

June 2012



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# In Brief

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*Innovise*



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## Welcome to i-FM in Brief

One of the key characteristics of facilities management, making it both a vitally important business discipline and an attractive career opportunity, is the wide range of responsibilities normally included within the remit.

OK, some of those responsibilities are less glamorous than others – and certainly many people might propose pest control for the less exciting end of the scale. But consider what a pest infestation could do to your business: anything from upsetting staff and customers, through damaging your IT and building services, to destroying products or tools of the trade. Not a prospect to be taken lightly – and therefore an action area to be taken very seriously.

The feature articles and commentary we have included here will help ensure you stay on the right track.

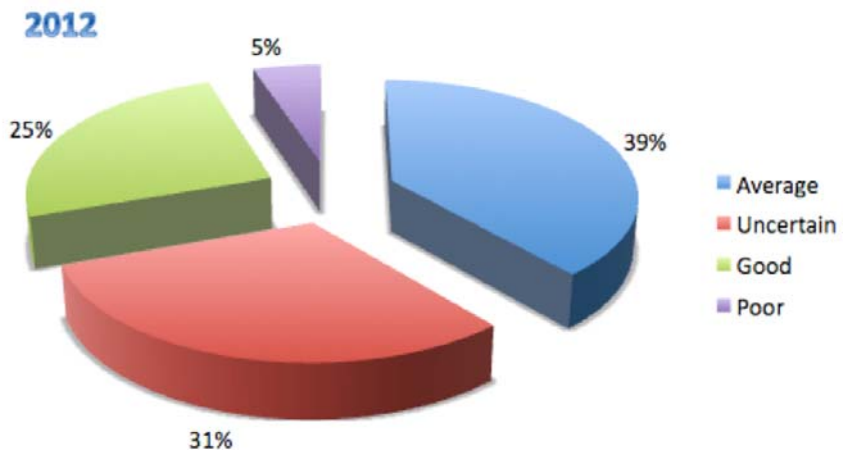
Pest control is also the subject of our latest FM Briefing, now available on our website: [www.i-FM.net](http://www.i-FM.net). FM Briefings are published regularly throughout the year, each one focusing on a key area within facilities management. Past briefings have looked at CAFM, cleaning, catering, security and more. The programme for 2012 now moves on to lifts & escalators, FM Procurement and FM Consultants.

Whatever your role in FM, you can count on i-FM to bring you the information you need - and the opportunity to get more involved in the industry - through news, features, comment, insights and advice.

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David Emanuel - MD i-FM.net

## Caution prevails across FM



*Two-fifths of facilities managers describe the current business environment as 'average'. But almost a third still call it 'uncertain'. And there is little confidence that companies will be seeing much growth until late this year, or even early next.*

Caution prevails - but, compared to Q1 2011, these new figures from the i-FM Business Confidence Survey represent some shift towards the positive.

In the comparable period last year, less than a third of survey respondents were calling the business environment 'average', with the largest proportion – over two-fifths - labelling it 'uncertain'.

The annual i-FM Business Confidence Survey also asks about expectations for change in turnover and order book value, as well as staffing plans. On the latest data, all indicators point to challenging market conditions persisting through the mid-year period, with confidence in improvement growing for the latter part of the year and into 2013.

When we asked about the primary concerns at their organisations – the things that are keeping them awake at night – FMs said that winning new business topped the list, followed by improving margins and reducing

overheads. Other key issues include availability of finance, low confidence levels, high competitive pressures, and uncertain government plans.

At a personal level, individuals appear to be as cautious as their employers. Over half are not looking to change jobs at this juncture; and another 30% might consider it but are not doing anything about it. 60% said they do not expect to receive a pay rise this year – which is actually an improvement on last year's 72%.

Commenting on the survey results, i-FM Managing Director David Emanuel said: "There appears to be little prospect of an 'Olympics bump' for the UK facilities management industry. Confidence levels have picked up somewhat over last year, but caution remains the watch-word and there is little expectation of real improvement in market performance until late this year or early next."

And industry perceptions seem to be changing, Emanuel added: "It may well be that some of the improved view of the state of the market that we are already seeing represents companies adjusting to a new 'normal' – to some extent, what looked like uncertain last year has this year come to be seen as average."

The 2012 i-FM Business Confidence Survey report is available on [www.i-FM.net](http://www.i-FM.net) (to full licence holders only).

# Pest Control: Strategies and Best Practices



*Richard Moseley, Technical Manager,  
British Pest Control Association*

Pests and the control of pests are often highlighted in media circles with a 'quirky' news article covering topics from giant rats and foxes to the closure of shops in New York due to bed bugs.

However, such information only helps to detract from the technical complexities that are faced by pest controllers on a daily basis on an enormous variety of sites. Simplistic reflections of the pest industry also detract from the training and ability of professional pest controllers, and detract from the key working relationships that must be developed between contractor and customer to guarantee pest-free environments.

It is always prudent to remind ourselves about why we actually need to control pests, and why we often need to put the control process in the hands of a proactive

pest control company.

Many of the pest species that we deal with are what we term 'public health' pests. This means that they have the potential to spread infection and disease due to the conditions in which they live or the fact that they carry pathogens within their bodies. One of the best known examples of pest-borne disease is Weil's disease (leptospirosis) which is carried in the urine of rats. Weil's disease presents with flu-like symptoms, but can be ultimately lethal. Flies, cockroaches, tropical ants, mice, birds and foxes can all transmit illness to humans, making the role of the pest control specialist vitally important.

Disease is not the only prompt to maintaining a pest-free environment. Pest species can cause heavy structural and commodity damage due to their habits and characteristics. Rodent species must continually gnaw to wear their incisor teeth back as they grow

throughout the life of the animal. This means that as well as damaging foodstuffs during eating, rodents can gnaw through gas pipes, electric cables and water tanks, resulting in fire, flood and even explosion. Birds too cause massive issues as the acidic nature of their droppings will strip the stonework of buildings. Bird nesting sites can also act as a reservoir of insect infestation, with fabric-damaging pests such as the clothes moth and carpet beetle thriving amongst bird waste.

The threat of disease and damage should prompt FMs to strongly consider a proactive pest control contract as it will help protect the other services that they provide. If you are not convinced, consider the bad reputation and loss of business that can be caused by reports of pest activity - and that many staff members may have a genuine fear of pests. A proactive contract is a form of insurance that you simply cannot afford to ignore.

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However, do not think, as some companies do, that by putting your pest prevention in the hands of a professional company you no longer have a role to play in the prevention of pests on your sites. The most successful pest control contracts incorporate a strong partnership between the customer and contractor to ensure a pest-free environment. A good pest control technician will continually draw the site contact's attention to potential risk, such as hygiene defects that will attract pests, gaps that may encourage pest intrusion or the storage of goods that will help hide pest activity. Pest controllers do not have magic wands – they need the support of site to control and prevent pests; and if the site ignores the advice of the pest controller, on their head be it.

The partnership between pest control contractor and the customer is part of an integrated approach that can be used to maximise the effectiveness of the pest control professional. A well educated site that understands the impact of pest infestations will respond rapidly to pest activity and ensure it is controlled rapidly by the pest control contractor. Every pest controller knows that a rapid and early response to pest activity is vital to ensure such activity is eliminated before damage is done to the customer's product, site and staff. Common sense also dictates that smaller infestations are not only quicker to control, they also require less pesticide and are less likely to disrupt the site staff with intensive and intrusive treatment procedures.

The use of an integrated approach to pest prevention and control is often termed 'integrated pest management' (or IPM), but this is a phrase often used in the pest industry without necessarily being properly understood. In fact, IPM is not a new concept. It has been around for literally 1000s of years since the first cultivators of crops

realised that rotating certain crops would help control pest damage to the food they were growing. In the public health arena, IPM involves pest controllers and contractors using every tool at their disposal to ensure thorough pest prevention and complete pest eradication. Eradication should begin with non-chemical control measures such as good hygiene, the removal of nesting sites and sealing of gaps offering pest entry. Such measures can then be complemented with targeted use of pesticide chemical controls applied with safety and environmental concerns in mind.

A vital part of integrated pest management is the maintaining of control. This is achieved by the regular monitoring of sites by a pest control company. Routine monitoring in the form of regular planned inspections offers customers an 'early warning system' to protect their sites, products and staff from pest damage. Monitoring may be carried out, coupled with non-toxic rodent baits and insect monitoring points that can be replaced with pesticides where pest activity is noted to eradicate pest infestations.

Sites should seriously consider the use of a reputable pest control contractor to monitor and protect their interests.

When you use a reputable contractor, such as those available through the British Pest Control Association, you are not simply 'buying in' access to large amounts of professional use pesticides. You are in fact buying in to the knowledge, experience, training and insurance of a pest company dedicated to keeping your working environments pest-free.

If you would like further information on reputable pest control providers, pest prevention, model contracts or membership, please contact the BPCA on 01332 294288, or visit our website at: [www.bpca.org.uk](http://www.bpca.org.uk).



# UK Pest Control – a £330m growth market

Frank Proud is a Director of market research firm Apex Insight

The UK pest control industry has continued to grow through an uncertain economic period coupled with changes in regulation and working practices. Member surveys carried out by CEPA (the European pest control trade association) and figures from the market leader, Rentokil, support our estimates made for a recent study of the market that it is around £330m in size.

As might be expected, the sectors which involve the manufacturing, serving and selling of food account for a significant proportion, with pests in the home being just under a fifth.

The market has grown at a rate of over 4% per year, mainly as a result of more technician visits being carried out. However, price increases have also been achieved by passing on inflationary cost increases as well as the requirement to switch to more expensive products to meet the terms of the recent Biocidal Products Regulations.

## What factors drive the market?

Perhaps counter-intuitively, one thing which appears not to have much relationship to the size or growth of the market is the actual quantity of pests.

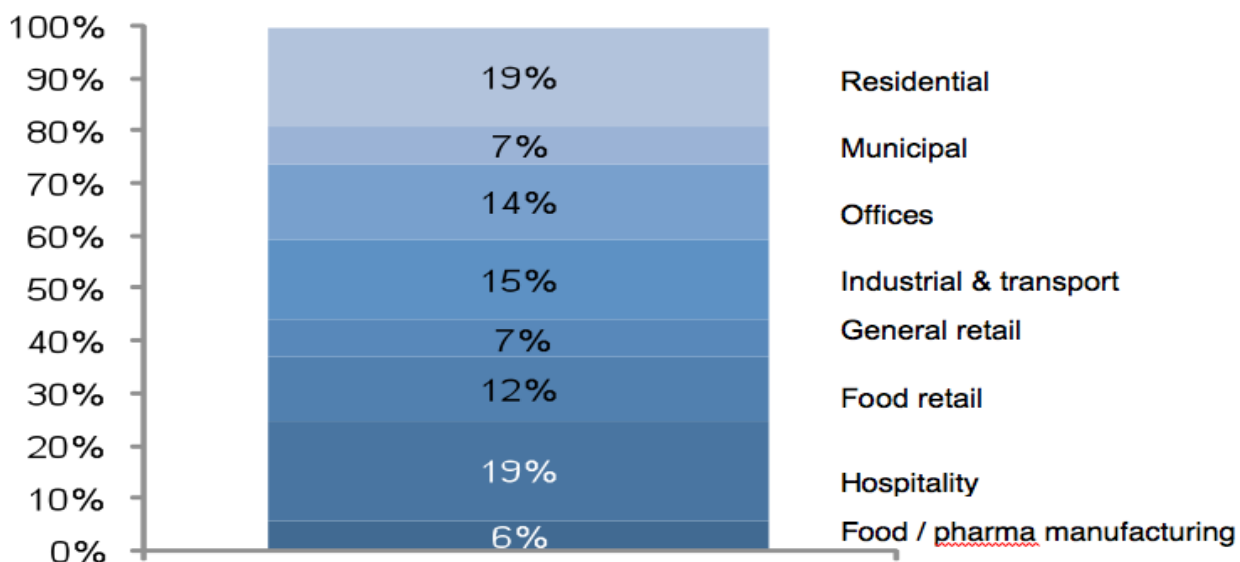
For individual pest types there are peaks and troughs in activity from season to season and year to year, depending on the weather. There is generally a peak of activity in the spring and summer months, when insects such as wasps and ants tend to find new nests, and a degree of unpredictable volatility with, for example, greater risk of rats and mice coming into premises when temperatures drop. However, such variations affect reactive, rather than preventative, pest control activity and, most believe, they tend to average out over longer periods rather than indicating trend increases in quantities of pests.

For the householder segment the main change is that people are much less tolerant of pests in the home than in the past and are therefore increasingly likely to call for help from a contractor rather than put up with an infestation.

Compared to other European countries, the UK is a large market with only Sweden, where labour costs are high, spending more per head on pest control. Despite pests being more prevalent in warmer climates, the markets in southern European countries are relatively smaller. We believe the northern markets are larger because they are more mature, having moved further towards a proactive, insurance-type service rather than reactive pest-catching.

Added to this, key customer segments, such as hospitality and food retail, are more consolidated in markets such as the UK. This is important because the larger chains are more likely to purchase high service level contracts than are independent operators. In particular, restaurant chains which use a franchise model, such as Subway, Costa Coffee and McDonalds, tend to insist on franchisees being covered by their master agreement for pest control to minimise the risk of reputational damage to their brand from a local incident.

Pest control market segmentation by type of customer / % of market value



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To understand why the market has grown in the past, and what implications this might have for the future, we believe that, rather than looking at trends in pest volumes, four key drivers are important:

- Total number of premises needing pest control
- Proportion of premises covered by pest control contracts
- Typical level of service provided under a contract
- Average price paid per contracted technician visit.

## Market driver trends

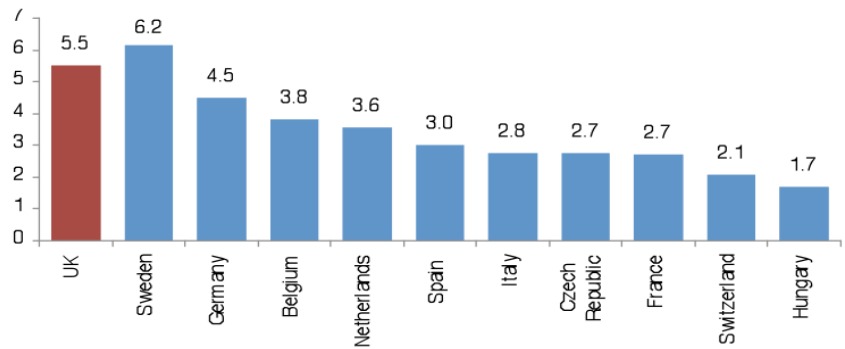
The types of premises with the biggest requirement for pest control work are large-scale food production facilities. These sites, which can be magnets for many types of pest, must demonstrate high standards of hygiene. Many studies show that the consumption of processed and convenience foods continues to grow and, reflecting this, the UK food manufacturing industry has grown in recent years at a rate of 5%, significantly above inflation.

Hospitality outlets are also very important. The number of restaurants in the UK has fallen slightly in recent years due mainly to pub closures (more than 7,000 pubs have closed since 2006) which has offset smaller increases in other restaurant types. However, the number of hotels has increased and, favourably for the pest control industry, this has been due to the expansion of the budget hotel chains, such as Travelodge and Premier Inn, rather than independent or family-run hotels.

Food retail sales have increased at 4% per year. This is above average inflation levels with at least a part of this growth having come from ongoing store openings by the major grocery chains such as Tesco and Sainsbury's.

While the construction industry has slowed of late, there have been increases in the total quantity of

International comparisons: pest control market size relative to population / £ per head



other types of commercial property, such as offices and warehouses, and also in housing, where the proportion of new homes built in larger blocks of flats – which are far more likely to be covered by a pest control contract than standalone houses – has increased to meet the needs for more efficient land use.

Penetration of full service level pest control contracts is already close to 100% for food production sites and retail / hospitality chains.

Nevertheless, we expect growth because the chains are continuing to increase their share relative to independents. Increased penetration in non-food sectors, such as offices, is also likely.

Pest control contracts typically specify a certain level of work to be carried out, such as the number of visits to be made to each site and the reports which must be completed. New reporting requirements or working practices required by legislation, such as the Biocidal Products Regulations, have led to step increases in the scope of contracts. Lack of a comparable new set of regulations on the horizon implies service level growth could be slower in future. Nevertheless, the efforts of the industry in promoting its vision of best practice should ensure some growth as customers gradually upgrade their contracts in response.

The average price paid per technician visit appears to be largely driven by inflationary increases but new regulations, such as Biocidal Products, have had some impact by

phasing out some of the cheaper but more harmful products, requiring more expensive substitutes. In the lower inflation environment forecast by economists and without another piece of significant legislation on the horizon, we expect price increases to be lower in future.

## Outlook and risks

We believe that the factors above indicate that the pest control market should continue to grow, although more slowly than in recent years.

While the market is not particularly cyclical, an improving macroeconomic outlook is welcome especially to the extent that it supports recovery in construction activity in key customer segments and hence demand for pest control services. A risk for the industry is that, if recession becomes more drawn out, construction of new premises such as hotels and office space might slip back.

Price rises may be under threat if the extent to which pest control is bundled with other facilities management services in the same contract increases significantly. Currently, the leading pest control operators appear to be more profitable than providers of many other facilities management services but increased bundling could see pest control margins tend towards those levels, implying lower prices.

*UK Pest Control: Market Insight Report was published February 2012 by Apex Insight.*

[www.apex-insight.com](http://www.apex-insight.com)

# The Serious Business of Pest Control



*Anyone walking across London's Victoria Station earlier this year might have been in for a surprise. One pest control firm installed a 6x4 metre floor vinyl artwork depicting a hole in the station concourse out of which rats dressed in suits were climbing. The stunt was aimed at encouraging people to leave the rat-race and take on a pest control franchise. But it's not just in the marketing departments of pest control firms that innovation occurs.*

A widespread increase in pests has led to some innovative approaches to their eradication, explains Louis Fordham, General Manager at pest control experts SitexOrbis. "New products are changing the way pest control is performed. For example, rather than use spikes, which are unattractive, to deter pigeons, we have just started using a new gel to discourage pigeons from ledges and roofs. It has an orangey glow which makes the pigeon think the building is on fire. And with a four-year lifespan, the gel is cost-effective in terms of maintenance."

## **Technology change**

Another new technique for ants and cockroaches is to use a gel, rather than the typical sticky pads or sprays. "The pests love the gel: they eat it and then go back to the nests where they die. Other pests then eat the dead body and are in turn killed by the gel. One drop of this gel can kill up to 50 cockroaches," Fordham explains.

Phil Shaw, Divisional Director, Pest Control at Servest Multi Service Group, also points to product innovation as being a key industry trend. He cites the example of dealing with moths and insects in furniture and furnishings.

"Traditional fumigation used to involve removing the item from its environment, placing it in a secure area and putting under a bubble, where it was then fumigated using traditional fumigation toxic methods. This would take a number of weeks and was very expensive. But now a new process has been developed called anoxia, whereby

the insects are starved of oxygen."

Shaw explains that items can be placed inside a specially-designed pocket made of space blanket material; 'scavengers' are placed inside (these are iron filings, similar to those used in handwarmers); the pocket is then sealed up and the scavengers are heated, depleting the atmosphere of oxygen. The piece is left in the pocket for several days and all the insects and eggs - however deep into the wood or fabric they are - will die as the oxygen goes.

"This is particularly useful for stately homes and museums which have a number of large pieces of furniture or artifacts which may attract woodworm and many expensive fabrics such as curtains, which can be taken down after the visiting season, placed in oxygen-starved storage on-site, and then taken out in the spring pest-free," Shaw continues. "It is also much safer than traditional fumigation as it can be done on-site: there are no chemicals involved, so people aren't at risk."



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The pressure to reduce energy bills and carbon footprints is also making its mark on the pest control sector. Electronic fly killers in food environments typically attracted flies by a UV light and then electrocuted them. But there was a concern that the fly was broken into hundreds of segments and particles could have dropped from the unit. The units were also expensive to run, costing between £110 and £135 per annum. Now these units use more traditional glue boards behind the UV light, which reduces the energy use (down to about £35 pa) and also ensures particles cannot contaminate the environment. The unit itself is transparent ensuring the UV light penetrates further and attracts more flies, meaning that fewer units are required.

### Seasonal change

Pest control is above all a seasonal business. Changes in temperature at this time of year bring out creepy crawlies - from ants, cockroaches and flies to bed bugs and midges. And the pest season is getting longer.

“Milder winters, where it might only be really cold for short spells, mean that many pests are continuing to live outside and breed and not die off. Insects are coming out earlier and staying for longer. Typically we would be dealing with wasps from May or June till October. Last year, I

did my first wasp treatment in the first week of March and my last towards the end of November,” says Shaw.

Pest control also varies by geography. London is a major problem for pests such as rats and mice because of the Tube and the antiquated sewers. “Sit outside a station after the Tube has stopped running in the early hours of the morning and you will see rats and mice literally pouring out of the gates hunting around for the rubbish left on the street for collection the following day,” he adds.

### Bugs and beasties

The types of pests are changing as a result of climate change, too, as well as the increase in foreign travel and changes in lifestyles. For example, grey squirrels are on the increase and are becoming very aggressive, says Louis Fordham.

“They can cause thousands of pounds of damage in a building from chewing through electrical cables, to the fabric of the building and equipment such as computer screens – they love anything hard,” he notes.

In Hampshire and Kent, a new black squirrel is also on the rise and is threatening to supersede the grey squirrel. Seagulls are on the rise in inland areas, too, attracted by food

sources. And the London 2012 Olympics will cause a big rise in bed bugs if the Vancouver and Sydney games outbreaks are anything to go by. Already the capital is thought to have experienced a threefold increase in bed bug activity this decade, but this summer’s plague could be of biblical proportions.

“Unless there is a prolonged cold snap immediately after the Olympics, which kills off the new insect arrivals, we could find ourselves dealing with some new and different pests,” warns Shaw.

### Law and order

Just as hazardous as treating the problem are the legalities around pest control. This year, two pest controllers were jailed for four months and each fined £7,000 for poisoning wildlife at a park after using a pesticide without approval, contrary to the Control of Pesticides Regulations 1986. Also this year, a West Norfolk pest controller was fined £1,000 for keeping pesticides in an unlocked garden shed. Norfolk police officers found nine containers of aluminium phosphide, a moisture-activated gassing compound, which produces a very toxic gas that can be deadly.

Following changes in legislation, there is a danger that pesticide users can easily find that treatment



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processes that were perfectly legal previously are now considered illegal, explains Richard Moseley, Technical Manager at the British Pest Control Association, which celebrates its 70th anniversary this year.

“Second generation anticoagulant rodenticides are coming under attack from both the Health and Safety Executive and the European Commission, neither of which has allowed a thorough consultation process to take place. Active ingredients that are passing through the Biocidal Product Regulation registration process are subject to different label instructions than products that were registered under the Control of Pesticides Regulations. This means that pesticide users must ensure that they regularly read the labels of their products,” Moseley explains.

He cites the example of the recent instruction by HSE that where rodenticide is used in a public area, the treatment area must be marked during the treatment period with a notice explaining the risk of primary and secondary poisoning. Instruction regarding measures to be taken in case of poisoning must now also be on the signage of the treatment area.

Neglecting to document work done is another danger. Last year, a director of housing, regeneration and environment at a London council, was threatened with jail for contempt of court for allegedly failing to have the council deal with a pharaoh ant infestation in a tenant’s home. The council had not carried out work as the pest control team had difficulty accessing

neighbouring properties. But even if measures had been taken, without an audit trail the council would have had a considerably weakened defence.

And the situation looks likely to deteriorate. Thanks to councils’ reduced budgets, pest control treatment levels are falling across the country. Just under 400,000 local authority rodent treatments were conducted across the UK in 2010/11 – 10% less than 2009/10 and barely half the level of 2005/6, according to the 12th annual National Rodent Survey Report from the National Pest Technicians Association and BASF Pest Control Solutions.

“Failure to stem this decline will leave enforcement action as the only way of tackling rodent problems in many parts of the country,” argues Peter Crowden, the NPTA’s Chairman. “As well as proving more costly overall than timely infestation control, this seems certain to allow rat and mouse populations to escalate to an extent that may pose a serious threat to public health. We urge all those with the power to intervene to appreciate the seriousness of this situation and take steps to address it before it is too late.”

Pest control is clearly a serious business.



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A carefully selected expert panel of speakers shared their own experiences, views and insights on a range of topics around this theme earlier in the year. The White Paper, available now, builds on this invaluable material.

Facilities Management: new needs, new solutions? provides a platform for each conference speaker to share their own experience and offer guidance in new, specially commissioned feature articles. Property and the workplace, building services, facilities services, and FM – the glue that holds it all together – are all covered.

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The annual Workplace Futures conference has become a landmark in the UK facilities management calendar. The 2012 event applied the characteristic Workplace Futures triple focus on the current market situation, emerging trends and future opportunities.

Under the theme 'new needs; new solutions?', the conference was shaped around some of the central challenges facing UK FM as it begins to reach some maturity. The essence of that theme was this: FM is a business discipline and a vast service industry. It is a simple service delivery requirement and a mission-critical support operation.

Given that huge range, what does the future hold - more of the same? Or something quite different? Is FM ready to face up to the big challenges and define its own future?

A carefully selected expert panel shared their own experiences, views and insights on a range of topics around this theme in February 2012.

This paper captures that invaluable material.

manage the move to a new HQ in support of growth? Who knows which buildings in a portfolio are the most energy efficient and what can be done to improve the poor performers? More often than not, the answer in each case is the facilities manager.

As we emerge slowly from some of the most difficult economic times in living memory, it is clear that the world has changed for facilities



Facilities management is a big, diverse and maturing area of business. Tactical in its day-to-day operations, it is nevertheless closely related to - and often deeply involved in - strategic planning and decision making at private and public sector organisations alike. Who is responsible for ensuring the workplace is clean, safe and fully compliant with all relevant legislation? Who can plan and implement the consolidation of accommodation resources; or

management. Extraordinary change was already underway, in such areas as technology, demography, work methods and the environment / sustainability nexus; but deep recession has reshaped client needs and expectations.

FM has been a true success story over the past two decades. To continue on that path, it must continue to demonstrate understanding, flexibility and determination.

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