Ecolab Overview

- Leading global provider of cleaning, food safety and health protection products and services
- Founded in 1923
- Based in St. Paul, Minnesota
- 26,000 associates
- $6 billion sales in 2009
A Global Winning Company
Serving Customers Around the World

- Operating in 160 Countries
- Serving Over 900,000 Customers
- Delivering One Ecolab Business Solution
  - Global Standards / Delivered Locally
  - Global Corporate Accounts
  - Global Data Management
Products and Systems for a Cleaner, Safer, Healthier, World

- Foodservice/Hospitality
- Food & Beverage Processing
- Healthcare/Infection Control
Ecolab is helping to make the world a Cleaner, Safer, Healthier place

Every day, our customers use Ecolab products to:

- Wash over 250 million dishes
- Clean over 3 million hotel rooms
- Wash over 85 million pounds of laundry
- Finish 2 million square meters of floor
- Wash over 75 million hands
- Treat over 10 million chickens to control *Salmonella*
- Clean over 8,000 miles of dairy pipeline
- Wash over 700,000 vehicles
Leading the Industry through Innovation and Expertise

Cutting-Edge Solutions

- World-class R&D facilities across the globe with regional technical centers around the world
- 750 worldwide RD&E associates, many with doctorates in microbiology, entomology and chemistry
- Food safety and public health expertise
- Over 3,000 active U.S. and Foreign patents
- Product and technology innovation driven by customer needs
- $100 million invested annually in R&D
Core Competencies

- Cleaning and Sanitizing
- Infection Prevention and Hand Hygiene
- Food Safety
- Antimicrobial
- Entomology
- Water Quality
- Kitchen Equipment Care
- Quality & Safety Audits

ECOLAB
Innovative Systems Approach
Customer Focus & Understanding

- Guest Satisfaction
- Operating Efficiency
- Employee Safety
- Environmental Issues
- Labor Turnover / Training
- Public Health Concerns
Technical Service & Training

Field Technical Support

Corporate Resources

Technical Service Lab

Microbiological Resources

Analytical Resources
Sustainability
Why is it important to Ecolab and our customers?

- It’s the right thing to do
- Consumers are demanding it
- It’s good for business
  - Increasing efficiency and minimizing consumption of natural resources reduces operating costs
Ecolab and Sustainability
The Triple Bottom Line

Economic Progress  Environmental Stewardship  Social Responsibility

- Investing in R&D to create innovative, effective products and services; helping our customers’ businesses be successful; employing people around the world
- Reducing water and energy consumption, increasing safety and reducing waste – in our own operations and for our customers
- Fair and ethical business conduct and support of our associates, communities and business partners
Our Commitment to Sustainability

Ecolab has a cross-functional, global team dedicated to driving sustainability initiatives throughout the company.

A number of associates and resources are focused on implementing a strategic sustainability plan in the following areas:

- Global Operations & Procurement
- Product Line Sustainability
- Government, Regulatory & External Relations
- Customer Support
- Sales Tools & Training
- Communications
Leadership in Sustainability

Associations
- GEMI
- Corporate EcoForum
- SDA
- IAO
- PACIA
- IHO
- ISSA
- GMA

GOs
- conserver
- National Restaurant Association
- Institute of Packaging Professionals
- CLIMATE LEADERS
- SmartWay
- NSF

NGOs
- Sustainability Consortium
- EcoLogo
- LEED
- Green Seal
- CARBON DISCLOSURE PROJECT
- Healthier Schools Campaign
- Healthy Schools Association of the Philippines
A Trusted Partner

Ecolab is continually recognized publicly and within our industry for:

- Corporate Citizenship
- Respected Business Ethics and Governance
- Being a Good Place to Work
- Innovation
- Humanitarian Efforts

American Red Cross

The Business Journal

Business Ethics

Forbes

SellingPower

Institutional Investor
2006 Black Pearl Award Recipient

- International Association of Food Protection (IAFP)
- Recognizes efforts in
  - Advancing food safety and quality through consumer programs
  - Employee relations
  - Educational activities
  - Adherence to standards
  - Support of the goals and objectives of IAFP
- IAFP Sustaining Member for more than 20 years
Sustainability in Our Own Operations

Reaching our sustainability goals is an organizational priority for Ecolab

- EPA Climate Leaders commitment - Reduce our U.S. GHG emissions by 20% per dollar sales from 2006 to 2012

- Ecolab wins 2009 Green Company Award from the Minnesota High Technology Association

- Ecolab’s Corporate Research, Development and Engineering Center awarded LEED-EB Gold Certification
Environmental Stewardship: Industry Challenges
Industry Challenges
What Does “Green” Really Mean?

- There is no global consensus definition or industry standard for what “green” means.
- There are more than 300 organizations offering third-party certifications worldwide (such as Green Seal, EcoFlower).
- Many key product categories exist without defined green industry standards.
- Majority do not consider packaging, water, energy.
Industry Challenges
Emphasis isn’t always on attributes that have the greatest environmental impact

- Many certification standards focus only on chemistry.

- The focus on ingredients is an oversimplified look at environmental impact.
  - A product may use environmentally friendly ingredients, but may take more energy to produce or may be designed with excessive packaging that will eventually end up in landfills.

- Public perception of what’s “green” isn’t always accurate.
  - Example: It takes considerably more natural resources to produce recycled-content paper bags than plastic.
Industry Challenges
Green Claims Can Be Misleading

Some products claim to be “green,” “chemical-free” or “all-natural”

The truth:

► There is not a clear, consistent definition for the term “green”

► No substance on Earth is free of chemicals

► Many “all-natural” substances are toxic
Industry Challenges
Efficacy Should Not Be Sacrificed

- Ecolab is dedicated to creating solutions that provide the best results – and protect public health – while having the lowest total environmental impact.

  - Many cleaning products can help remove dirt and germs from surfaces, but only disinfectants or sanitizers actually kill disease-causing microorganisms when used as directed.
  
  - Some “green” products do not offer protection against the viruses that cause colds and flu, or bacteria such as *Salmonella* and *E. coli*.
Total Impact Approach
The Ecolab Approach to Sustainability
Total Impact

Ecolab considers the total impact our products and practices have on the environment. This includes:

- How the use of the product will affect the use of natural resources
- How the packaging will impact the environment
- The safety of the end user
The Ecolab Approach to Sustainability
Effective and Sustainable

If good results aren’t achieved in one application, steps need to be repeated. Often, that means:
- Using more water and energy
- Using more product
  - Increased cost
  - More chemical released to the waste stream

Products that are not effective are not sustainable!
The Ecolab Approach To Sustainability
Total Impact

Providing sustainable solutions that go beyond green to help you create a cleaner, safer, healthier environment.

SAFETY  ENERGY  WATER  WASTE

A comprehensive approach that can help you conserve resources, improve safety and reduce waste.
The Ecolab Approach to Sustainability
Total Impact

**SAFETY**

Helping to keep people safe is our business. Ecolab is committed to the safety of your employees and your customers.
- Environmentally responsible and effective ingredients
- Controlled dispensing
- Staff training and support

**ENERGY**

Lowering your energy consumption is just one way we reduce your impact on the environment.
- Low-temperature washing
- Solid products that can be shipped using substantially less fuel

**WATER**

Our innovative solutions are designed to use less water without compromising effectiveness.
- No-rinse product formulations
- Water reconditioning technology
- Solutions that reduce required wash cycles

**WASTE**

Ecolab solutions conserve resources and help keep waste out of landfills from the beginning of the product life cycle to the end.
- Renewable materials
- Product designs that minimize packaging
- Collapsible, dissolvable, recyclable technology
Sustainable Products and Services
Total Impact: Formula 1®

Innovative technology that reduces the steps of typical wash cycle, helping our customers to conserve water, energy and labor resources.

Energy:
- Reduces energy usage by 55,000 kWh per year

Water:
- Reduces water usage by 290,000 gallons per year

Safety:
- Easy to use lightweight packaging, and a closed system that reduces the possibility of chemical contact, makes Formula 1 simpler and safer for our customer’s employees

Waste:
- Reduces plastic waste by 160 pounds per year

A single facility can save up to 290,000 gallons of water in one year.
That is enough water for 11,600 showers.

ECOLAB®
Total Impact: Apex®

Warewashing system conserves resources, improves safety and reduces waste

Energy:
- Reduces energy usage by 4,000 kWh per year

Water:
- Reduces water usage by 14,000 gallons per year

Safety:
- Easier to use color coded packaging and environmentally responsible chemistry helps to prevent mishandling of the product

Waste:
- Reduces plastic waste by 85 pounds per year

EOLAB®
Total Impact: Wash ‘n Walk®

No-rinse, enzyme-based technology, saves time and water and increases safety through increased coefficient of friction. The formulation is biodegradable and more effective than traditional floor cleaning methods.

Water:
- Reduces water usage by 10 to 20 gallons per application
- For a single property, that’s almost 5,500 gallons per year – the equivalent of 225 showers

Safety:
- Increases employee safety through closed-system dispensing
- Proven to increase friction on slippery floors, helping reduce slips and falls

Waste:
- Reduces wastewater by 10-20 gallons per application
- Controlled dispensing minimizes product usage thereby decreasing discarded packaging due to over-use of the product
Sustainable Product Innovation

Significant Plastic Reduction in Dish Detergents

- 90%
- 95%

1960

20 L container
1,250 grams

1984

Solid capsule container
125 grams

2007

Apex wrapper
7 grams

Also non-caustic, biodegradable chemistry
Oasis Pro:
Significant Reduction in Packaging Waste

Significantly reduces waste stream vs. packaging waste from commonly used Ready-To-Use solutions

70 RTU bottles generate 4,000 gm. in packaging waste for equivalent use solution

2X2 L pouches generate only 52 gm. in packaging waste

99% Reduction in Packaging Waste vs Equivalent RTU Packaging
Dry Exx Lube
Beverage Processing

Problem / Opportunity

- Lubrication of conveyors with water-based product that is 0.5 – 1.0% active – i.e. 99% water

Solution

- Non-aqueous – based lubrication system
- Intermittent Dosing

Benefits

- 2.4 MM liters/line/year water savings – Average line
- 400 million liters in NA alone in 2008
- Worker safety improvement
- Decreased wastewater burden / cost

Ecolab®
CheckPoint® Rodent Station

Patent-pending CheckPoint® Multiple Catch and Dual Snap Trap inserts stop rodents on the exterior of buildings — before they have a chance to get inside — **without the use of rodenticide.**

**Safety:**
- Reduces the risk of customer and employee exposure to rodenticide
- Lowers the risk of contamination of food and finished goods
- Non-chemical suppression reduces the impact on non-targeted animals

**Waste:**
- No rodenticide means no chemical disposal waste
- Helps minimize food waste by preventing contamination caused by rodents
Waste Treatment System
Ecovation

Problem / Opportunity

- Spray irrigation of wastewater was not a sustainable practice
- The POTW could handle high strength wastewater

Solution

- Design-build of wastewater treatment and renewable energy facility
- Designed to achieve an effluent that meets state water standards

Benefits

- Sustainable approach that supports customer’s global water recycling commitment and community conservation projects
- End land disposal practices
- Allow for future plant expansion
- Methane produced by system offsets at least 30% of current natural gas purchases
Total Impact: 360° of Protection®

- Ecolab Equipment Care (GCS) provides regular maintenance that keeps customer equipment running at peak efficiency to conserve energy.

- Pest Elimination uses integrated pest management methods, which are in compliance with the requirements for LEED certification.

- Food safety tools (Daydots) and services (EcoSure) protect the health of our customers’ staff and clients and reduce food waste.

- Water Care’s HVAC Hygiene Program improves indoor air quality and substantially reduces energy usage.
**Total Impact: Inspexx®**

Inspexx® IOBW system reconditions water to be safely reused in poultry processing

**Water:**
- Reduces water usage by **18,750,000 gallons** per year on a single line

**Waste:**
- Reduces wastewater output by **80 percent** per year

**Safety:**
- Complies with USDA water reuse regulations
Commitment to Sustainable Practices

Making the world a cleaner, safer, healthier place is our business.

- Our products are designed to provide customers with the most effective and efficient cleaning, food safety and infection control with the lowest total impact on the environment.

- Includes economic progress, environmental stewardship and social responsibility.
We’re In This Together…

- Engage all stakeholders to find solutions
- Focus on minimizing risks – chemistry is only one component
- Efficacy is essential
- Push for global sustainability standards – need comprehensive approach
CONTINUED PARTNERSHIP FOR THE FUTURE

THANK YOU