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PMP's 2019 State of the Industry

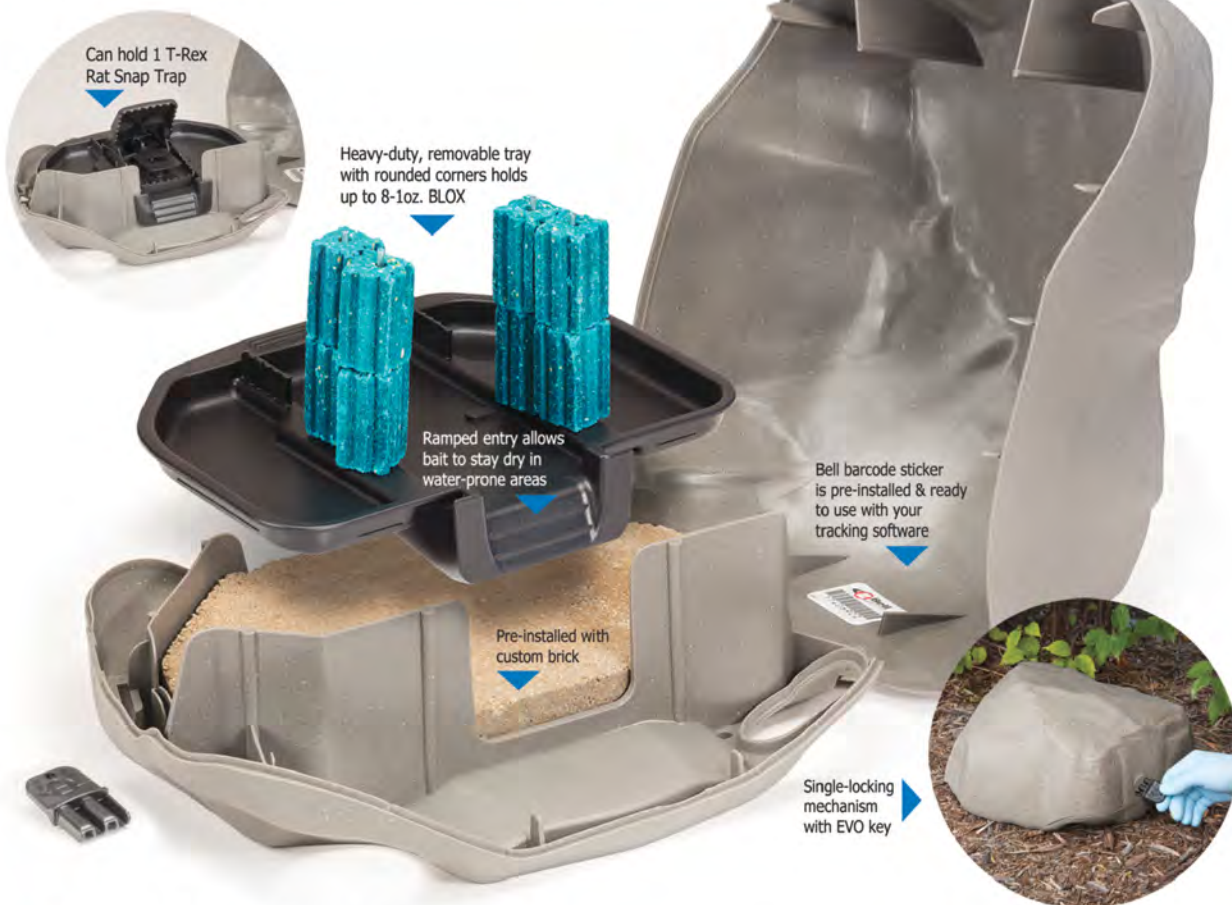
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BY STEVE LEVY
President & CEO
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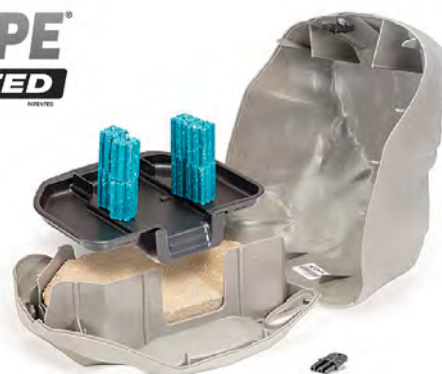
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Bell's Bait Blox (above left), bait stations (directly below) and soft bait (bottom left) are just a few of the company's rodent control solutions.

Most would agree that to achieve continued business success, it is important to surround yourself with partners who understand your business and provide tools that help you achieve sustained success. At Bell, we strive to be that partner, and continuously look for value-add solutions.

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(PMPs), the more successful they ultimately will be — and the more valuable that partnership becomes.

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Soon, Bell expects to help PMPs become more knowledgeable experts about the accounts they service. We are developing products using sensing technology that will enable PMPs to quickly and easily gather robust, actionable information in the palms of their hands. This, in turn, will dramatically improve their success and increase their productivity at rodent control accounts. Stay tuned: These tools are right around the corner.

We hope you have had a prosperous 2018. As you look forward to 2019, rest assured that at Bell, *We've Got Your Back*.

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BECOME A PMP KINGPIN

2019 State of the Industry survey: PMPs are on a roll.

By Diane Sofranec | Senior Editor



Pest management professionals (PMPs) are at the top of their game this year, and it appears the winning streak will continue through next year.

An overwhelming majority of the 159 PMPs who answered our 2019 State of the Industry survey say they are looking forward to another great year.

When asked to rate on a scale of one to five stars how well the pest management industry will perform next year, 88 percent chose four or five stars.

It's no wonder PMPs give high marks to the pest management industry. More than three-fourths of PMPs expect revenue and profits will be up in the year ahead. Ants, cockroaches, termites, bed bugs and rodents remain top revenue generators for the majority

of PMPs who responded to our survey. Respondents also project high customer and employee retention rates, key indicators of a good year ahead.

"We actually expect *every* year to be a banner year,"



Del Lawson

says Del Lawson, vice president, Modern Pest Control, Katy, Texas. "With the knowledge we gather each year, we improve our processes and our people. That gives us an edge that allows us to feel as though every month will be our 'best one ever.'"

Modern Pest Control has been in business 66 years, and it is known as an early adopter of technology and add-on services. But because pest control is the company's focus, the services it adds are complementary.

"A lot of pest control companies became water damage and mold experts in our area after Hurricane Harvey last year," Lawson says. "But we know our focus is pest control, and work to expand upon that. New services will have an impact on revenue, but likely will not be a driving force."

PESTS ON THE RISE

Mother Nature plays a role in PMPs' financial performances.

Business is good for Bob Maurais, president of Mainely Ticks Franchise Development Inc.

in Windham, Maine, due to a pest problem that appears to be on the rise: ticks. From 2015 through 2018, he says Mainely Ticks has averaged a 15-percent increase in overall revenue.

"We see continued growth commensurate with the threat of future tick encounters," Maurais explains.

No wonder business for the 14-year-old company is good.

According to Maurais, in the continental United States, 95 percent of vector-borne diseases reported in 2016 were tick-related. But with ticks, education is just as important as eradication, he says.

"As infected ticks expand geographically, the threat to human and companion-animal health intensifies, as must our efforts to educate and service entire communities," he says. "Our job is not to simply treat to protect one's property; our job is to teach to better protect one's community."



Bob Maurais

STEADY GROWTH

A strong demand for bed bug management services, as well as newly added tick and mosquito management services, are expected to lead to double-digit growth in 2019 for Paul Alley, ACE, president of Pestmaster

INSIDE

S6-7 Top pest species

S10-11 Service offerings

S12 Planned purchases

S13 Revenue and profit projections

S14 Employee and customer issues

S15 Obstacles and opportunities

Services of the Hudson Valley in Kingston, N.Y.

“As a member of the Pestmaster franchise network for more than 18 years, I have experienced double-digit growth the majority of those years, and 2018 is no exception,” he says. “Currently, we are trending 16 percent higher than 2017’s year-to-date growth rate.”

Lawson says that a goal of 9 percent revenue growth is about right for his company, and is an indicator of a good year. Growth



Paul Alley

happens organically, but it has to be controlled.

“When revenue goals are set too high, some companies lower their margins to meet those goals,” he says. “Although that isn’t always bad, it can become a destabilizing force in the business and industry. By growing steadily in revenue, but maintaining our margins, we will be able to weather any hiccups that may occur.”

Read on to learn more about PMPs’ expectations for 2019.

2019 OUTLOOK



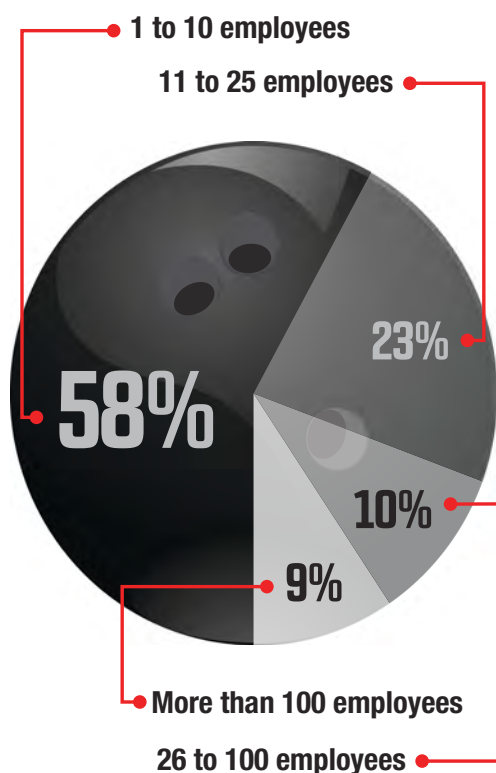
On the following pages, our exclusive 2019 State of the Industry supplement, sponsored by Bell Laboratories, includes *PMP’s* benchmarking data, infographics and analyses that highlight key pest management industry trends and projections. *PMP*

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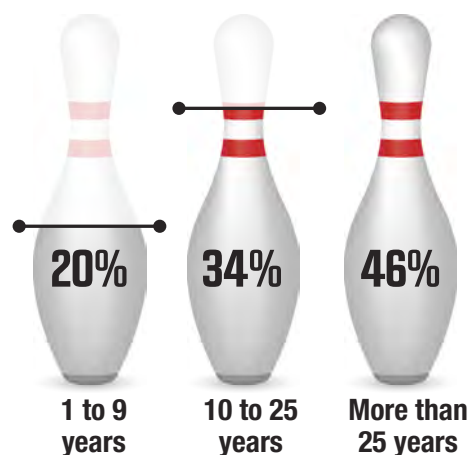
PMPs WHO SHARE THEIR STORIES

This summer, 159 pest management professionals (PMPs) — primarily company owners and presidents — completed our 30-question State of the Industry survey. Here is some background on their companies:

NUMBER OF EMPLOYEES



YEARS IN BUSINESS



FLEET SIZE

1 to 10 vehicles	69%
11 to 25 vehicles	17%
26 to 100 vehicles	9%
More than 100 vehicles	5%



SETTING 'EM UP, KNOCKING 'EM DOWN

Our exclusive *PMP* State of the Industry report finds carpenter ants are still the champs among top-volume pests. **By Heather Gooch** | *PMP* Editor

Among the “Big 5” money-making pests in this industry — including rodents, cockroaches, bed bugs, ants and wood-destroying insects and organisms (WDI/WDO) — it’s interesting to note that carpenter ants top our 2019 *PMP* State of the Industry survey’s species revenue rankings for ant *and* WDI/WDO.

But Bill Hoffman, ACE, president of Hoffman’s Exterminating Co. in Mantua, N.J., represents the majority of respondents when he notes termites are still one of his most profitable pests, both in preventive and corrective treatments. (Eastern subterranean termites were the WDO champs in our 2017 species breakdown.)

“Termite services really let you talk to the customer, and bundle with other services, too,” Hoffman points out. “Corrective treatment has gone down significantly in recent years, but we’ve kept busy with preventive treatments — not only for new

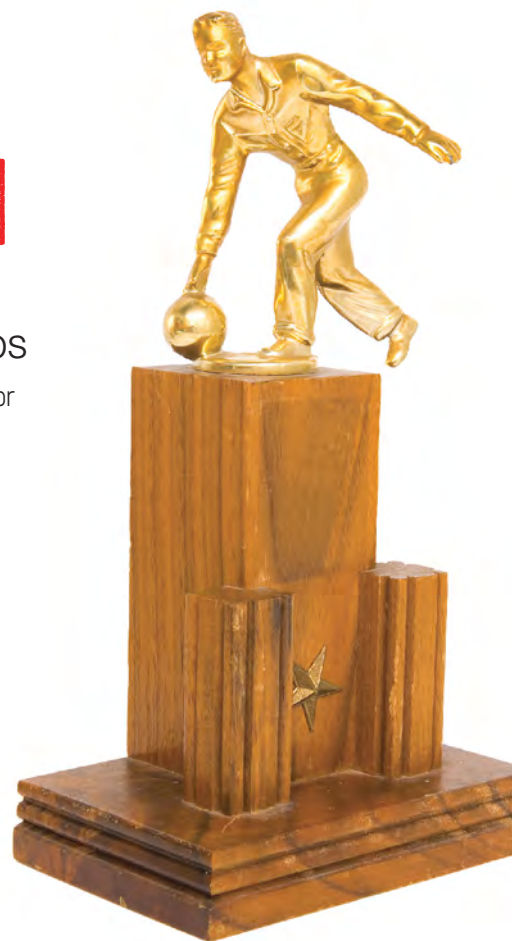
construction, but also for homes in the 10- to 20-year range that hadn’t previously addressed termite risks.”

Wally Melendez, owner of A&R Pest Solutions, notes subterranean termites are a rare sight in his Vancouver, Wash.-based market, with dampwood termites being much more prevalent, followed by powderpost beetles.

“In seven years of living in Washington, I have only found one colony of subterranean termites — in my townhouse complex, just a couple weeks ago,” Melendez reports. “The only reason the customer knew she had termites was because they swarmed in her bedroom. I opened the wall and saw the mud tubes and termites in the wood. Subterraneans are a stone’s throw away from us in Oregon, but the water content in the soil here, thanks to the Columbia River, isn’t as hospitable to the pests. We’re still trying to figure how they got here.”

ANTS EVERYWHERE

Because Nevadians tend to view their back yards as a year-round extension of their living spaces, Russ Hedland notes that he tends to get more calls for “anthills in



my back yard” than for “ants in my kitchen.”

“Argentine ants are our No. 1 pest ant species by far,” says Hedland, president of Las Vegas Pest Control, Henderson, Nev., “but harvester ants, even though they’re more of an outdoor pest, are No. 2 for us. Around here, people are outdoors all the time.”

Farther West, Melendez reports the most prevalent ant species in his Vancouver, Wash., market are odorous house ants. The most profitable, though, are carpenter ants.

“My price for carpenter ant jobs is a fraction of that of much of our competition,” he says. “I’m not lowballing, but with



Bill Hoffman

just one full-time and a couple part-time technicians, I have less overhead and can charge less. I also have had zero callbacks on carpenter ants, which helps our margins.”

For 2019 *PMP* State of the Industry respondents overall, bed bugs are still a booming business. Hedland says bed bugs are still being found in a range of accounts, including multi-family and single-family residential. Melendez, however, says bed bugs comprise a smaller piece of his firm’s revenue pie — primarily commercial hospitality accounts.

RODENTS & COCKROACHES

Hedland realizes his most prevalent — and profitable — pest species aren’t aligned with the rest of the country, thanks to the arid climate of the Vegas Valley. For example, he deals most frequently with Oriental and Turkestan cockroach species, especially in single-family residential structures.

“In Vegas, rather than wooden fences separating homes, we have hollow cinder block walls,” Hedland explains.

“These retain moisture and keep a constant temperature,

providing ideal harborage. The Oriental cockroaches enter homes directly from these walls. Neighbors share these walls, so multiple homes can be affected at once.”

These same hollow walls also create what Hedland calls

a “superhighway” for roof rats. Add the fact that the common stucco facades on residences help rats climb from ground to wall to attic, and it’s easy to see why rodent control and exclusion is a big part of his business.

“I got into business 24 years ago, and if you would have told me then that there would be rats in someone’s back yard, I wouldn’t have believed you,” he says. “But now, roof rats are abundant in southern Nevada. Just last week, we pulled out 46 roof rats in a strip mall. They were feeding in the nearby dumpsters.”

Hedland chalks up the increase to more population density in the market, with not only more sanitation issues but more landscaping materials being used that attract rats and cockroaches.

In many parts of the country, ticks are becoming more prevalent than ever. Not all PMPs provide tick management services, but for those who do, it’s quickly becoming a lucrative segment of the business.

While the Top 5 haven’t budged, spiders quite literally are on the climb: Just like last year, spiders rank No. 6 among respondents’ top revenue- and profit-generating pests; and outrank bed bugs and WDI/WDO for services offered. As the housing market continues to regain its stride and more habitats are disturbed, it might not be long before spiders crawl into our Top 5. PMP

You can reach GOOCH at hgooch@northcoastmedia.net or 330-321-9754.

TOP 5 REVENUE-GENERATING SPECIES

RODENTS

1. House mice (*Mus musculus*)
2. Norway rats (*Rattus norvegicus*)
3. Roof rats (*R. rattus*)
4. Moles (Talpidae)
5. Voles (Cricetidae)

ANTS

1. Carpenter (*Camponotus* spp.)
2. Pavement (*Tetramorium caespitum*)
3. Odorous house (*Tapinoma sessile*)
4. Argentine (*Linepithema humile*)
5. Fire (*Solenopsis* spp.)

COCKROACHES

1. German (*Blattella germanica*)
2. American (*Periplaneta americana*)
3. Oriental (*Blatta orientalis*)
4. Brown-banded (*Supella longipalpa*)
5. Smoky brown (*P. fuliginosa*)

TERMITES & OTHER WDI/WDO

1. Carpenter ants (*Camponotus* spp.)
2. Eastern subterranean termites (*Reticulitermes flavipes*)
3. Carpenter bees (*Xylocopa* spp.)
4. True powderpost beetles (Bostrichidae)
5. Wood-decay fungi



Russ Hedland

A



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STRIKING WHILE THE MARKET'S HOT

Nearly 40 percent of respondents to our exclusive 2019 *PMP* State of the Industry survey plan to expand service offerings next year.

By Heather Gooch | *PMP* Editor

Once again, ants top the charts for the pest management service that generates the most revenue and profits, pest management professionals (PMPs) surveyed say. But maintaining the status quo isn't good enough for some PMPs.

While the majority of respondents report they are sticking with their current service offerings next year, 39 percent plan to add one or more services. Answers varied widely, but mosquito management was the most-popular add-on service — named by 11 percent of those who say they are expanding services.

Jeffery Preece, BCE, technical director of ZipZap Termite & Pest Control, Pleasant Valley, Mo., predicts that adding mosquito treatment and radon testing services in the coming year will help strengthen his company's ties to existing customers, especially those who aren't on regular service schedules already.

"We're marketing these services as a way to increase the value of being on a pest control program with our company," Preece says.



Jeffery Preece

Bill Hoffman, ACE, is president of Hoffman's Exterminating Co., Mantua, N.J. His company just started offering mosquito control, and he is focusing on green mosquito applications because so many of his customers are homeowners with swimming pools.

"We cross-trained our existing technicians for mosquito work, and the outdoor service led to an interest from customers wanting turf and ornamental service," he explains. "So we're getting cross-licensed in turf and ornamental, too."

The foray into green solutions for mosquitoes, Hoffman adds, is opening possibilities for green residential work as a general pest control option, as well.

"We're looking at marketing green pest control services to our existing database of both former and current customers," he says.

DEFENDING THEIR TURF

Turf and ornamental, lawn care and tree insect management comprised about 10 percent of responses among those planning to expand their offerings.

Russ Hedland, president of Las Vegas Pest Control in Henderson, Nev., is introducing turf and ornamental services. In the desert, it's common to encounter xeriscapes, a landscaping style that requires

little or no irrigation or other maintenance. A plant staple for xeriscapes is the aloe yucca (*Yucca aloifolia*, also known as the dagger plant or Spanish bayonet) — which is very susceptible to weevils.

“To replace a full-grown aloe yucca can cost \$500, or even \$1,000,” Hedland points out. “So we had a lot of customers asking if there was anything we could do to save their plants.”

MEETING CUSTOMER DEMAND

In response to this increasingly frequent request, this year several Las Vegas Pest Control technicians were cross-trained and licensed in turf and ornamental (T&O) services. In addition to being able to set up appointments with customers who already know their plants are in trouble, the cross-trained techs also are able to recognize diseases on plants at accounts during general pest control inspections, and address it with customers.

“Right now, we’re only marketing T&O services to our existing customer base as we ramp up,” Hedland explains. “It’s more cost-effective than replacing the plants, and it’s building more loyalty with customers.”



Wally Melendez run a lawn care and ornamental services route in Florida, and decided to get back into it for his Vancouver, Wash., pest control company.

Melendez notes his company, which just celebrated four years of business, will “soft open” its T&O service with current customers only, and down the road make it widely available to attract new customers for T&O and general pest control.

“The No. 1 question we were getting was ‘Will you treat my shrubs?’” he says. “I decided to get licensed in T&O applications this fall, so we can finally say ‘yes.’ This will help us build loyalty and revenue, as well as diversify.” PMP

You can reach GOOCH at hgooch@northcoastmedianet or 330-321-9754.

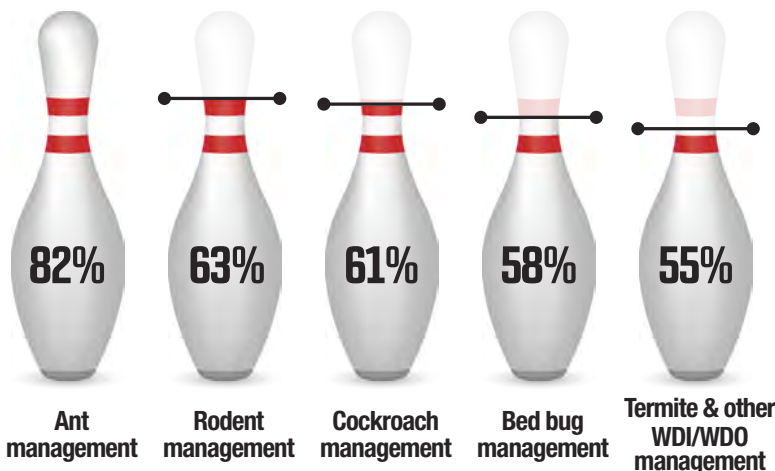
CURRENT SERVICES

Ant management	94%
Cockroach management	91%
Rodent management	91%
Spider management	90%
Flea & tick management	87%

TOP PROFIT-GENERATING SERVICES

Ant management	63%
Termite & other WDI/WDO management	58%
Bed bug management	57%
Rodent management	53%
Cockroach management	51%

TOP REVENUE-GENERATING SERVICES





AIMING FOR GROWTH

Benchmark your planned 2019 purchases with your peers.

By Heather Gooch | *PMP* Editor

You know 2019 will be a good year when 78 percent of our annual *PMP* State of the Industry respondents predict their budgets will be up. That falls in line with the 91 percent who predict revenue and profit increases in 2019.

The Top 5 planned purchases for 2019 — insecticides, bait stations, backpack sprayers, trucks and traps — are followed by dusters, monitors, vehicle accessories, bait guns and applicators, and spray guns and nozzles. It's no surprise that these traditional pest management tools rank high on our list. But items that are relatively new to the industry — green products, business software, and GPS systems and software — also are on many PMPs' shopping lists.

Ralph Citarella Jr., BCE, president of Bayonne Exterminating in Bayonne, N.J., says it's important to regularly re-evaluate the effectiveness of products and services.

"PMPs can't just do a route optimization once every 10 years and expect it to work," he adds. "If I get on the system and see three of my trucks parked within a half-mile of one another, I look at what we need to consolidate."

Citarella also says PMPs must consider feedback from their "feet on the street" — their employees.

"If one of our technicians passes another technician on the road, he's encouraged to bring it up to the dispatch team: 'Hey, I can cover his afternoon accounts and let him stay in this neighborhood,'" he offers as an example. *PMP*

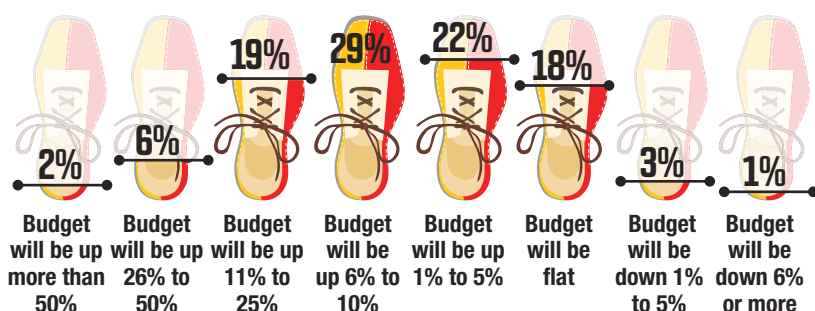
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2019 PLANNED PURCHASES

Insecticides	79%
Bait stations	75%
Backpack sprayers	63%
Trucks	61%
Traps	60%
Dusters	55%
Monitors	55%
Vehicle accessories	53%
Bait guns & applicators	49%
Spray guns	49%
Spray nozzles	48%
Spray pumps	40%
Granule spreaders	41%
Green products	39%
Spray hoses	39%
Compressed air sprayers	37%
Aerosol applicators	33%
Hose reels	30%
Spray rigs	28%
Business software	26%
Foggers	26%
Foam machines	18%
Bird & animal repellents	16%
GPS systems & software	14%
Trailers	12%

PROJECTED EQUIPMENT & MATERIALS BUDGET

2019 vs. 2018



HAVING REVENUE TO 'SPARE'

Our exclusive *PMP* State of the Industry survey reveals what helps carry revenue and profit to a win. **By Heather Gooch** | *PMP* Editor

According to respondents of our 2019 State of the Industry survey, the majority of the pest control industry is having a solid, profitable year. But how do we keep the momentum going?

"I think the industry has to really rethink how we're going to keep fueling the lower-ranked positions we have, especially technicians," says Bill Hoffman, ACE, president of Hoffman's Exterminating Co., Mantua, N.J. "How are we attracting people, and what are they looking for?"

Hoffman says the answer lies in keeping up with new technologies, such as rodent sensors and handheld units, partly so younger people don't think of pest control as an antiquated trade.

"Many kids are being steered to college, without exploring other job paths," he explains. "And that's great, but too many are graduating with a lot of debt and no job prospects."

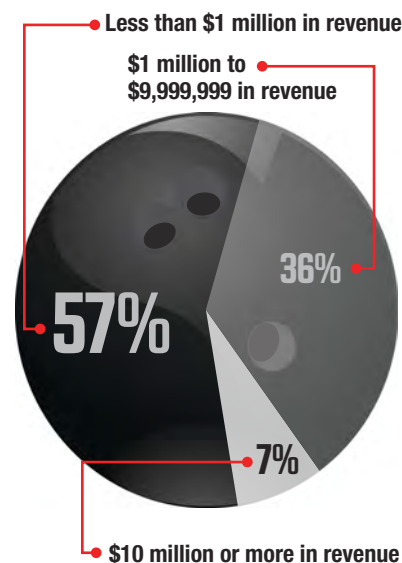
Hoffman says about six of his twenty-something technicians came to him because there were no jobs in their fields. He's not worried about pest control being just a stopgap job, because he presents it to them as a career opportunity.

"I think pest control is an industry many fall into by accident — it happened to me," he says.

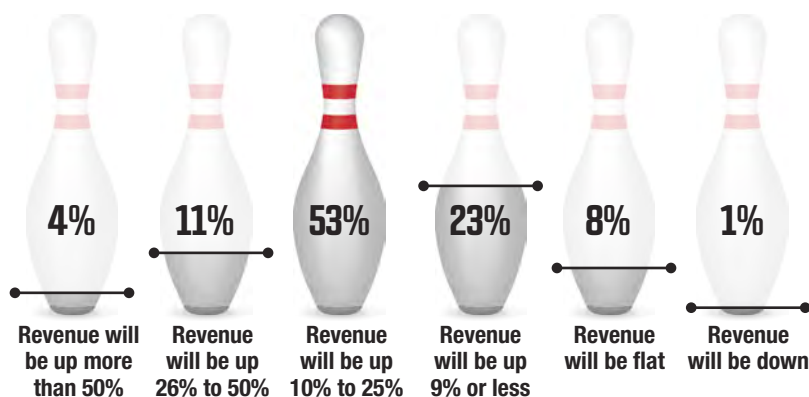
"But if we keep them for a year or two, they tend to stay. The first year can be tough, but once they're confident in their jobs, they're hooked." *PMP*

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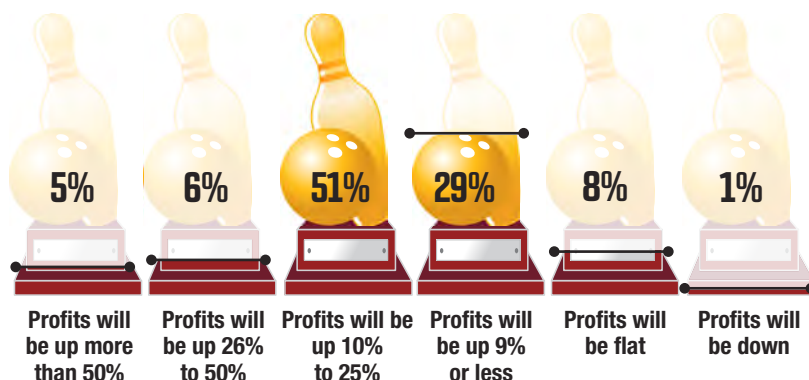
PROJECTED 2019 REVENUE



PROJECTED REVENUE CHANGE 2019 vs. 2018



PROJECTED NET PROFITS CHANGE 2019 vs. 2018





THE RIGHT APPROACH

PMPs who retain customers and employees gain a competitive advantage.

By Diane Sofranec | PMP Senior Editor

Pest management professionals (PMPs) are on the right track when it comes to retaining customers and employees.

Practically all of the responding the PMPs — 99 percent — say they annually retain 70 percent or more of their customers. Their employee retention rate almost is as high, as 94 percent say 70 percent or more of their workers stay put annually.

That's important from a business standpoint, because it costs far less to retain customers and employees than it does to acquire new ones. PMPs with companies that have high retention rates can allocate the funds they would have needed

for advertising, marketing, sales, and training on new equipment, quality products, additional training, competitive salaries and bonuses instead.

ATTRACTING NEW TALENT

Natura Pest Control in Vancouver, Wash., uses door-to-door sales representatives to bring in new customers. Revenue growth is tied

to the quantity — and more importantly, the quality — of its sales reps, says President Jake Claus.

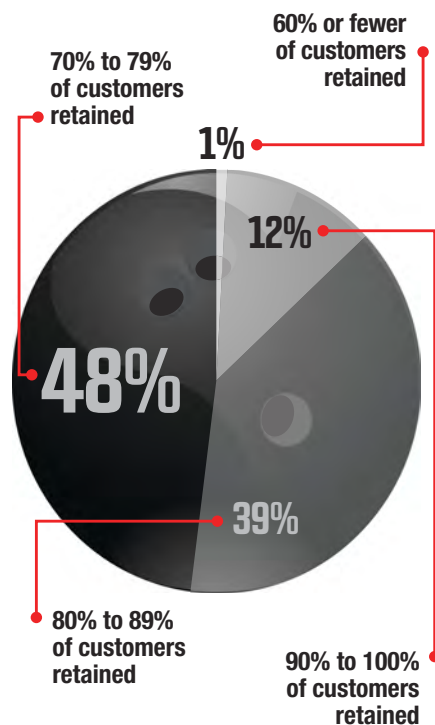


Jake Claus

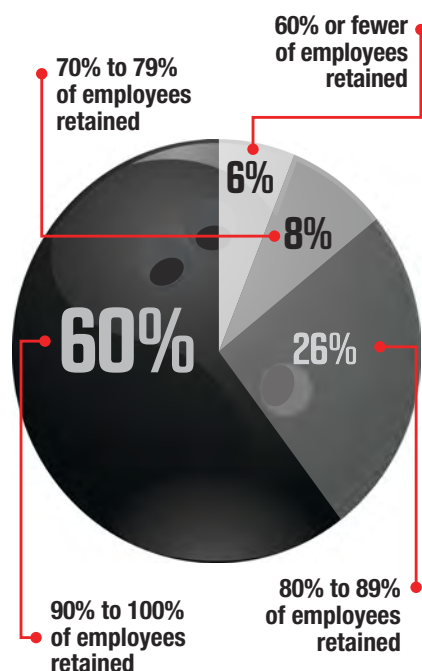
“For us, 2019 will be a pivotal year, as we implement new growth strategies and focus on bringing in the right sales people and making use of the talent that already exists in our organization,” he says. PMP

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PROJECTED 2019 CUSTOMER RETENTION

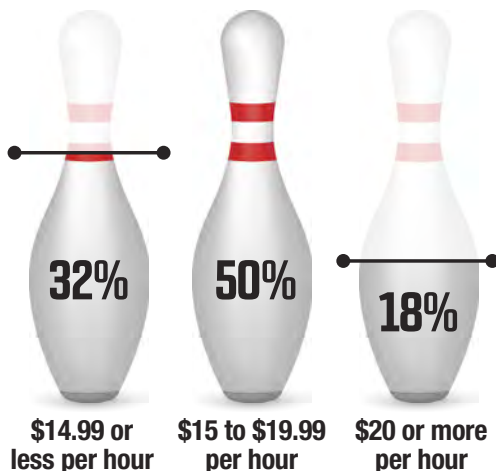


PROJECTED 2019 EMPLOYEE RETENTION



PROJECTED 2019 COMPENSATION FOR HOURLY POSITIONS

Residential Pest Control





LOOKING OUT FOR THE TEAM

Our exclusive *PMP* State of the Industry report finds businesses are taking care of their own so they can better take care of customers. **By Heather Gooch** | *PMP* Editor

While the 2019 *Pest Management Professional (PMP)* State of the Industry survey finds that increasing referrals, repeat business and customer retention are still the top opportunities, the top industry challenges have changed a little from last year. Lowballing competitors is still the biggest thorn in our collective sides, it seems, but health insurance has dropped from No. 2 to No. 4.

Like an increasing number of PMPs, Jeffery Preece, BCE, technical director of ZipZap Termite & Pest Control, Pleasant Valley, Mo., seems to have found a solution to insurance woes: Seek professional guidance.

"Health insurance is a large expense that continues to rise annually," he points out. "But we work with our broker to stay informed about options."

Ralph Citarella Jr., BCE, president of Bayonne Exterminating, Bayonne, N.J., refuses to "sacrifice the health of my co-workers for profitability." Despite its increasing costs, Citarella says he feels strongly that health coverage is important for his team.

"I have guys driving trucks in areas where traffic accidents are a problem. Not everyone's 23 years old, but they're walking up stairs and doing a lot of physical work," he adds. "What kind of company would I be to *not* offer healthcare?"

Bayonne Exterminating picks up 50 percent of the deductible for its employees. Citarella notes that in return, the company has reaped the benefits of fewer sick days and low employee turnover.

KEEPING CUSTOMERS

Preece notes that ZipZap is actively working on customer retention by using email marketing and, in the case of termite bait customers, performing more frequent "integrity checks" of the bait stations while customers are home.

"This is so they can see our technicians' faces," Preece explains. "It helps build a positive relationship, showing our customers we care. We're also contacting customers via phone to make sure they are happy with our services, and if they have any concerns we can address."

To increase referrals from existing customers, Bayonne Exterminating offers a \$25 incentive — with a twist. "It's not \$25 off their next service, but an actual check from me for \$25,"

Citarella says. "It's the same \$25 for me, but the perception to the customer is a lot more."



Ralph Citarella Jr.

Despite everyday challenges, Preece says, it's a great time to be in the business of pest control.

"We have great leadership in our industry, improving the tools and knowledge necessary to help every PMP out there succeed," he adds. "I consider our industry to be made up of people who are 'first responders' to the health of our country. We combat pest invaders in our food facilities and restaurants that have the potential of carrying and spreading disease. But without smart people, the proper tools and the latest in technology, we will fall behind in our efforts." *PMP*

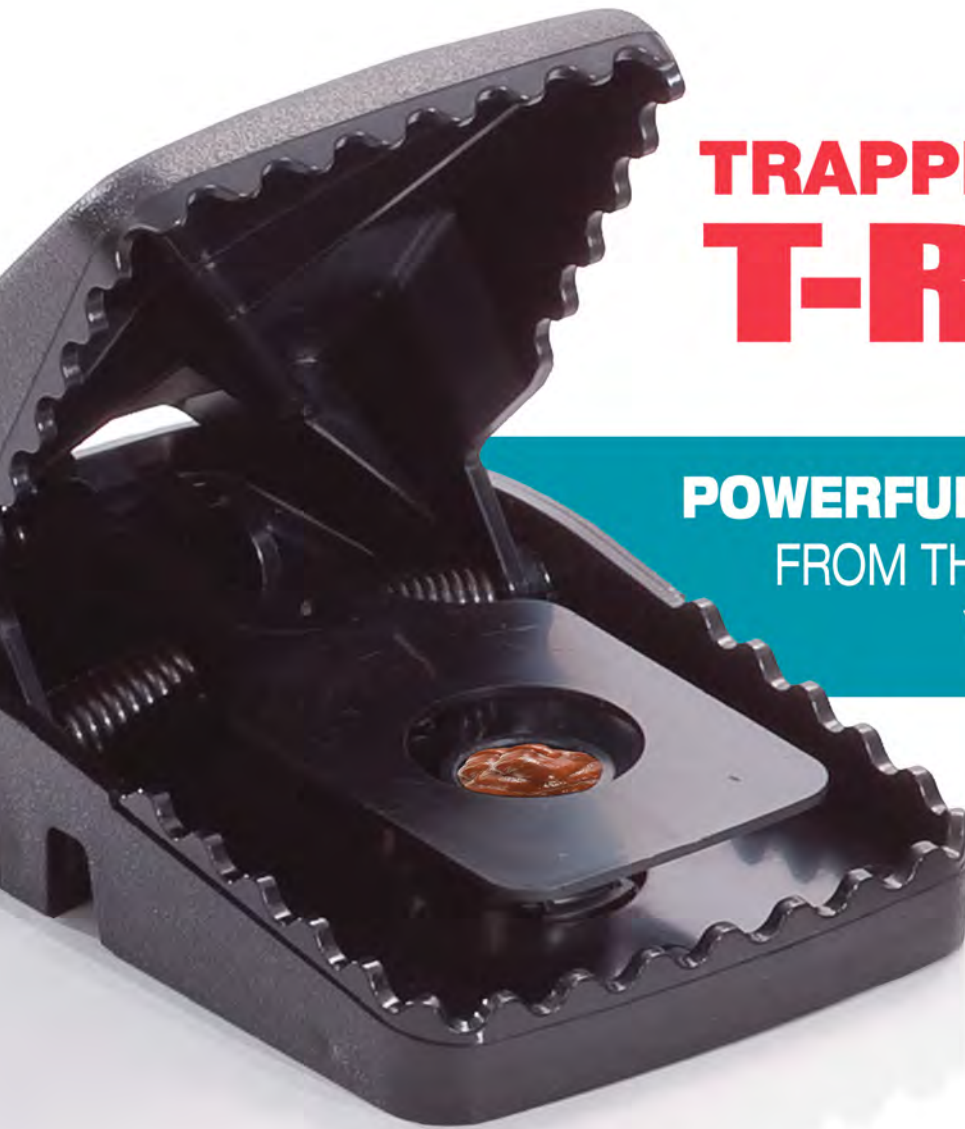
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PROJECTED TOP 2019 OBSTACLES

1. Lowballing competitors
2. Hiring & training
3. Do-It-Yourself competition
4. Health insurance
5. Weather

PROJECTED TOP 2019 OPPORTUNITIES

1. Increase referrals
2. Increase repeat business
3. Improve customer retention
4. Upsell services
5. Increase prices



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