OUR MISSION IS YOUR PROTECTION.

THE FUTURE IS BRIGHT
MY FAMILY

Matt, Sadie-bird
Foster, Guinness & Stella
INDUSTRY OVERVIEW

19,820 COMPANIES

153,825 SERVICE TECHNICIANS

$8.5 BILLION IN ANNUAL BILLING

THE PROFESSIONAL PEST MANAGEMENT INDUSTRY
Protectors of public health, food and property from the diseases and dangers of pests

Courtesy Specialty Products Consultants, LLC - A Strategic Analysis of the U.S. Structural Pest Control Industry - 2017
## Total Service Revenues

<table>
<thead>
<tr>
<th>Year</th>
<th>Revenues</th>
<th>Growth Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>$8.597 billion</td>
<td>+5.2%</td>
</tr>
<tr>
<td>2016</td>
<td>$8.175 billion</td>
<td>+4.6%</td>
</tr>
<tr>
<td>2015</td>
<td>$7.815 billion</td>
<td>+4.7%</td>
</tr>
<tr>
<td>2014</td>
<td>$7.466 billion</td>
<td>+3.5%</td>
</tr>
<tr>
<td>2013</td>
<td>$7.213 billion</td>
<td>+5.9%</td>
</tr>
<tr>
<td>2012</td>
<td>$6.815 billion</td>
<td>+4.5%</td>
</tr>
<tr>
<td>2008</td>
<td>$6.593 billion</td>
<td>-1.7%</td>
</tr>
</tbody>
</table>

(Source: Specialty Consultants)
## How Does Our Industry's Growth Rate Compare to U.S. GDP Growth Rate?

<table>
<thead>
<tr>
<th>Year</th>
<th>U.S Growth Rate</th>
<th>Industry Growth Rate</th>
<th>Events Impacting Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>2.3%</td>
<td>+5.2%</td>
<td>Trump Tax Cut</td>
</tr>
<tr>
<td>2016</td>
<td>1.5%</td>
<td>+4.6%</td>
<td>Presidential Race</td>
</tr>
<tr>
<td>2015</td>
<td>2.9%</td>
<td>+4.7%</td>
<td>TPP, Iran Deal</td>
</tr>
<tr>
<td>2014</td>
<td>2.6%</td>
<td>+3.5%</td>
<td>QE Ends</td>
</tr>
<tr>
<td>2013</td>
<td>1.7%</td>
<td>+5.9%</td>
<td>Sequestration</td>
</tr>
<tr>
<td>2012</td>
<td>2.2%</td>
<td>+4.5%</td>
<td>Fiscal Cliff</td>
</tr>
<tr>
<td>2008</td>
<td>-0.3%</td>
<td>-1.7%</td>
<td>Financial Crisis</td>
</tr>
</tbody>
</table>

(Source: Specialty Consultants; Commerce Department Reports; Various Business Publications)
NPMA TODAY

79 Countries represented by membership

$5.9M NPMA’s annual revenue

1 National Industry Association

85 Years Old

93 Companies in PCT Top 100

5,500 Members Strong

29 Dedicated Staff

27 NPMA Board of Directors

23 Committees
INTEGRITY
We strive for honesty, fairness, professionalism, transparency and are ethical at all times.

LIFE BALANCE
We promote a work culture and life balance that honors staff and their families.

FUN
We promote a positive, energizing, optimistic and fun environment where we celebrate each small success in our journey to achieve big.

TEAMWORK
We drive success through strong collaboration and communication using our shared collective genius.

NPMA TEAM

MISSION STATEMENT
NPMA supports members in being professional, knowledgeable, and proficient through education, industry leadership, advocacy, and growth of the market.

VISION STATEMENT
Every household and business can have professional pest management services.
WHAT WE DO

• We fight for fair legislation and regulations that are in the best interests of our industry
• We protect public health
• We improve the quality and accessibility to good education
• We train and test thousands of pest professionals
• We create standards and demand excellence
• We make positive connections with consumers and improve the professionalism of our industry
• We are the catalyst for change
TOP 10 BENEFITS OF MEMBERSHIP

• NPMA Health Insurance Exchange Program
• Online Education at the NPMA Resource Center
• Complimentary Human Resource Consulting
• Employee Recruitment Tools
• Discounted Trucks Through Nissan
• Free Professional Pest Pictures (royalty free)
• Background Screening
• Collections Services
• NPMA Community Web Site
• National Consumer Exposure to Help Grow Your Business

UPDATE YOUR MEMBER PROFILE

• Identify important topics so we can send you the information you want to hear about
• Update your service area zip codes for Find-a-Pro
• Add/remove employees from your company roster
• Download your membership certificate
PRIDE & PROFESSIONALISM
TRAINING RESOURCES

NPMA’s
Online Learning Center

• Over 350 credits available!
• 26 exclusive courses
• Featuring a New Hire Training
• Coming Soon! NPMA360
• Members receive a 50% discount
Mobile Field Guide

• Control and ID information for over 200 pests
• Contact NPMA entomologists directly
Respirable crystalline silica exposure can occur during construction tasks that require alterations to concrete. For instance, exposure can occur in the pest control industry primarily during termite treatments that require drilling into concrete.

Exposure to high concentrations of respirable crystalline silica over long periods of time can increase the likelihood of silicosis, lung cancer, kidney disease, as well as chronic obstructive pulmonary disease (COPD).

To limit exposure to respirable crystalline silica, the U.S. Department of Labor’s Occupational Safety and Health Administration (OSHA) has issued new standards [1] to help protect workers. For construction, this standard took effect on September 23, 2017 and requires that employers comply with this standard by the effective date.

To comply with the new rule, employers must: a) develop a written Silica Exposure Control Plan (see Appendix A in the Customizable Control Plan below) and limit employee exposure to respirable crystalline silica on the job below the permissible exposure limit (PEL) established by OSHA.

Employers may claim exclusion from the standard based on objective data using the
NEW INSURANCE EXCHANGE PROGRAM

AVAILABLE EXCLUSIVELY TO NPMA MEMBER COMPANIES, THEIR EMPLOYEES AND THEIR FAMILIES

HEALTH INSURANCE for NPMA Members

LEARN MORE

Learn more at https://npmapestworld.org/member-center/npma-health-insurance-exchange/
RECRUITMENT & RETENTION


Every growing company needs to find, hire, train & retain employees.
PROTECTING YOUR BUSINESS

NPMA is tirelessly advocating on behalf of the industry before Congress, Executive Agencies, State Legislatures and State Regulators

- Congressional initiatives: 2018 Farm Bill
- U.S. Environmental Protection Agency (EPA): Pesticide Registration & Review
- SPAR Program
- Daily monitoring/engagement Federal & State issues
2018 STATE LEGISLATION

- **Pesticide Legislation Overview:** During this legislative session, NPMA and SPARs engaged in 743 total bills, and 193 pesticide-related bills in 23 states. **Proudly, NO proposed bills that would ban or restrict pesticides for the structural pest management industry passed or became law in 2018.** Nevertheless, product bans are an ever-persistent threat, and NPMA will be there every step of the way to defend the industry.

- **Occupational Licensing Reform Legislation:** For the 2018 session, NPMA is currently tracking and engaged in 129 occupational licensing reform bills that could affect the structural pest management industry in 30 states.

- **Service Taxes:** In an ever-changing 21st Century economy, state governments are shifting the ways they collect revenue by expanding state sales taxes to service industries.

- **Pesticide Preemption:** states that allow local governments to regulate pesticides, PMPs battle daily with conflicting, confusing, and overlapping regulations. In states that prevent local governments from regulating pesticides, our industry must mount an impenetrable defense of existing state law, as activists relentlessly attempt to chip away at pesticide preemption laws in state legislatures.

- **Arbitration and Non-compete Clause Bans:** Arbitration clauses in consumer contracts benefit the industry for three primary reasons: time, cost, and confidentiality. Several bills across the country have been introduced this session, and none have passed.
INVEST IN YOUR FUTURE

We promote, protect, defend and grow your business by:

- Increasing awareness of your role as protectors of public health and property
- Growing the market through consumer education and awareness
- Counteracting national and local activist efforts

npmapestworld.org/ppma/get-involved/
PPMA IS TELLING YOUR STORY

4.7 M ORGANIC SOCIAL MEDIA IMPRESSIONS
A 45% INCREASE FROM 2016

1,655 CONSUMER MEDIA PLACEMENTS

92,457 BROADCAST PSA AIRINGS

2,048,506,660 TOTAL IMPRESSIONS IN 2017

4.5+ MILLION UNIQUE VISITORS TO CONSUMER SITES
TINY TERMITE HOUSE
SAFETY FIRST PSA
QP PROMOTES PROFESSIONALISM

We help grow your business and improve your services through:

- Training and certification
- Hiring forms and policies
- Providing consumers protection and confidence when selecting a nationally accredited company

npmaqualitypro.org  f/npmaqualitypro

National Pest Management Association
QualityPro sets the standards of excellence for professional pest management companies and their employees through education, training and certification, providing consumers protection and confidence when selecting a nationally accredited company.
INVESTING IN RESEARCH

**UC Riverside Project**
- Evaluation of outdoor applications of insecticide baits as alternative management tactics for peridomestic nuisance cockroaches

**UC Davis Project**
- Can rodenticide toxicosis be mitigated by changes in management practices? Examination of two different bait stations, their placement, visitations by small mammals and birds, and their interaction with mesocarnivores.

**Auburn University Project**
- Effects of house and landscape characteristics on the abundance and diversity of perimeter pests

**Fordham University Project**
- Rats follow their nose: Using social structure and scent origins to produce new tools for urban pest management
GET INVOLVED!
MENTOR MATCH

• Get Involved
• Be a mentor
• Recommend to colleagues at your state level they can join the program and find a mentor to teach them how to be successful!
UPCOMING EVENTS

THE NATIONAL PEST MANAGEMENT ASSOCIATION PRESENTS

PESTWORLD 2018
OCTOBER 23–26
ORLANDO, FLORIDA
CONNECTED INSPIRED EDUCATED

GLOBAL BEDBUG SUMMIT
November 27-29, 2018 • Denver, CO
Presented by
Sponsored by
NPMA
National Pest Management Association
BedBug CENTRAL
OUR MISSION IS YOUR PROTECTION.

THANK YOU.

DOMINIQUE STUMPF, CAE, CMP
EMAIL: DSTUMPF@PESTWORLD.ORG

THE FUTURE IS BRIGHT