

IPM AND GREENHOUSE CONSTRUCTION COMPANIES

Prepared by:

CPL Business Consultants
Innovation Centre, Milton Park, Abingdon,
Oxfordshire, OX10 8BA Tel: +44 1865 257 057
info@cplconsult.com, www.cplconsult.com

Dr Ray Quinlan
Dr Steve Lisansky

STRATEGIES TO GROW YOUR BUSINESS

TABLE OF CONTENTS

| | |
|---|-----------|
| EXECUTIVE INTRODUCTION | 1 |
| OBJECTIVE..... | 1 |
| METHOD..... | 1 |
| CONCLUSIONS AND RECOMMENDATIONS | 1 |
| <i>Specific companies</i> | 1 |
| <i>Strategic approach</i> | 2 |
| PRODUCERS OF BENEFICIALS: PARASITES, PREDATORS AND POLLINATORS..... | 4 |
| SUMMARY..... | 4 |
| THE BUSINESS | 4 |
| WHO ARE THEY? – COMPANIES | 4 |
| THE BIG THREE – WHAT THEY PRODUCE, WHERE & HOW THEY SELL, REPUTATION | 7 |
| <i>3 companies</i> | 7 |
| OTHER SIGNIFICANT COMPANIES..... | 14 |
| <i>4 companies</i> | 14 |
| PRODUCERS OF BIOLOGICAL / MICROBIAL PESTICIDES..... | 19 |
| SUMMARY..... | 19 |
| THE BUSINESS | 19 |
| WHO ARE THEY? – COMPANIES | 19 |
| THE BIG TWO – WHAT THEY PRODUCE, WHERE & HOW THEY SELL, REPUTATION | 26 |
| <i>2 companies</i> | 26 |
| OTHER SIGNIFICANT COMPANIES..... | 28 |
| PRODUCERS OF TRAPS, LURES, LIGHTS & SIMILAR DEVICES..... | 30 |
| SUMMARY..... | 30 |
| THE BUSINESS | 30 |
| WHO ARE THEY? – 34 COMPANIES | 30 |
| SIGNIFICANT LURE AND TRAP COMPANIES – WHAT THEY PRODUCE, WHERE & HOW THEY SELL, REPUTATION..... | 33 |
| <i>3 companies</i> | 33 |
| OTHER SIGNIFICANT COMPANIES..... | 34 |
| GREENHOUSE CONSTRUCTION COMPANIES | 36 |
| SUMMARY..... | 36 |
| THE BUSINESS | 36 |
| <i>List of Greenhouse Construction Companies</i> | 36 |
| <i>What Materials are Usually Specified and How Often?</i> | 40 |
| <i>Influence of Selection of Netting</i> | 40 |
| <i>Who Makes Decisions about What Materials to Use?</i> | 40 |
| <i>How is the Purchase Made?</i> | 41 |
| <i>How does the Company Learn about New Products and What Evidence is Needed?</i> | 41 |
| FRANCE: WHO ARE THE COMPANIES: WHAT THEY PRODUCE, WHERE & HOW THEY SELL, REPUTATION | 42 |
| <i>4 companies</i> | 42 |
| ISRAEL: WHO ARE THE COMPANIES: WHAT THEY PRODUCE, WHERE & HOW THEY SELL, REPUTATION | 48 |
| <i>3 companies</i> | 48 |
| ITALY: WHO ARE THE COMPANIES: WHAT THEY PRODUCE, WHERE & HOW THEY SELL, REPUTATION..... | 50 |
| <i>6 companies</i> | 50 |
| SPAIN: WHO ARE THE COMPANIES: WHAT THEY PRODUCE, WHERE & HOW THEY SELL, REPUTATION..... | 52 |
| <i>10 companies</i> | 52 |
| TURKEY: WHO ARE THE COMPANIES: WHAT THEY PRODUCE, WHERE & HOW THEY SELL, REPUTATION | 58 |
| <i>5 companies</i> | 58 |

TABLES

| | | |
|----------|---|----|
| TABLE 1 | PARASITE AND PREDATOR COMPANIES IN THE KEY COUNTRIES* | 4 |
| TABLE 2 | COMPANY 1 BENEFICIAL INSECTS, MITES AND NEMATODES | 7 |
| TABLE 3 | COMPANY 2 BENEFICIAL INSECTS, MITES AND NEMATODES | 9 |
| TABLE 4 | COMPANY 1 AND 2 PRODUCT DISTRIBUTION | 11 |
| TABLE 5 | COMPANY 3 BENEFICIAL INSECTS, MITES AND NEMATODES | 13 |
| TABLE 6 | COMPANY 4 BENEFICIAL INSECTS, MITES AND NEMATODES | 14 |
| TABLE 7 | COMPANY 5 BENEFICIAL INSECTS AND MITES | 16 |
| TABLE 8 | COMPANY 6 BENEFICIAL INSECTS, MITES AND NEMATODES | 17 |
| TABLE 9 | COMPANIES SELLING BIOPESTICIDES IN THE KEY COUNTRIES* | 19 |
| TABLE 10 | COMPANY 7 PROPRIETARY PRODUCTS | 27 |
| TABLE 11 | COMPANY 8 BIOSCIENCES PROPRIETARY PRODUCTS | 28 |
| TABLE 12 | BIOPESTICIDE PRODUCTS DISTRIBUTED BY COMPANY 9 | 29 |
| TABLE 13 | COMPANIES SELLING TRAPS AND LURES IN THE KEY COUNTRIES* | 31 |
| TABLE 14 | GLASSHOUSE CONSTRUCTION COMPANIES IN THE KEY COUNTRIES* | 36 |
| TABLE 15 | COMPANY 10 PLASTIC GREENHOUSE RANGE | 43 |
| TABLE 16 | COMPANY 10 GLASS GREENHOUSE RANGE | 43 |
| TABLE 17 | COMPANY 11 DISTRIBUTORS | 46 |
| TABLE 18 | COMPANY 12 ANTI-INSECT NETTING PRODUCTS | 55 |
| TABLE 19 | COMPANY 13 DISTRIBUTORS | 56 |
| TABLE 20 | COMPANY 14 ANTI-INSECT NETTING PRODUCTS | 58 |
| TABLE 21 | COMPANY 15 ANTI-INSECT NETTING PRODUCTS | 60 |

FIGURES

| | | |
|----------|--|----|
| FIGURE 1 | COMPANY 11'S VENT PANEL SYSTEM (GREY SECTION IS NETTING) | 45 |
| FIGURE 2 | COMPANY 11'S VENT PANEL SYSTEM <i>IN SITU</i> IN A NEW BUILD | 45 |
| FIGURE 3 | COMPANY 16'S GREENHOUSES WITH ANTI-INSECT NETTING IN PLACE | 47 |
| FIGURE 4 | COMPANY 17'S GREENHOUSE WITH INSECT NET OVER PERMANENTLY OPENED WINDOWS | 49 |
| FIGURE 5 | COMPANY 18'S MULTI GREENHOUSE WITH ANTI-INSECT NETTING IN PLACE | 51 |
| FIGURE 6 | GREENHOUSE WITH ANTI-INSECT NETTING IN PLACE | 54 |