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Food Safety Products

US Industry Study with Forecasts to **2010 & 2015**

Study #2051 | May 2006 | \$4200 | 245 pages

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The dominant disinfection segment will afford the best opportunities in food safety product demand based on increasing recognition of the economic risks of a well-publicized foodborne illness incident.

US demand to grow 5.5% annually through 2010

US demand for food safety products will increase 5.5 percent per year to over \$2 billion in 2010. Strong gains will result from the development of new products, renewed federal efforts to eliminate foodborne illness outbreaks, concern over the arrival of avian flu in North America, and the development of the National Animal Identification System (NAIS).

Disinfection products to offer best opportunities

Disinfection products will afford the best opportunities and continue to dominate the food safety product market. Healthy growth in disinfectants and sanitizers will continue due to increasing recognition of the economic risks associated with a well-publicized foodborne illness incident. The primary driver of disinfectant product gains, however, will be new types of disinfection equipment as companies seek reliable, nonchemical ways of minimizing contamination risks.

Diagnostic products will also experience healthy gains as new rapid testing technologies allow companies to increase testing frequency while reducing inventory hold times for tested products. In contrast, preservatives will realize slower growth due to market maturity, new pasteurization and packaging technologies and the ongoing rise of organic food.



Smart labels and tags to advance the fastest

Smart labels and tags will experience double-digit annual growth due to the development of the NAIS, which will allow the government to trace the origin of any meat product within 48 hours. Traceability issues will also help drive software growth at an above-average pace. In the longer term, advances both in software and in smart labels and tags are expected to accelerate even further. As the technology matures, food processing and distribution companies are expected to increase deployments to achieve additional supply chain management efficiencies.

Most markets to exhibit above-average growth

The dominant food processing plant market will register strong growth, led by above-average gains in beverages, poultry and eggs, and fresh prepared foods. Farm markets will be boosted by the implementation of the NAIS and concerns over avian influenza, as well as the need to distinguish between genetically engineered and non-genetically engineered grains. The government and foodservice markets will also experience above-average gains. Demand at the wholesale/distribution/ retail level will trail the average due to shifts in consumer buying patterns and trends away from in-store food processing and preparation.

Sample Text, Table & Chart

MARKETS

Dairy Products

Demand for food safety products in the dairy industry (e.g., products sold to dairy farms) will advance at an annual pace of 3.5% through 2010. Healthy growth will be a consequence of the industry's continuing to use food safety advances to extend dairy product shelf-life. Dairy products will be a significant driver of food safety product demand. The milk is generally pasteurized with an ultra-high temperature process that can extend milk shelf-life to several months. Demand in other dairy products will output growth, in part a reflection of Americans' greater demand for yogurt at the expense of drinking milk. Dairy products represent the greatest share of product demand, while disinfectant equipment both continue to realize strong growth in other products will largely be a consequence of demand for smart labels and tags, with software also helping to spur advances.

The dairy products industry is largely composed of bottled milk, and other dairy products such as cheese and yogurt. As some farms do their own pasteurization, bottling and cheese production, not all food safety product demand in the dairy industry has been allocated here. Farm-level demand for food safety products is addressed later in this chapter.

Diagnostic products account for the largest portion of demand, though growth has not risen as rapidly as in other markets. Regular testing of milk for bacteria, as well as for drugs and antibiotics, has long been a necessity in the dairy industry. Environmental testing of surfaces has increased as additional measures have been instituted to prevent contamination from occurring at processing facilities. These steps have helped boost disinfectant and sanitizer demand, as recognition has grown

136

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TABLE IV-3

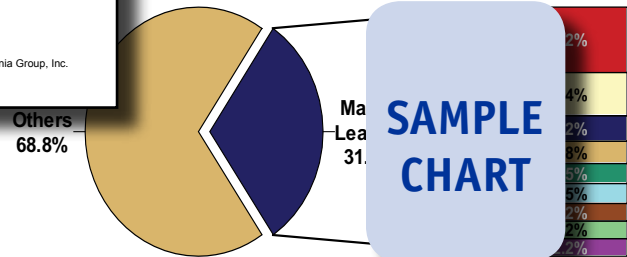
MEAT & SEAFOOD MARKET FOR FOOD SAFETY PRODUCTS (million dollars)

Item	1995	2000	2005	2010	2015
Meat & Seafood Shipments (bil \$)	8	8	8	8	8
\$ food safety/000\$ meat & seafood	2	2	2	2	2
Meat & Seafood Market					
By Application:					
Meat					
Seafood					
By Product:					
Disinfectants & Sanitizers					
Disinfection Equipment					
Diagnostics					
All Other					
% meat & seafood	2	2	2	2	2
Food Processing Market	7	7	7	7	7

SAMPLE
TABLE

CHART V-1

FOOD SAFETY PRODUCT MARKET SHARE, 2005 (\$1.6 billion)



SAMPLE
CHART

Sample Profile, Table & Forecast

COMPANY PROFILES

Strategic Diagnostics Incorporated

111 Pencader Drive
 Newark, DE 19702
 302-456-6789
<http://www.sdix.com>

Revenues: \$
 US Revenues:
 Employment:

Key Products: food, animal feed and water

Strategic Diagnostics Incorporated produces and markets biotechnology-based detection systems for food safety, pharmaceuticals, drug development, agriculture, agro-science, food and beverage, water and environmental management. The Company participates in the Food Safety, Water Quality and Antibodies.

The Company is active in the US food safety industry through the Food Safety and Water Quality markets. Products intended for food safety end uses accounted for \$9 million of Strategic Diagnostics' total sales in 2005. These products include detection systems for genetically modified organisms (GMOs), toxins and pathogens in food items. A large number of these testing products utilize immunoassay technology. Strategic Diagnostics cites Neogen Corporation as a competitor in the GMO testing market. The Company cites competitors in the food pathogen testing market as the DuPont Qualicon subsidiary of DuPont, and bioMerieux SA (France).

**SAMPLE
 PROFILE**

TABLE III-3

DISINFECTANT & SANITIZER DEMAND IN FOOD SAFETY (million dollars)

Item	1995	2000	2005	2010	2015
Consumer Food Expenditures (bil \$)	654	809	1020	1265	1560
\$ disinfectant/000\$ food	0.44	0.49	0.50	0.51	0.51
Disinfectant & Sanitizer Demand					90
By Type:					
Quat					55
Phenolic					95
Iodophor					62
Other					78
By Application:					
Food Processing Plants					83
Foodservice Establishments					70
All Other					37
% disinfectant	7	7	7	7	7
Disinfection Products Demand	36	36	36	36	240

**SAMPLE
 TABLE**

“Quat -- Demand for quaternary ammonium ion disinfectants will grow 5.1 percent annually to \$205 million in 2010, above the average pace for disinfectants in general, but a moderation from the annual gains of the previous ten year time period. Growth will be led by continued strength in the food processing market, as well as continued popularity among foodservice establishments.”

--Section III, pg. 68

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OTHER STUDIES

Implantable Medical Devices

US medical implant demand will rise 9.3% yearly through 2011. Cardiac implants will remain the top-selling group, led by stents and defibrillators. Bone cement, tissue and spinal implants will pace gains in the orthopedic segment. Other fast-growing types include neurological stimulators, cochlear devices and gastric bands. This study analyzes the \$27.9 billion US medical implant industry, with forecasts for 2011 and 2016 by material and product. It also evaluates market share and profiles major players.

#2255 10/2007..... \$4500

Biocides

US demand for biocides will grow 4.3% annually through 2010. Gains will be driven by sustained production levels in key outlets and by heightened awareness of the dangers of bacterial growth and foodborne pathogens. Higher value specialty products will continue to replace chlorine and other commodities in water treatment. This study analyzes the \$2.1 billion US biocide industry to 2010 and 2015 by product, function and market. It also evaluates company market share and profiles leading competitors.

#2082 07/2006..... \$4300

Smart Labels

US demand for smart labels will grow by 11.1% annually through 2009, driven mainly by declining costs and new industry mandates for radio frequency identification (RFID) tags. Interactive packaging labels (e.g., thermochromatic, time-temperature indicator) will also show strong gains. The dominant electronic article surveillance (EAS) sector will remain flat. This study analyzes the US smart label industry to 2009 and 2014 by product and market. It also evaluates market share and profiles major firms.

#2003 01/2006..... \$4100

Chemical Sensors

US chemical sensor demand will grow 7.4% annually through 2009. Biosensors will continue to dominate and drive gains followed by optical, ultrasound, conductometric, liquid crystal and other emerging sensor technologies. Fast growing markets include glucose tests, motor vehicles, air quality monitors and drug and alcohol detectors. This study analyzes the \$2.9 billion US chemical sensor industry to 2009 and 2014 by product, analyte and market. It also evaluates market share and profiles major producers.

#2005 12/2005..... \$4200

Disinfectant & Antimicrobial Chemicals

The US disinfectant and antimicrobial chemical market will grow 5% yearly through 2009 based on concerns about bacterial and pathogenic threats. Phenolic compounds, iodophors, nitrogen compounds and organometallics will remain the top products. The dominant disinfectant segment will outpace antimicrobials. This study analyzes the \$2 billion US disinfectant and antimicrobial chemical industry to 2009 and 2014 by product and market. It also evaluates market share and profiles major competitors.

#1975 09/2005..... \$4100

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