

Rodenticides Market Assessment, By Type [Anticoagulants, Non-anticoagulants], By Form [Pellets, Blocks, Powders, Others], By Toxicity Level [High, Moderate, Low], By End-user [Residential, Commercial], By Region, Opportunities and Forecast, 2017-2031F

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Report description:

Global rodenticides market is projected to witness a CAGR of 5.56% during the forecast period 2024-2031, growing from USD 6.01 billion in 2023 to USD 9.27 billion in 2031. This market is an essential subsection of a wider pesticide industry since there is an ever-growing need for effective ways of controlling rodent populations that are dangerous to human health and cause substantial economic losses. Urbanization has played a significant role in shaping the dynamics of the market as it increases agricultural activities, leading to increased demand for pest control measures. Moreover, the demand for this market is further fueled by heightened awareness regarding health hazards associated with these animals such as hantavirus and leptospirosis.

The market features prominent players dedicated to innovating products that work well and preserve the environment concerning the increased regulation of the use of toxic materials. The primary division of the market consists of anticoagulants and non-anticoagulants, out of which anticoagulant agents are mainly recommended as they are proven to be more efficient than others.

Due to strict laws and greater awareness, North America and Europe have a more significant share of the market. On the contrary, urbanization, population growth, and increased agricultural activities are some of the factors contributing to the fastest growth and dominance of Asia-Pacific economies.

Market growth can be affected by various challenges, such as regulatory restrictions, environmental concerns, and the development of rodent resistance to certain rodenticides. However, continuous research and development alongside the launch of safe and efficient products are expected to yield fresh market prospects.

In October 2023, SenesTech, Inc. launched Evolve Soft Bait, which reduces the fertility of rats. Intended for both professionals and consumers alike, Evolve Soft Bait has an appealing taste to rats. It is simple to apply and can be placed in a variety of areas such

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as cities, parks, sports grounds, food production centers, prisons, underground railways, hospitals, agri-businesses, nature reserves, and homes.

Public Health Concerns Spur the Adoption of Rodenticides

Public health issues form a significant pull factor for the rodenticide industry since rodents are well-known vectors of numerous illnesses that endanger human existence. Rodents, especially rats and mice, act as vectors for several diseases, including leptospirosis, hantavirus, salmonella, and plague, which can be fatal. As per the U.S. Centers for Disease Control and Prevention, since the beginning of surveillance in 1993, 850 cases of hantavirus disease have been reported in the United States as of the end of 2021.

With the rising awareness, these health risks are becoming a public affair, and hence, private and public sectors are increasing their input for controlling rodents, leading to a high demand for rodenticides. Urban areas are at a higher risk of rodent-borne diseases as they have a very high human population living closely together, thereby facilitating the transmission of germs. The significance of controlling rodents in the future in disease outbreaks is steadily gaining importance to governments and health organizations, thus pushing more people into using rodenticides as a significant measure of keeping public health safe.

Agricultural Expansion Fuels Market Growth

Horticultural development is among the main factors propelling the growth of rodenticides, with enhanced agricultural pursuits causing an increased need for efficient procedures that deal with rodents. As far as agriculture is concerned, rodents are a considerable danger that can lead to huge losses on farms, farm product storage, and the structure of a farm. Generally, they are known to eat away vast amounts of food and pollute it in large quantities, thus causing enormous economic damage to farmers and the agriculture industry.

As agricultural land expands to meet the growing demand for food, especially in developing regions, the incidence of rodent infestations rises. In this light, there is a need for reliable rodenticides to protect crops, hence ensuring global food security. Rodenticides are often employed to control rodent populations, especially in crops and storage facilities, which would otherwise lead to crop loss and crop contamination.

Furthermore, the intensification of agriculture through monocultures and extensive agriculture creates optimal situations for the reproduction of rats. This leads to a rising necessity for safe rodenticides that can be utilized within the agricultural area, stimulating crop productivity and making sure it is profitable. For instance, in March 2024, Bell Laboratories, Inc. launched CADET All-Weather BLOX to remove rodent invasions. BLOX has a weight of 20g and contains Cholecalciferol or Vitamin D3 and is effective against rats and mice that resist anticoagulants. This novel-D3 formulation is robust, rainproof, and mildew-resistant making it suitable for indoor and outdoor applications.

Commercial Usage Holds Large Market Share

Almost all industries, such as food processing, hospitality, retailing, warehousing, and others, use rodenticides for commercial purposes. The involvement of rodents in these fields might lead to contamination of products, destruction of infrastructure, and violation of health conduct, resulting in poor financial performance of businesses and loss of reputation.

There are stringent hygiene regulations for businesses, mainly in the food and hospitality sectors. The risk of rodents spreading diseases or contaminating products makes rodent control a top priority. As a result, these sectors heavily invest in rodenticides to ensure compliance with health regulations and protect their operations from the detrimental effects of rodent infestations.

Apart from this, the increasing urbanization is associated with a higher number of commercial buildings, especially in areas with high population density that increase rodent predicaments. In response, more rodenticides are being used in various business premises to keep them rodent-free so as not to endanger and displease their clients or staff members.

Capitalizing on the trend, in April 2023, Target-Specialty Products launched a fast-acting and easy-to-use commercial rodenticide, CITO Paste, with brodifacoum as the primary ingredient. To be effectively used, applicators will need both a caulking gun and the corresponding bait station.

Asia-Pacific Holds a Substantial Market Share

In the global rodenticides market, Asia-Pacific has a significant stake, attributable to rapid urbanization, agricultural expansion, and increasing population density. Rodent invasion in cities is on the rise in countries such as China, India, and Southeast Asia, where there is an abundance of food, among other resources, favoring their existence. With this kind of urbanization and heightened health consciousness, the demand for effective rodent control measures, including rodenticides, has skyrocketed.

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Agriculture is one of the main components in Asia-Pacific and holds a significant market share. As agricultural activities expand to meet the food needs of the growing population, which has become a considerable challenge, rodent populations increase in farmlands and warehouses that pose threats to crops and grain storage. Rodenticides are crucial for safeguarding crops and stored cereals from the damage inflicted by rodents that can lead to substantial economic losses.

Moreover, the demand for rodenticides has been further driven by benign climatic conditions, which range from tropical to temperate in the region. Additionally, Asia-Pacific's increasing emphasis on public health and food safety will ensure continued steady growth in the rodenticides market in forthcoming years.

In June 2022, FGV Agri Services Sdn Bhd launched the First-generation sustainable rodenticide, Butik S, under the Paddy Production Incentive Scheme in Malaysia for treatment in the integration of cage owls. The anticoagulant bait is made with a variety of rat-palatable substances and is constructed with the right amount of weight, shape, and color to draw in rats.

Future Market Scenario (2024 – 2031F)

Due to the increasing concerns regarding environmental sustainability as well as the influence of harmful agents on unintended organisms, it is possible that there will be a change in the direction of the creation and usage of rodenticides that are more environmentally friendly.

The increasing public information on health problems connected with rodents will spur the requirement for rodenticides in homes and businesses.

Incorporating digital technologies such as smart rodent traps and monitoring systems would allow for more integrated rodenticides, thus offering an extensive pest control system.

Key Players Landscape and Outlook

The rodenticides market is characterized by the presence of several key players who dominate through innovation, extensive product portfolios, and strong distribution networks. Major companies are at the forefront of the market, leveraging their expertise in chemical formulations and pest control to offer effective rodenticide solutions. These players are increasingly focusing on developing environmentally friendly products that comply with stringent regulations, particularly in Europe and North America. In May 2022, Rentokil Initial plc an intelligent monitoring system, Internal Dual Autogate (IDAG), for rodent control to be used in internal settings. The product, which is a slimline, heavy-duty steel bait box, provides a professional and low-profile approach to the internal monitoring and management of rodents. In the case of all commercial environments, including warehouses, production shops, workplaces, and shopping centers, Rentokil's new IDAG system offers solutions for immediate and ongoing internal management of rodents thereby assisting businesses in overcoming the problem of increasing infestation incidences. In addition to these global giants, regional players in emerging markets such as Asia-Pacific are gaining traction. Companies in these regions are expanding their product offerings to cater to the growing demand for rodenticides in agriculture and urban pest control.

The market landscape is expected to become more competitive, with companies investing heavily in research and development to create innovative, safer, and more efficient rodenticides. Strategic partnerships, mergers, and acquisitions are expected to shape the future market as companies seek to strengthen their positions and expand their global reach. The increasing focus on sustainability and regulatory compliance will continue to drive product development and market strategies.

Table of Contents:

1. Project Scope and Definitions
2. Research Methodology
3. Executive Summary
4. Voice of Customer
 - 4.1. Demographics (Age/Cohort Analysis - Baby Boomers and Gen X, Millennials, Gen Z; Gender; Income - Low, Mid and High; Geography; Nationality; etc.)
 - 4.2. Market Awareness and Product Information
 - 4.3. Brand Awareness and Loyalty
 - 4.4. Factors Considered in Purchase Decision
 - 4.4.1. Efficacy

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- 4.4.2.□Safety for Non-target Species
- 4.4.3.□Environmental Impact
- 4.4.4.□Compliance With Regulatory Standards
- 4.4.5.□Cost-effectiveness
- 4.4.6.□Ease of Application
- 4.4.7.□Brand Reputation
- 4.4.8.□Specific Rodent Species Targeted
- 4.4.9.□Product Longevity
- 4.4.10.□Customer Reviews
- 4.5.□Purchase Channel
- 5.□Global Rodenticides Market Outlook, 2017-2031F
- 5.1.□Market Size Analysis & Forecast
- 5.1.1.□By Value
- 5.2.□Market Share Analysis & Forecast
- 5.2.1.□By Type
- 5.2.1.1.□Anticoagulants
- 5.2.1.1.1.□First-generation Anticoagulants
- 5.2.1.1.2.□Second-generation Anticoagulants
- 5.2.1.2.□Non-anticoagulants
- 5.2.2.□By Form
- 5.2.2.1.□Pellets
- 5.2.2.2.□Blocks
- 5.2.2.3.□Powders
- 5.2.2.4.□Others
- 5.2.3.□By Toxicity Level
- 5.2.3.1.□High
- 5.2.3.2.□Moderate
- 5.2.3.3.□Low
- 5.2.4.□By End-user
- 5.2.4.1.□Residential
- 5.2.4.2.□Commercial
- 5.2.4.2.1.□Agricultural Fields
- 5.2.4.2.2.□Warehouses
- 5.2.4.2.3.□Pest Control Companies
- 5.2.4.2.4.□Others
- 5.2.5.□By Region
- 5.2.5.1.□North America
- 5.2.5.2.□Europe
- 5.2.5.3.□Asia-Pacific
- 5.2.5.4.□South America
- 5.2.5.5.□Middle East and Africa
- 5.2.6.□By Company Market Share Analysis (Top 5 Companies and Others - By Value, 2023)
- 5.3.□Market Map Analysis, 2023
- 5.3.1.□By Type
- 5.3.2.□By Form
- 5.3.3.□By Toxicity Level
- 5.3.4.□By End-user

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- 5.3.5. By Region
- 6. North America Rodenticides Market Outlook, 2017-2031F*
 - 6.1. Market Size Analysis & Forecast
 - 6.1.1. By Value
 - 6.2. Market Share Analysis & Forecast
 - 6.2.1. By Type
 - 6.2.1.1. Anticoagulants
 - 6.2.1.1.1. First-generation Anticoagulants
 - 6.2.1.1.2. Second-generation Anticoagulants
 - 6.2.1.2. Non-anticoagulants
 - 6.2.2. By Form
 - 6.2.2.1. Pellets
 - 6.2.2.2. Blocks
 - 6.2.2.3. Powders
 - 6.2.2.4. Others
 - 6.2.3. By Toxicity Level
 - 6.2.3.1. High
 - 6.2.3.2. Moderate
 - 6.2.3.3. Low
 - 6.2.4. By End-user
 - 6.2.4.1. Residential
 - 6.2.4.2. Commercial
 - 6.2.4.2.1. Agricultural Fields
 - 6.2.4.2.2. Warehouses
 - 6.2.4.2.3. Pest Control Companies
 - 6.2.4.2.4. Others
 - 6.2.5. By Country Share
 - 6.2.5.1. United States
 - 6.2.5.2. Canada
 - 6.2.5.3. Mexico
 - 6.3. Country Market Assessment
 - 6.3.1. United States Rodenticides Market Outlook, 2017-2031F*
 - 6.3.1.1. Market Size Analysis & Forecast
 - 6.3.1.1.1. By Value
 - 6.3.1.2. Market Share Analysis & Forecast
 - 6.3.1.2.1. By Type
 - 6.3.1.2.1.1. Anticoagulants
 - 6.3.1.2.1.1.1. First-generation Anticoagulants
 - 6.3.1.2.1.1.2. Second-generation Anticoagulants
 - 6.3.1.2.1.2. Non-anticoagulants
 - 6.3.1.2.2. By Form
 - 6.3.1.2.2.1. Pellets
 - 6.3.1.2.2.2. Blocks
 - 6.3.1.2.2.3. Powders
 - 6.3.1.2.2.4. Others
 - 6.3.1.2.3. By Toxicity Level
 - 6.3.1.2.3.1. High

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- 6.3.1.2.3.2. □Moderate
- 6.3.1.2.3.3. □Low
- 6.3.1.2.4. □By End-user
- 6.3.1.2.4.1. □Residential
- 6.3.1.2.4.2. □Commercial
- 6.3.1.2.4.2.1. □Agricultural Fields
- 6.3.1.2.4.2.2. □Warehouses
- 6.3.1.2.4.2.3. □Pest Control Companies
- 6.3.1.2.4.2.4. □Others
- 6.3.2. □Canada
- 6.3.3. □Mexico

*All segments will be provided for all regions and countries covered

7. □Europe Rodenticides Market Outlook, 2017-2031F

- 7.1. □Germany
- 7.2. □France
- 7.3. □Italy
- 7.4. □United Kingdom
- 7.5. □Russia
- 7.6. □Netherlands
- 7.7. □Spain
- 7.8. □Turkey
- 7.9. □Poland

8. □Asia-Pacific Rodenticides Market Outlook, 2017-2031F

- 8.1. □India
- 8.2. □China
- 8.3. □Japan
- 8.4. □Australia
- 8.5. □Vietnam
- 8.6. □South Korea
- 8.7. □Indonesia
- 8.8. □Philippines

9. □South America Rodenticides Market Outlook, 2017-2031F

- 9.1. □Brazil
- 9.2. □Argentina

10. □Middle East and Africa Rodenticides Market Outlook, 2017-2031F

- 10.1. □Saudi Arabia
- 10.2. □UAE
- 10.3. □South Africa

- 11. □Demand Supply Analysis
- 12. □Import and Export Analysis
- 13. □Value Chain Analysis
- 14. □Porter's Five Forces Analysis
- 15. □PESTLE Analysis
- 16. □Macro-economic Indicators
- 17. □Pricing Analysis
- 18. □Profit Margin Analysis
- 19. □Market Dynamics

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- 19.1. Market Drivers
- 19.2. Market Challenges
- 20. Market Trends and Developments
- 21. Case Studies
- 22. Competitive Landscape
 - 22.1. Competition Matrix of Top 5 Market Leaders
 - 22.2. Company Ecosystem Analysis (Startup v/s SME v/s Large-scale)
 - 22.3. SWOT Analysis for Top 5 Players
 - 22.4. Key Players Landscape for Top 10 Market Players
 - 22.4.1. BASF SE
 - 22.4.1.1. Company Details
 - 22.4.1.2. Key Management Personnel
 - 22.4.1.3. Products and Services
 - 22.4.1.4. Financials (As Reported)
 - 22.4.1.5. Key Market Focus and Geographical Presence
 - 22.4.1.6. Recent Developments/Collaborations/Partnerships/Mergers and Acquisition
 - 22.4.2. Bayer AG
 - 22.4.3. PelGar International Ltd
 - 22.4.4. Syngenta Crop Protection, LLC
 - 22.4.5. Rentokil Initial plc
 - 22.4.6. Liphatech, Inc.
 - 22.4.7. SenesTech, Inc.
 - 22.4.8. Anticimex International AB
 - 22.4.9. Impex Europa SL
 - 22.4.10. T Eaton & Co., Inc.
- 23. Strategic Recommendations
- 24. About Us and Disclaimer

*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.

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