



Shaping the Future of the Pest Management Industry

Die Zukunft der Schädlingsbekämpfungsindustrie bilden

Formando el futuro de la Industria del Control de Plagas

Formation du futur de l'industrie de gestion de parasite

ペストマネージメント事業の未来を創生する

塑造害蟲控管業之未來

www.xenexassociates.com



Perspectiva para o sector de Controlo de Pragas em 2020

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Senior Associate

Shaping the Future of the Pest Management Industry



Formando el futuro de la Industria del Control de Plagas



www.xenexassociates.com

- Over 25 years industry experience world wide in Senior commercial positions in international companies
- Regular industry commentator for many industry magazines: PCT, Agrow, International Pest Control, Pest+ and invited presenter at International Conferences.

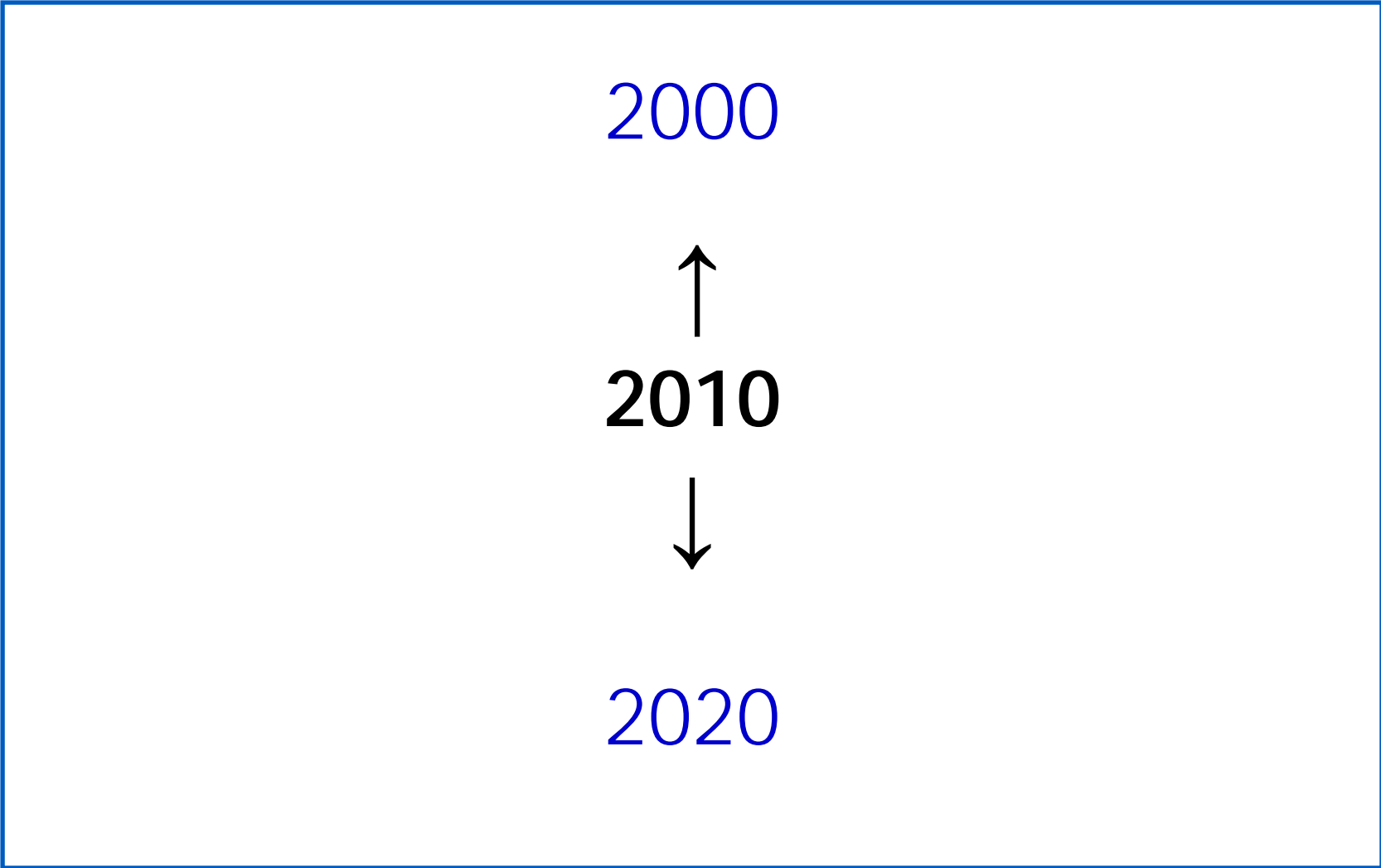


- Own and manage the leading international strategy consultants Xenex Associates with a worldwide client base from chemical companies to private capital investors, lawyers and inventors
- Until June 2010 Part Time Director General of CEPA - The European Pest Management Industry Association

Shaping the Future of the Pest Management Industry



Where are we now ?



Shaping the Future of the Pest Management Industry

- What was the web. Did we have a website. Was it business critical?
- How much did it matter what happened in the industry outside Brasil matter?
- Was production of organic food an issue for pest managers?
- Who were the auditors and were there activities business critical?
- How important were international hospitality and beverage clients?
- How many of today's chemical products were available?
- Are the pests the same today as in 2000?

- The web is our face 24-7. We are moving towards appointments fixed through the web without interaction – like other modern industries.
- It matters what happens in the “world “ of pest management, but it matters more what is happening with the European Commission.
- Organic production is mainstream pest management. Ethical and Social issues are now the challenge. Green is not a nice idea it is the focus of European society.
- We work with the Auditors as our colleagues, engaging to influence them as the client takes more notice of them than us.
- We work with 40% less chemicals than 2000 and only one new chemical
- We are learning how to manage new pests: Termites, Mosquitoes and Bed Bugs....

- The Informed Consumer
- Increasing Audit Systems
- The Regulatory Environment
- Prevention replacing Control



The Informed Consumer

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THE INFORMED CONSUMER

Manages the Agenda: Hotels, Supermarket & Fast Food, also Schools & Local Government

FOOD RETAILING



FOOD MANUFACTURE



HOSPITALITY



FAST FOOD

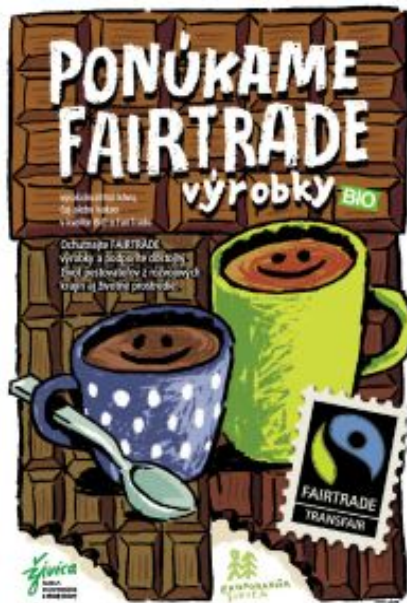


THE INFORMED CONSUMER

- Driving the Agenda: Hotels, Supermarket & Fast Food, also Schools & Local Government
- The Organic Consumer → Ethical Consumer



THE ORGANIC SHOPPER



THE ETHICAL SHOPPER



THE INFORMED CONSUMER

- Driving the Agenda: Hotels, Supermarket & Fast Food, also Schools & Local Government
- The Organic Consumer → Ethical Consumer
- Access to Information (“Web Literate”) and increasingly using the Web as an information source





Increasing Audit Systems

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Managing Product Use patterns: Bait Boxes, Non Pesticide treatment, Monitoring Blocks



BRITISH RETAIL CONSORTIUM
for successful and responsible retailing



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INCREASING AUDIT SYSTEMS

- Driving Product Use patterns: Bait Boxes, Non Pesticide treatment, Monitoring Blocks
- Driving Product Changes: Global Products and Brands, Global Standards

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- Driving Product Use patterns: Bait Boxes, Non Pesticide treatment, Monitoring Blocks
- Driving Product Changes: Global Products and Brands, Global Standards
- Influencing the supply channel: Food Industry
- Driving Up Industry Standards: Accreditation, Work Policies, Industry Competence and Training

Membership No M15/764



This is to certify that

Expert Pest Control Services

is a Member of the British Pest Control Association for the year indicated below, and thereby has undertaken to observe the Association's Code of Practice and Code of Conduct.

Association Year 2004
Valid until 31 March 2005

Chairman

Company Secretary



The Regulatory Environment

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- EPA: All Rodent Baits in Boxes

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- Moving from Scientific Assessment to Political Football
The Informed Consumer → Influences the European Parliament
- Diverting new product development funding into Product Defense



Prevention Replacing Control

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- New Product Development focus on novel ideas without chemicals:
Bed Bug Barrier, Exoroach Trap

Novel non pesticide ideas



Exoroach Trap



Bed Bug Barrier



PREVENTION REPLACING CONTROL

- New Product Development focus on novel ideas without pesticides: Bed Bug Barriers, Exoroach Trap
- Excluding pests initially: Mouse Mesh, Mobe Moat

Excluding Pests



Mobe Moat



MouseMesh



PREVENTION REPLACING CONTROL

- New Product Development focus on novel ideas without pesticides: Mosquito Killer Machine, Exoroach Trap
- Excluding pests initially: MouseMesh, Mobe Moat
- Monitoring Systems: Bed Bug Monitors



BB Alert System

- **Market**
Still insect and rodent control dominated.
Termites and mosquitoes will become an increasing challenge
Biggest growth will be in NON chemical products
- **Industry Culture**
Unified approach to industry standards
- **Minimal New Chemical Products**
No generic products
More emphasis on prevention not cure
Less major chemical suppliers
- **Auditing will be the Standard**
Self accreditation
Totally web based feedback and reporting



What will the Pest Manager in 2020 look like?



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What will the Pest Manager in 2020 look like?



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**WHICH WILL BE
YOUR MOST
IMPORTANT
EQUIPMENT IN
2020?**



XENEX
ASSOCIATES

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