

## **PCO/TCO/Fumigation Service Market in Japan: Key Research Findings 2016**

### ◆ **Research Outline**

**Yano Research Institute has conducted a study on the domestic market of PCO/TCO/Fumigation services with the following conditions:**

1. Research period: August to November, 2016
2. Research target: Providers of PCO (Pest Control Operator) services, TCO (Termite Control Operator) services, and fumigation services
3. Research methodologies: Face-to-face research by the expert researchers, surveys via telephone, and literature research

#### **<What is the PCO/TCO/Fumigation Service Market?>**

A PCO (Pest Control Operator) service indicates a service to prevent, control, and exterminate pests that endanger public health such as cockroaches, rats, flies, mosquitos, and mites. A TCO (Termite Control Operator) service indicates a service to prevent, control, and exterminate termite, and a fumigation service indicates a service of fumigation treatment on imported/exported agricultural products, cultural assets, and grain warehouses, complying with the relevant regulations including the Plant Protection Law. Note that the market does not include pesticides or repellent chemicals themselves but only the services to expel pests. Note also that the market excludes peripheral equipment like apparatuses for pesticide spray and protective clothing.

### ◆ **Key Findings**

#### ■ **FY2015 PCO/TCO Fumigation Service Market Attained 125.860 Billion Yen, 103.4% on Y-o-Y Basis**

The domestic market of PCO (Pest Control Operator), TCO (Termite Control Operator), and fumigation services in FY2015 attained 125.860 billion yen, 103.4% of the size of the previous fiscal year, based on the sales of the businesses. It seems that the market has bottomed out from the prolonged stagnation.

#### ■ **Leading PCO Service Providers Expanded Business to Provide Consultation Services including Total Hygiene Management**

Some large PCO service providers have increased the sales by providing extensive services, from consulting services to prevent contamination at factories for manufacturing foods, drugs, and etc. and to regularly-scheduled hygiene management services. Such sales expansion has widened the gaps between the leading service providers and small-to-mid-size providers.

#### ■ **FY2016 PCO/TCO Fumigation Service Market Projected to Achieve 127.800 Billion Yen, 101.5% on Y-o-Y Basis**

The market of PCO, TCO, and fumigation service for FY2016 is expected to achieve 127.800 billion yen, 101.5% of the size of the previous fiscal year, based on the sales of the businesses.

The demand of PCO services has increased as the user companies, especially food manufacturers, have started taking measures to prevent contamination and to thoroughly

extinguish pests due to the recent contamination incidents. The demand of TCO services is supported by the demand of underfloor works aiming to protect from and extinguish termite, stemming from the growing awareness for making the residence long-life and maintained in good condition involving disaster prevention. In fumigation service category, the demand to fumigate exporting woods and etc., has increased. The above factors drove the market to rise slightly.

◆ **Report Format:**

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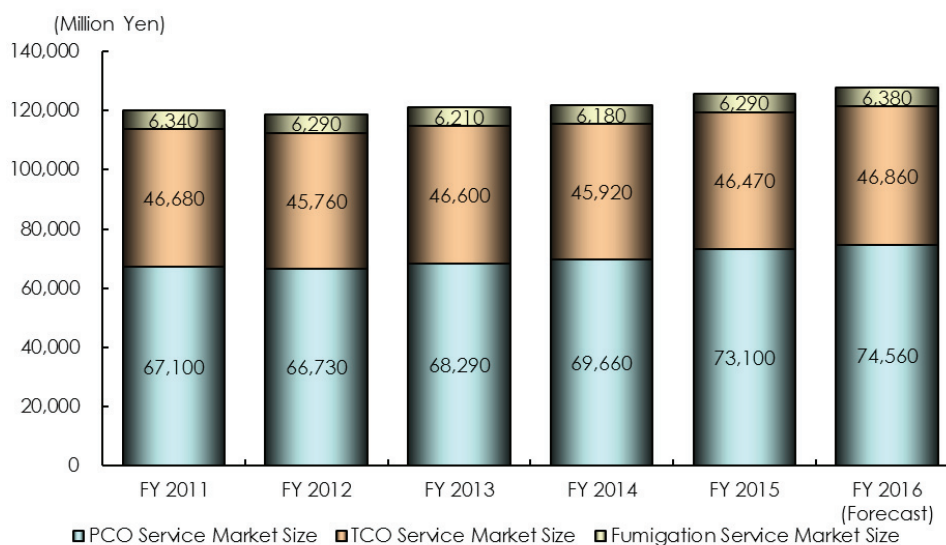
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■ **Figure & Table 1: Transition of PCO/TCO/Fumigation Service Market Size**



Market Category	FY 2011	FY 2012	FY 2013	FY 2014	FY 2015	FY 2016 (Forecast)
PCO Service Market Size	67,100	66,730	68,290	69,660	73,100	74,560
TCO Service Market Size	46,680	45,760	46,600	45,920	46,470	46,860
Fumigation Service Market Size	6,340	6,290	6,210	6,180	6,290	6,380
Total Market Size (TOTAL)	120,120	118,780	121,100	121,760	125,860	127,800

Source: Yano Research Institute

Notes:

1. The market size is calculated based on the sales of businesses.
2. The market does not include pesticides or repellent chemicals themselves but only the services to expel pests. Note also that the market excludes peripheral equipment like apparatuses for pesticide spray and protective clothing.