

## **Household Insecticides - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)**

Market Report | 2026-01-16 | 135 pages | Mordor Intelligence

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### **Report description:**

Household Insecticides Market Analysis

The household insecticides market size in 2026 is estimated at USD 20.23 billion, growing from 2025 value of USD 18.9 billion with 2031 projections showing USD 28.45 billion, growing at 7.05% CAGR over 2026-2031. Intensifying vector-borne disease outbreaks, rapid urbanization, and regulatory incentives for low-toxicity actives drive this expansion within the household insecticides market. Escalating dengue fever cases, which rose to 12.4 million in 2024, underscore the public health urgency that fuels premium demand for mosquito and fly control solutions. Regulatory agencies are expediting approvals for bio-based ingredients while tightening scrutiny on synthetic pyrethroids, prompting manufacturers to accelerate natural portfolio development. Asia-Pacific holds the largest household insecticides market share at 40.0% due to dense cities that favor vector breeding, and the region's players are debuting indigenous molecules to counter local resistance patterns. Meanwhile, e-commerce platforms widen global reach and enable data-rich, direct-to-consumer models that reward brands with strong digital engagement. Supply chain volatility in raw materials adds cost pressure, but premium outdoor living segments and smart IoT-enabled devices open new revenue pathways.

Global Household Insecticides Market Trends and Insights

Rising Prevalence of Insect-Borne Diseases

Dengue, malaria, and chikungunya outbreaks are surging far beyond historical baselines, making disease prevention the primary

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purchase trigger in the household insecticides market. Global dengue incidence jumped 230% from 2023 to 2024, propelling consumers toward continuous protection products that command premium price points. Climate change lengthens mosquito breeding seasons and expands *Aedes aegypti* into temperate zones, which opens new sales pockets in Europe and North America. Governments subsidize spray and coil purchases for vulnerable communities, especially in South America, where the dengue burden threatens economic productivity. Brands leveraging medical endorsements and scientific messaging enjoy stronger household penetration, as insecticides shift from convenience goods to essential health safeguards. Brazil's record dengue year drove innovation in long-lasting formulations, reinforcing the link between epidemiological pressure and research and development focus.

#### Expansion of Modern Retail and E-commerce Channels

Digital platforms now outpace traditional hardware stores for do-it-yourself pest control. Amazon alone moved USD 1.3 billion of pest control products in Germany during 2024, dwarfing specialty retail volumes. Online availability elevates product transparency, letting challengers compete with incumbents through content-rich listings and review engines. Subscription models lock in replenishment, increasing customer lifetime value and smoothing demand seasonality in the household insecticides market. Data captured from clickstream and purchase histories guides targeted promotions and informs formulation tweaks. The channel shift accelerates cross-border expansion because brands bypass legacy wholesalers, although complex labeling laws still require localized packaging. Millennial and Gen Z shoppers lead the online cohort, purchasing insect repellents 60% more often via mobile than older consumers.

#### Stringent Global and National Chemical Regulations

REACH registration fees and testing costs now exceed EUR 50 million (USD 54 million) annually for leading suppliers. Pyrethroid re-evaluations delay launches by up to two years. Smaller firms lack the capital to clear such hurdles, leading to potential consolidation and reduced innovation diversity. Divergent national rules force brands to maintain multiple formulations, pushing operational costs 15-20% higher than under harmonized regimes. The precautionary principle fuels uncertainty, making long-horizon research and development investments riskier.

Other drivers and restraints analyzed in the detailed report include:

Rapid Urbanization and Population Density Growth  
Regulatory Shift Toward Low-Toxicity Bio-based Actives  
Health and Environmental Toxicity Concerns

For complete list of drivers and restraints, kindly check the Table Of Contents.

#### Segment Analysis

Mosquitoes and flies controlled 33.62% of the household insecticides market share in 2025, propelled by dengue and malaria fears and boosted by continuous spray and coil adoption. The household insecticides market size attributable to these vectors will maintain leadership as climate change widens endemic zones. Godrej's renofluthrin launch directly tackles pyrethroid-resistant mosquitoes and underscores how vector pressure guides research and development focus. Bedbugs and beetles climb fastest at 9.41% CAGR because resurgent travel accelerates urban infestations; landlords in dense cities purchase residual aerosols to avert tenant turnover. Termite treatments remain regionally important in the tropics, sustaining premium pricing tied to property damage prevention. Rodent control plateaus but gains incremental volume in high-rise complexes where food waste collection lags, prompting hybrid bait and snap systems.

Consumer spending patterns reveal a hierarchy that favors health protection over property preservation. Vector control products

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tolerate 10-15% price premiums even when active ingredient costs are similar. Marketing increasingly highlights disease statistics to reinforce urgency. As travel rebounds, luggage-compatible bedbug sprays and laundry additives enter big box chains. Utility corridors in apartment towers serve as superhighways for cockroaches and ants, elevating demand for residual formulations and smart monitoring traps that alert maintenance staff before infestations spread building-wide.

The Household Insecticides Market Report is Segmented by Insect Type (Termites, Bedbugs and Beetles, and More), Chemical Type (Synthetic and Natural), Form (Dust and Granules, Liquids, Aerosol Sprays, Creams and Lotions, and More), and Geography (North America, Europe, Asia-Pacific, Middle East, and Africa). The Market Forecasts are Provided in Terms of Value (USD).

## Geography Analysis

Asia-Pacific commanded a 39.58% share of the household insecticides market size in 2025 and is projected to rise at a 7.12% CAGR driven by megacity sprawl, high disease burden, and year-round warmth. India leads volume as Godrej pioneers indigenous actives and leverages vast distribution across general trade outlets. China's expanding middle class channels spending into premium natural coils and smart devices, while Japan's Earth Corporation sustains dominance through patented cockroach baits and recorded sales of JPY 139 billion (USD 930 million) in 2024 EARTH.JP. Southeast Asia shows the fastest incremental growth owing to government dengue campaigns that subsidize aerosol purchases.

The United States sees naturals encroaching on synthetic market share amid heightened chemical scrutiny, yet DEET remains entrenched for camping and hiking. Canada's stricter labeling laws slow new product launches but reinforce consumer trust in approved brands. Mexico emerges as a high-growth pocket as dengue spreads northward and retail infrastructure modernizes. Regional e-commerce penetration above 40% makes direct-to-consumer subscriptions the norm for urban households.

REACH compliance burdens and shorter pest seasons in temperate zones restrain Europe's market expansion. Southern Europe, from Spain to Greece, exhibits higher per-capita usage due to extended summers. Germany leads unit sales through DIY chains and online platforms, whereas the United Kingdom market pivots heavily toward pet-safe fume-free sprays following high press coverage of asthma concerns.

## List of Companies Covered in this Report:

SC Johnson & Son, Inc. Reckitt Benckiser Group plc Godrej Consumer Products Ltd. Spectrum Brands Holdings, Inc. Sumitomo Chemical Co., Ltd. Henkel AG & Co. KGaA (Combat) Bayer AG BASF SE FMC Corporation Central Garden & Pet Company Rentokil Initial plc Rollins, Inc. Ecolab Inc. UPL Limited Dabur India Limited

## Additional Benefits:

<ul> The market estimate (ME) sheet in Excel format  
3 months of analyst support </ul>

## Table of Contents:

1 Table of Contents for Global Household Insecticides Market

2 Introduction

2.1 Study Assumptions and Market Definition

2.2 Scope of the Study

3 Research Methodology

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## 4 Executive Summary

## 5 Market Landscape

### 5.1 Market Overview

### 5.2 Market Drivers

5.2.1 Rising prevalence of insect-borne diseases

5.2.2 Expansion of modern retail and e-commerce channels

5.2.3 Rapid urbanization and population density growth

5.2.4 Regulatory shift toward low-toxicity bio-based actives

5.2.5 Emergence of smart/IoT-enabled insect-control devices

5.2.6 Outdoor living trend boosting demand for patio/yard solutions

### 5.3 Market Restraints

5.3.1 Stringent global and national chemical regulations

5.3.2 Health and environmental toxicity concerns

5.3.3 Tariff-driven volatility in raw-material supply chains

5.3.4 Rising pest resistance reducing product efficacy

### 5.4 Technological Outlook

### 5.5 Regulatory Landscape

### 5.6 Porter's Five Forces Analysis

5.6.1 Bargaining Power of Suppliers

5.6.2 Bargaining Power of Buyers

5.6.3 Threat of New Entrants

5.6.4 Threat of Substitute Products

5.6.5 Intensity of Competitive Rivalry

## 6 Market Size and Growth Forecasts

### 6.1 By Insect Type (Value)

6.1.1 Mosquitoes and Flies

6.1.2 Rats and Other Rodents

6.1.3 Termites

6.1.4 Bedbugs and Beetles

6.1.5 Other Insect Types

### 6.2 By Chemical Type (Value)

6.2.1 Synthetic

6.2.1.1 DEET

6.2.1.2 Picaridin

6.2.1.3 Other Synthetic Chemicals

6.2.2 Natural

6.2.2.1 Citronella Oil

6.2.2.2 Geraniol Oil

6.2.2.3 Other Natural Oils

### 6.3 By Form (Value)

6.3.1 Dust and Granules

6.3.2 Liquids

6.3.3 Aerosol Sprays

6.3.4 Coils and Vaporizers

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- 6.3.5 Creams and Lotions
- 6.3.6 Other Forms
- 6.4 By Geography (Value)
  - 6.4.1 North America
    - 6.4.1.1 United States
    - 6.4.1.2 Canada
    - 6.4.1.3 Mexico
    - 6.4.1.4 Rest of North America
  - 6.4.2 Europe
    - 6.4.2.1 Germany
    - 6.4.2.2 United Kingdom
    - 6.4.2.3 France
    - 6.4.2.4 Italy
    - 6.4.2.5 Spain
    - 6.4.2.6 Russia
    - 6.4.2.7 Rest of Europe
  - 6.4.3 Asia-Pacific
    - 6.4.3.1 China
    - 6.4.3.2 India
    - 6.4.3.3 Japan
    - 6.4.3.4 Australia
    - 6.4.3.5 Singapore
    - 6.4.3.6 Rest of Asia-Pacific
  - 6.4.4 Middle East
    - 6.4.4.1 Saudi Arabia
    - 6.4.4.2 United Arab Emirates
    - 6.4.4.3 Rest of Middle East
  - 6.4.5 Africa
    - 6.4.5.1 South Africa
    - 6.4.5.2 Egypt
    - 6.4.5.3 Rest of Africa

## 7 Competitive Landscape

### 7.1 Market Concentration

### 7.2 Strategic Moves

### 7.3 Market Share Analysis

### 7.4 Company Profiles (Includes Global-level Overview, Market-level Overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share, Products and Services, Recent Developments)

#### 7.4.1 SC Johnson & Son, Inc.

#### 7.4.2 Reckitt Benckiser Group plc

#### 7.4.3 Godrej Consumer Products Ltd.

#### 7.4.4 Spectrum Brands Holdings, Inc.

#### 7.4.5 Sumitomo Chemical Co., Ltd.

#### 7.4.6 Henkel AG & Co. KGaA (Combat)

#### 7.4.7 Bayer AG

#### 7.4.8 BASF SE

#### 7.4.9 FMC Corporation

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7.4.10 Central Garden & Pet Company

7.4.11 Rentokil Initial plc

7.4.12 Rollins, Inc.

7.4.13 Ecolab Inc.

7.4.14 UPL Limited

7.4.15 Dabur India Limited

8 Market Opportunities and Future Outlook

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