



Introducing the New CPDA

What is changing?

What is staying the same?

How can I make the organization better?



Vision

The Council of Producers and Distributors of Agrotechnology (CPDA) is the primary advocate of the generic pesticide, inert, adjuvant and surfactant manufacturer, as well as product formulators and distributors on federal legislative and regulatory issues.



A Bit of History...

- CPDA originally founded as the Chemical Producers and Distributors Association in 1975 was formed by manufacturers, small producers, formulators, distributors, associated industry suppliers and consultants who felt they needed their interests supported in a dedicated trade organization.
- In 1991 key members of CPDA wished to bring the Tank Mix Adjuvant segment into the domain of CPDA. This resulted in both adjuvant and inert companies being invited to form a new committee called the Adjuvant and Inerts Committee. This resulted in tremendous growth of the organization almost doubling the number of members.



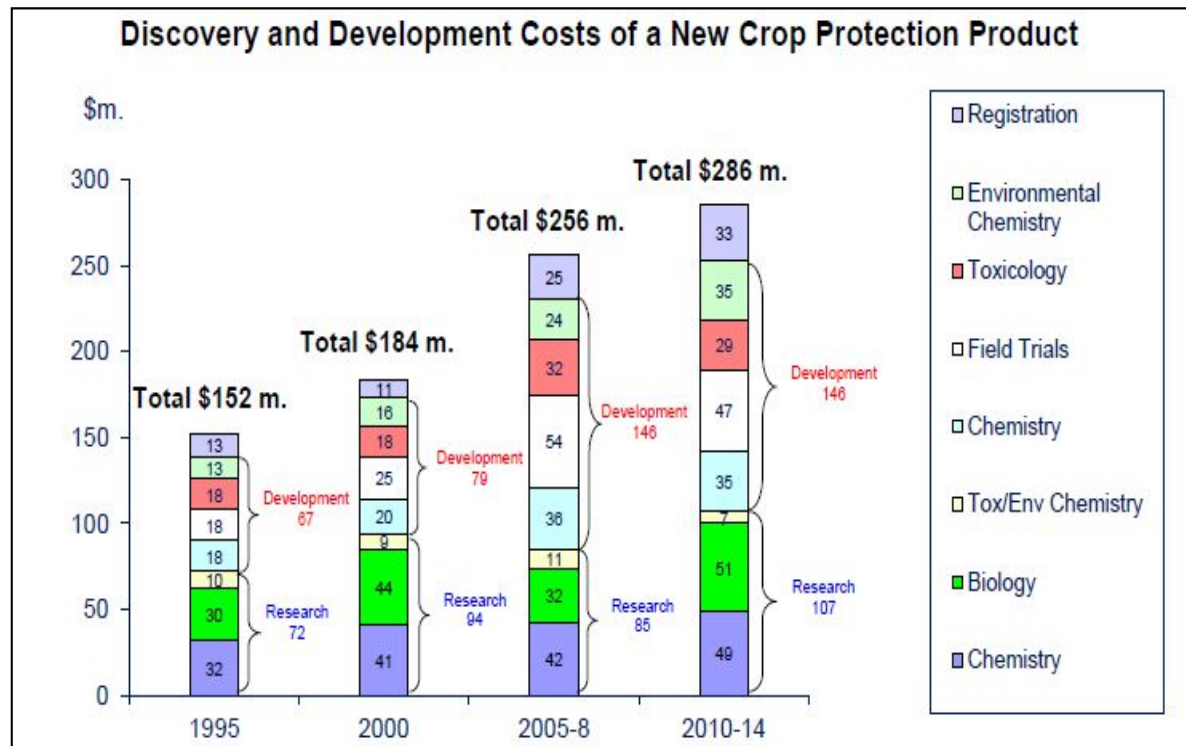
A Bit of History...

- In 2005 a group was formed to revise the long-term strategic plan for the association. Primary to this group's attention was:
 - Review of the existing Mission and Vision statement
 - Goals for membership retention
 - Develop a “glamorized” marketing plan for encouraging new members
- In 2011 several key members of the Producers membership category left CPDA in favor of CLA and another Strategic Planning session was commissioned to do the following:
 - Insure the remaining members were properly represented given that the balance had shifted to the Adjuvant and Inert Producer category which became the largest
 - Redesign the name of the organization to better represent the growing trend in Agrotechnology
 - Better define the role of the various committees



The Market is Changing

Active ingredients development is more expensive than ever



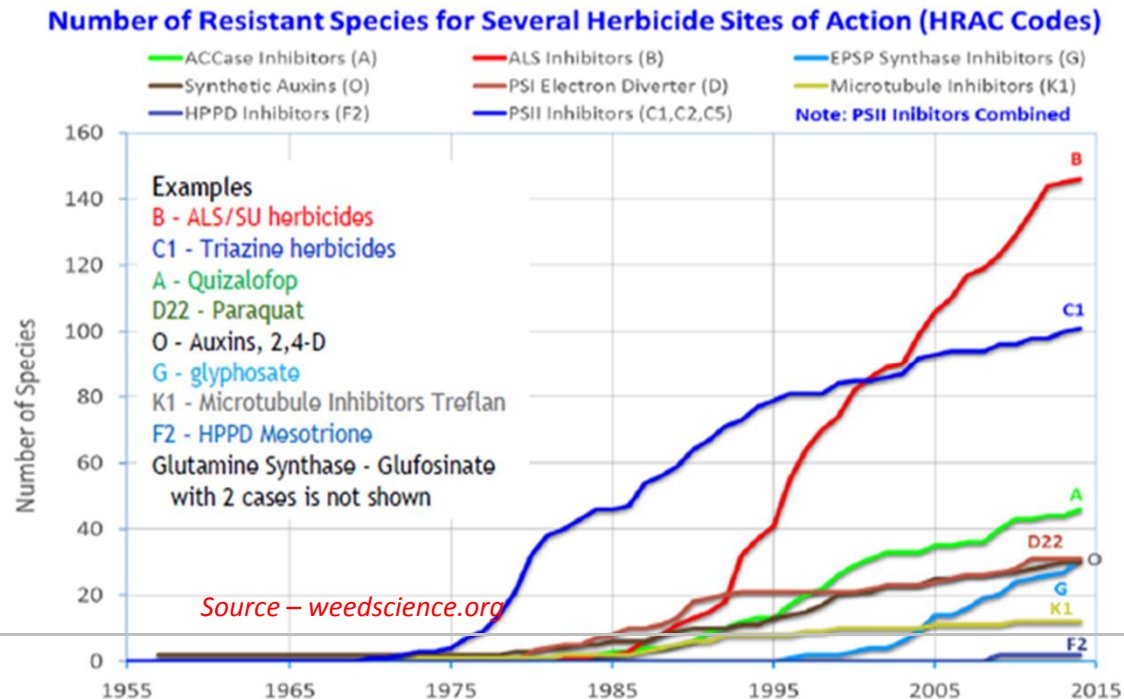
Source –Phillips McDougall

- New Active ingredients (Proprietary actives) are ever increasing in cost
- Generics are more competitive than ever
- Advocacy to support data compensation and freedom to operate are as critical as ever.



The Technology is Changing

Herbicide resistance needs advocacy to allow continued use of multiple modes of actions and adjuvants

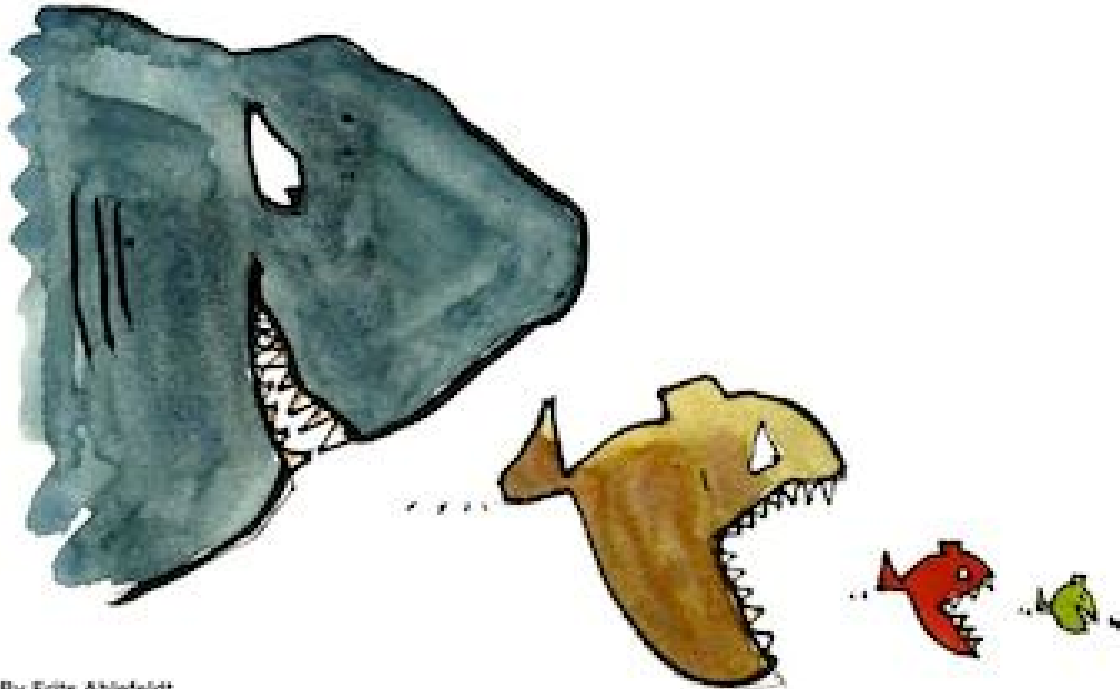


- Herbicide resistance increasing and demanding new modes of action or new combination of generic actives with multiple modes of actions.
- CPDA provides generic companies and adjuvant producers a means to advocate for the combination products and ever more efficient adjuvant products.



Industry Consolidation will have a dramatic impact on CPDA

We want to encourage Generic Manufacturers to “come back” to CPDA



By Frita Ahlefeldt

- Industry is **forecasted to grow at 2.5% per annum** over the next 5 years
- Multi-National Companies account for 75% of the crop protection market



Current Producer Member Companies

Agrochemical Sales 2016

Pre and Post consolidation and anti-trust divestments/acquisitions

Company	2016 (\$ bn.)	Merged Companies	2016 (\$ bn.)
Syngenta	9.9	Syngenta Adama	12.6
Bayer	9.5	Bayer Monsanto	12.4
BASF	6.2	BASF	6.7
Dow AgroSciences	4.6	Dow DuPont	5.9
Monsanto*	3.5	FMC	3.8
Adama	2.9	Nufarm	2.4
DuPont	2.9	UPL	2.2
FMC	2.3	Sumitomo Chemical	2.0
UPL	2.2	Arysta LifeScience	1.8
Nufarm	2.1	Albaugh	1.0
Sumitomo Chemical	2.0	Kumiai Chemical	0.5
Arysta LifeScience	1.8	Sipcam Oxon	0.5
Albaugh	1.0	Amvac	0.3
Kumiai Chemical	0.5		
Sipcam Oxon	0.5		

In order to be successful we need to build our Producers category back to previous levels

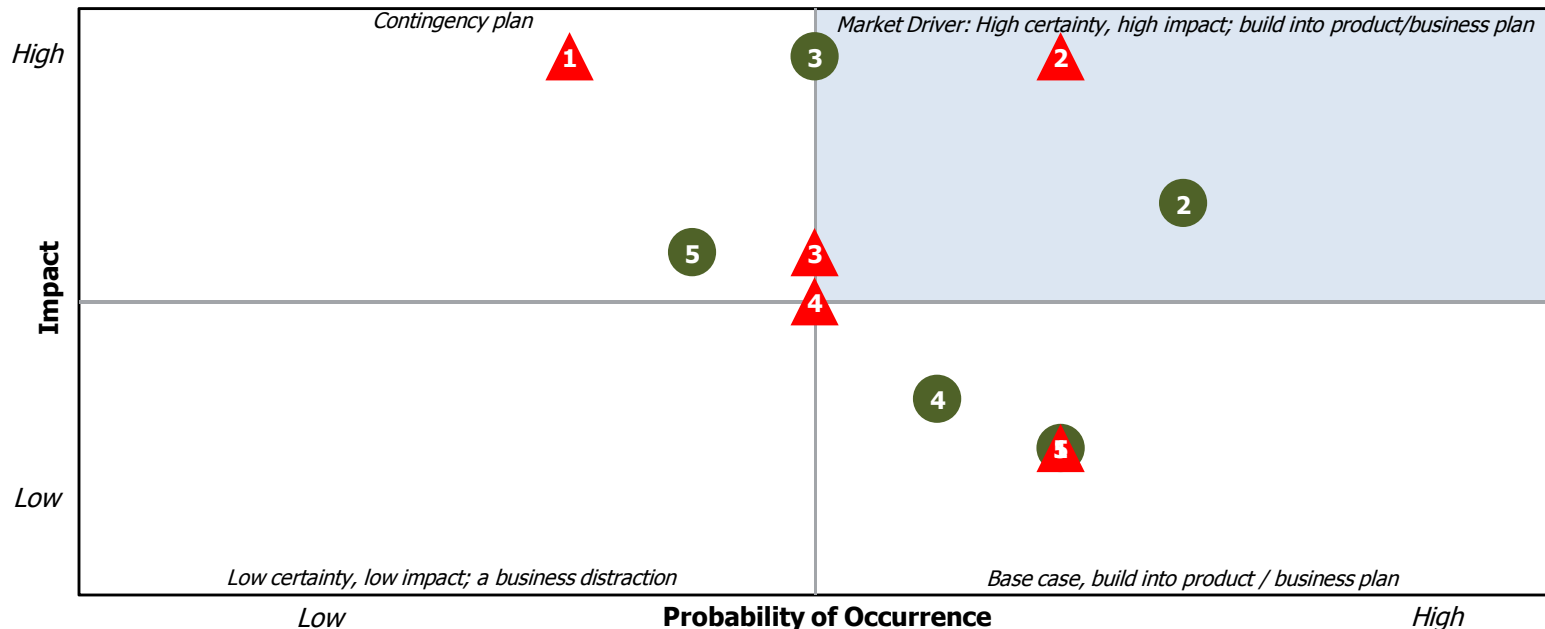
Past Member company

Current Member company

Source: Matthew Phillips 2018



All of the Change is Creating New Opportunities and Threats



- OPPORTUNITIES**
- 1 Continual consolidation of MNC
 - 2 TSCA reset (Lautenberg bill implementation)
 - 3 Reset of the organization leads to new members
 - 4 Deregulation trend
 - 5 Partnering with other trades

- THREATS**
- 1 FIFRA Adjuvant Registration
 - 2 Continuous loss of membership
 - 3 Other trade organizations
 - 4 Continual consolidation of CPDA members
 - 5 Ageing knowledge base



How Does CPDA respond to the change?

Meet the new CPDA



New Strategic Thrusts

Organize the leadership for membership growth

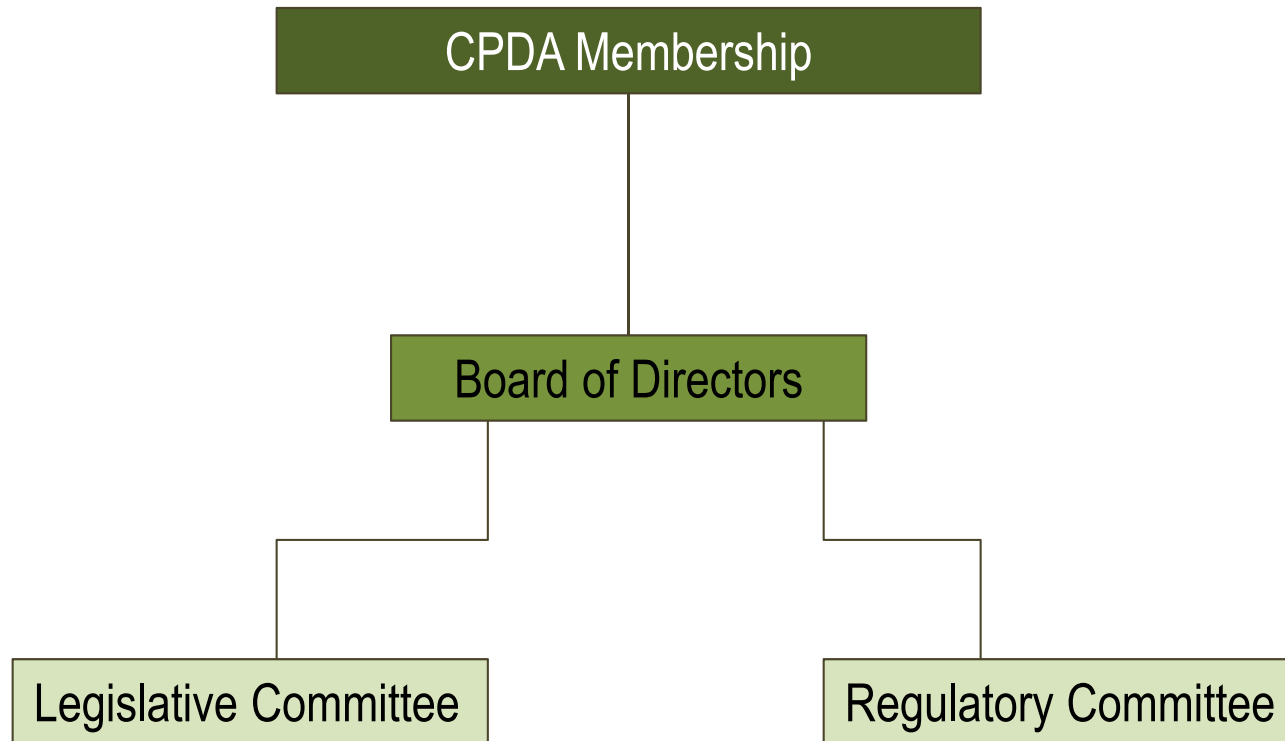
Ensure the Transparent Value to All Stakeholders

Proactively Communicate in a Timely Manner the Organizational Goals and Achievements

Quickly Identify and Prioritize Plans to Address Current and Future Issues

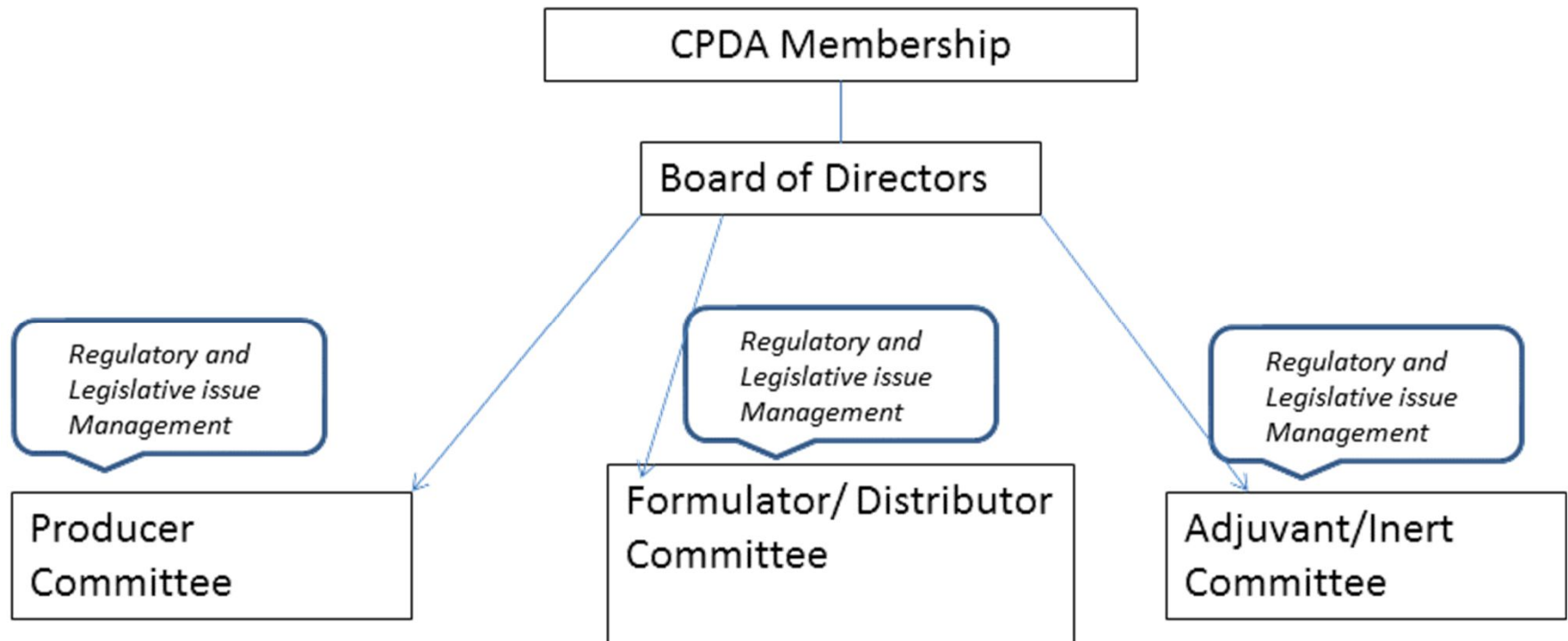


Current Structure





Proposed Structure



How would this function?

- Each member classification has its own committee
- The new committee prioritize the issues pertinent to each member classification
- Regulatory and Legislative issue Management is by each committee. Should an issue pop up in a committee which would involve multiple membership types the issue then comes to the Board for a CPDA governance policy decision
- The Board acts as the decision making body for cross-committee issues and positions as well as resolving any conflicts between committees.
- Associate members can join or participate in any/all committees
- The committees are not exclusive to the membership type and companies can choose to participate in any/all committees.



Key Focus Areas

- **Membership: Develop a HUMANISTIC focus to our members**
 - Survey membership to find out what the CPDA could do to support their company.
 - Identify and prioritize issues and/or activities.
 - Provide a report to executive committee and board to finalize to submit to the membership.
 - Listen and provide feedback, lead not demand.
 - Solicit new membership by personal contact with perspective members to understand their business.
 - Personal visits to members that would be significant dues contributors.
- **Meetings and Website**
 - Identify issues with the web site and resolve the issues related to registering for meetings. We should not have to fax in forms.
 - Develop mechanisms to enhance and promote the unique networking opportunities offered by the diversity of CPDA member companies.



Key Focus Areas

- **Events - unplanned events and issues**
 - Investigate and understand events or issues brought to CPDA attention from the membership.
 - Grow committee activity. Seek out ways to retain attract membership though the value of committees.
 - Facilitate interaction with the EPA to ensure that adjuvants are included in general DRT programs.
- **Canadian Registration of Generics and Adjuvants:**
 - Continue the drive for results.
- **Regulatory Efforts**
 - Continue to develop a strategy to impact OSHA implementation of GHS HCS 2012 labeling rule.



Let's Hear More...

The next presentations are designed to inform you of the key activities and focus of the new committees.

- Producers – Tim Stoehr of Albaugh
- Formulator/Distributors – Tim Dlabaj
- Adjuvants and Inerts – Scott Tann