While you can learn to perform a termite treatment in a short period of time, learning about the pests themselves is a lifelong process,” Townsend says.

“Termite management is part art, part science, part education and part experience.”

“Everybody here knows somebody who spent \$25,000 fixing a house ravaged by termites. Homeowners are in dire need of termite protection.”

— Ed Martin, company entomologist  
for Terminix in greater New Orleans



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# A LOOK INSIDE THE BUSINESS OF TERMITES

A RECOVERING REAL ESTATE MARKET AND AN IMPROVING ECONOMY  
LEAVE PMPs OPTIMISTIC ABOUT THE FUTURE OF TERMITE WORK.

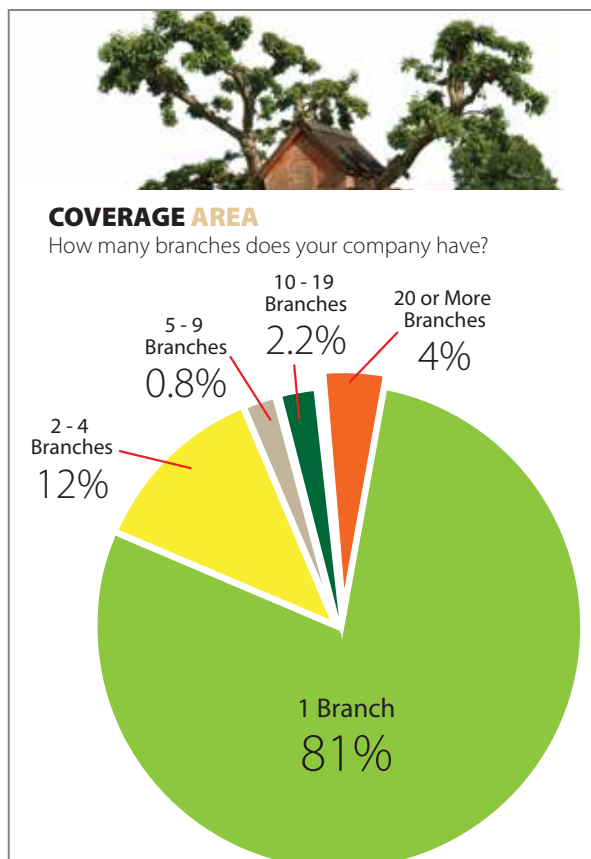
**T**he economy is rebounding. Termites are swarming. Pest management professionals (PMPs) are becoming technical experts and savvy business professionals.

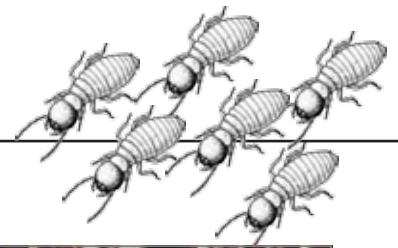
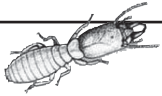
Numerous variables contribute to the ebb and flow of termite work, and the ebb of the recent economic downturn seems to have finally given way to a steadily increasing flow of business. The increasing optimism of many termite management professionals is reflected in their responses to *Pest Management Professional's (PMP's) 2014 Termite Management Survey*.

This year's survey drew 135 responses. About four-fifths of respondents indicated they have only one office. Twelve percent have between two and four branches, and the remaining 7 percent have five or more branches. In terms of termite service technicians, 79 percent of respondents indicated they have four or fewer. Twelve percent of termite companies have between five and 19 termite technicians. The remaining 9 percent have 20 or more termite service technicians.

When asked about the opportunities for maintaining and growing their termite revenue, the three highest-ranking responses were:

- the economy that is recovering;





- existing real estate sales are rebounding; and
- new construction is making a comeback.

With the economy rebounding, PMPs are looking to fill their coffers with additional revenue in 2014. Forty-four percent of those who replied to the survey indicated they generated less than \$250,000 in revenue. About 27 percent earned between \$250,000 and \$1 million. More than 20 percent earned between \$1 million and \$10 million in revenue. The final 8 percent earned more than \$10 million last year.

PMPs are excited about the possibilities that increased termite swarms in some areas present. More work means more revenue, and several PMPs expect to generate more revenue from termite work in 2014 and beyond.

Six in 10 indicated their 2013 termite management revenue was more than \$50,000. Two-thirds predict an increase in termite management revenue this year. One in five pest management companies will make \$500,000 or more managing termites this year. Two-thirds of those will generate \$1 million or more from the segment.



**TURNING TERMITES INTO CASH**

What was your termite management revenue in 2013, and what is your projection for 2014?

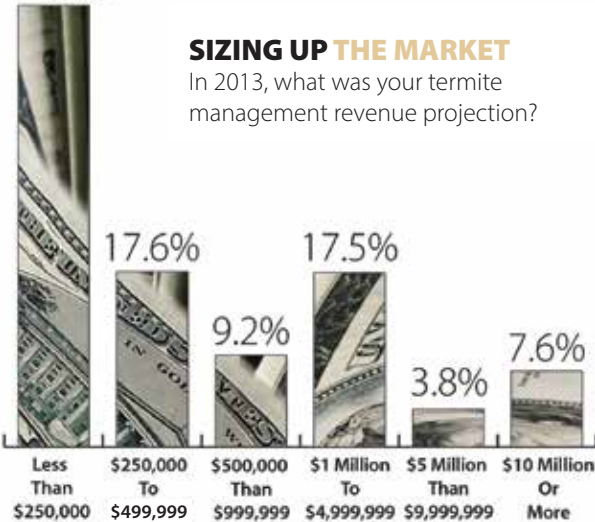
	2013	2014 <i>*projected</i>
Less than \$50,000	44.2%	33.2%
\$50,000 to \$99,999	22.1%	33.3%
\$100,000 to \$249,999	7.6%	7.6%
\$250,000 to \$499,999	7.5%	6.7%
\$500,000 to \$999,999	6.1%	6%
\$1 million to \$2,499 million	4.5%	4.5%
\$2.5 million to \$4.99 million	2.2%	3%
\$5 million or more	5.8%	5.7%



44.3%

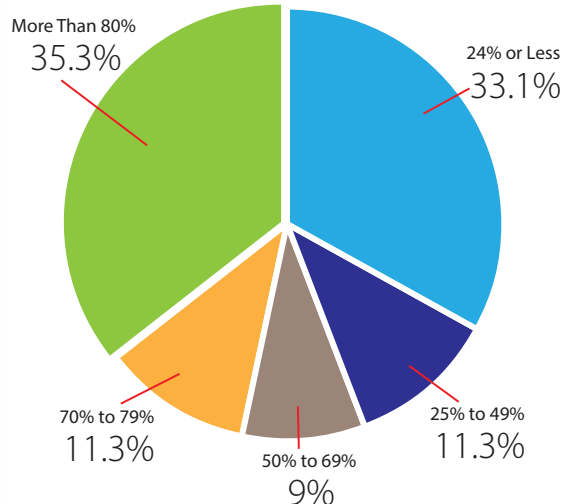
**SIZING UP THE MARKET**

In 2013, what was your termite management revenue projection?



**HOME INVASION**

What percent of your company's 2013 termite management revenue stemmed from existing residential structures?





### No place like home

Most of the surveyed PMPs say that the bulk of their termite management revenue comes from residential work. In 2013, 54.6 percent indicated at least half of their termite management revenue came from existing residential structures. The figure is similar to 2012, when 54 percent of respondents indicated half their termite management revenue came from existing residential structures. Similarly, in 2013, only 5.3 percent of PMPs indicated that 25 percent or more of their termite management revenue was from existing commercial structures (53.4 percent said less than 4 percent of their termite management revenue comes from existing commercial structures).

The health of the housing market has a significant impact on the entire pest management industry, and termite work is no different. While the housing market has yet to return to its pre-recession glory days, there has been a noticeable rebound of new-home construction, which translates into more inspections.

Housing and commercial building are on the rise, and many areas have experienced an increase in swarms. More than one-third (37 percent) of PMPs indicated 15 percent or more of their new termite work was triggered by swarms. When termites swarm, they're not picky about what type of structures they attack — existing homes, new homes, existing commercial structures and new commercial structures all can be vulnerable.

During the down economy, there wasn't a great deal of residential or commercial new construction happening. With the rebound in construction, PMPs have seen revenue generated from new structures.

**24%**

of PMPs say new-home building generated 5% or more of their 2013 termite management revenue.

### The swarm factor

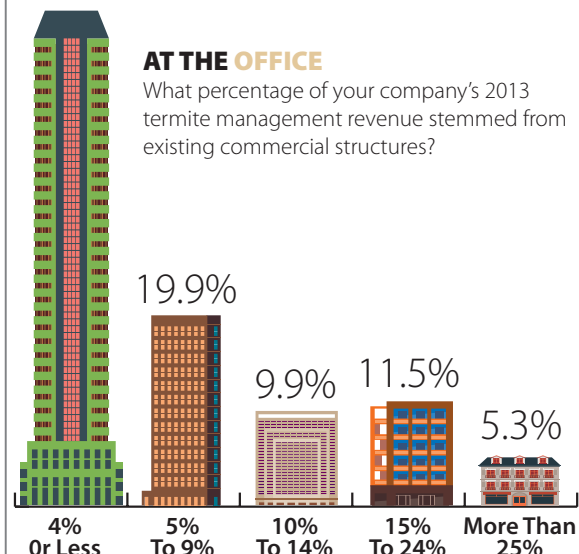
The wet spring season in many areas of the country led to conditions conducive to termite swarms. Last year, a lack of



53.4%

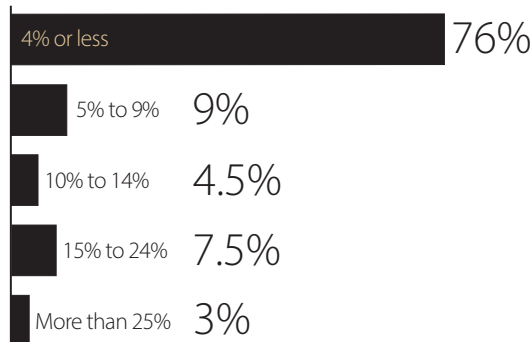
#### AT THE OFFICE

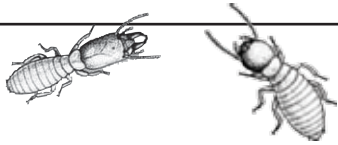
What percentage of your company's 2013 termite management revenue stemmed from existing commercial structures?



#### NEW HOME BUSINESS

What percent of your company's 2013 termite revenue stemmed from new home building?





termite swarms ranked as the No. 2 termite management obstacle, behind only the not-fully-recovered economy. Difficulty finding and retaining qualified termite technicians rounded out the three biggest concerns. This year's top obstacle is termite tech recruitment and retention.

Usually when the phone rings, it's good news — a new customer or business opportunity. Every so often, it's an unhappy customer — the dreaded callback. When a customer complains, the

response often requires sending a technician back to the job site, which costs time and money.

**10.6%**

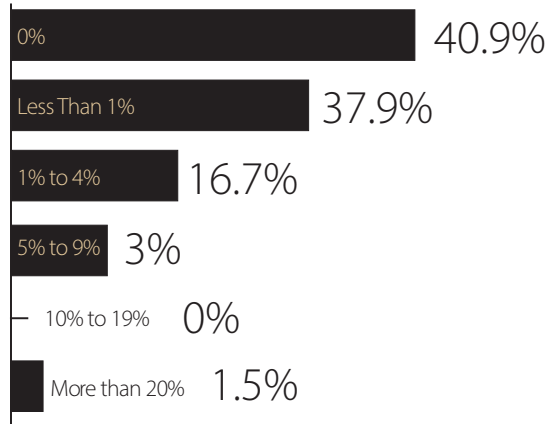
of PMPs say commercial construction generated 5% or more of their 2013 termite management revenue.

**Pricing trends**  
It's a law of nature. The cost of doing business increases with time. Sometimes pest management companies can pass



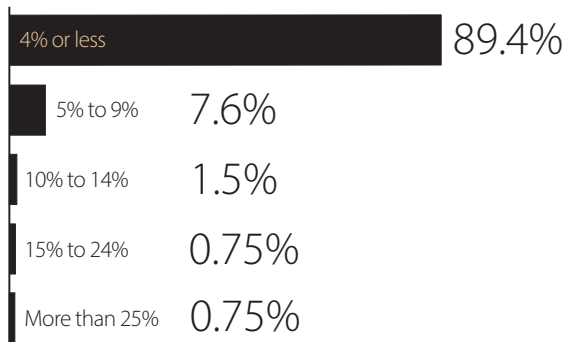
**CALLBACKS**

What was your company's callback percentage in 2013 on new termite treatments?



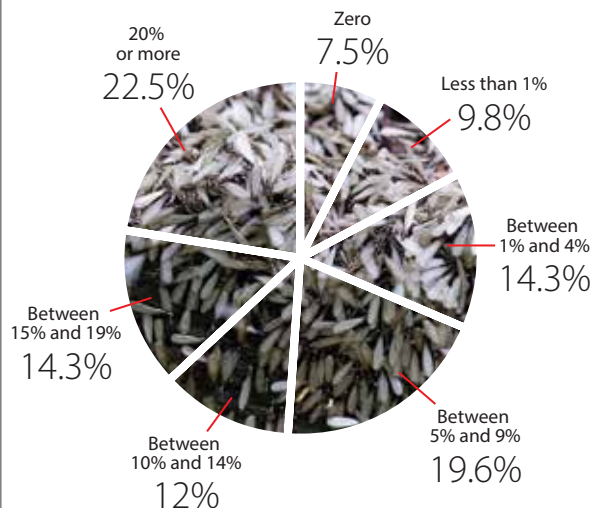
**COMMERCIAL CONSTRUCTION**

What percent of your company's 2013 termite management revenue stemmed from new commercial construction?



**SWARM TRENDS**

What percent of your company's new termite jobs landed in 2013 were triggered in part by swarms?





along those costs. When gas prices spiked a couple of years ago, many companies tacked on fuel surcharges with varying success. But fuel is just one cost of doing business. As the cost rises, the good news is more and more PMPs are charging more for termite inspections and treatments. Management companies have two choices: decrease their margins or increase their prices.

**The issues at hand**

According to the 2013 Termite Survey, PMPs indicated a sluggish overall economy was their biggest concern. A year later, that was the least of their concerns. This year, the quality of labor is the most worrisome issue for business owners. That was last year's least worrisome issue. When the economy is down and termite work follows suit, executives don't need as many employees. In some cases, they even laid off workers. As the economy rebounds and work picks up once more, however, those same executives look for experienced workers to take on the increased workload.

**TOP OBSTACLES**

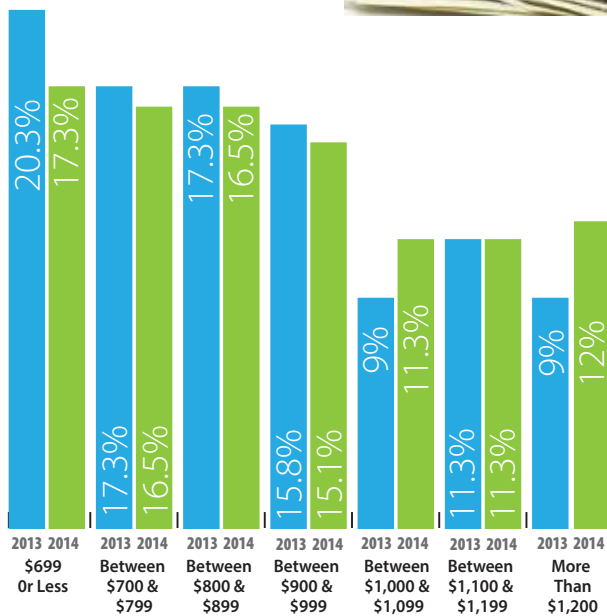
Please rank from 1-6 the top obstacles to maintaining and growing termite management revenue (#1 being the biggest obstacle and #6 being the smallest). In other words, the higher the number, the lower concern.



Ranking	2013	2014
Sluggish Overall Economy	5.2	2.6
Lack of Termite Swarms	4.9	2.9
Sluggish Home Sales Market	4.6	3.5
Fierce Pricing Competition	4.2	3.9
Sluggish New-Construction Market	3.4	4.4
Difficulty Finding/Keeping Qualified Termite Technicians	3.2	5.9

**COST OF DOING BUSINESS**

What was your company's average initial termite inspection and treatment price in 2013, and what do you expect it will be in 2014?



**ANNUAL TERMITE RENEWALS**

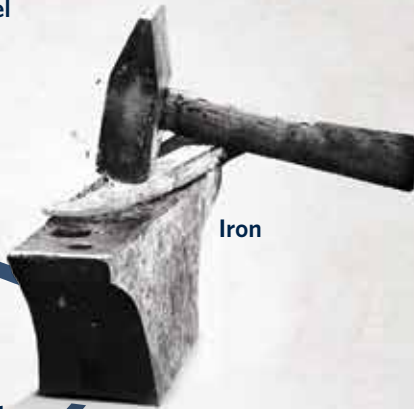
What was your average termite renewal inspection and service fee in 2013? What about 2014?

	2013	2014
\$99 or Less	22%	16.8%
Between \$100 to \$149	34%	35.1%
Between \$150 to \$199	19.7%	21.4%
Between \$200 to \$249	9.1%	12.2%
Between \$250 to \$299	6.1%	4.6%
Between \$300 to \$350	6.1%	6.1%
More Than \$350	3%	3.8%

# The Evolution of Innovation



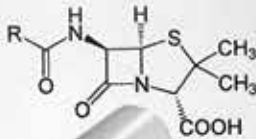
The Wheel



Iron



The Light Bulb



Penicillin



The Computer



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