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US Collection

# Food Safety Products:

## United States

April 2018



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# About This Report

## Scope & Method

This report forecasts to 2022 US food safety products demand in nominal US dollars at the manufacturer level. Total demand is segmented by product in terms of:

- disinfection products
- diagnostic products
- protective apparel
- smart labels and tags
- foreign object detection equipment

Total demand is also segmented by market as follows:

- food processing plants
- foodservice establishments
- farms
- retail, wholesale, and distribution
- government

To illustrate historical trends, total demand is provided in annual series from 2007 to 2017; the various segments are reported at five-year intervals for 2007, 2012, and 2017.

Excluded from the scope of this report are:

- analytical instruments
- air and water purifiers used for general purposes
- chlorine, as it is used at such large quantities for many purposes in food processing and is incredibly low cost, limiting its importance in value terms (chlorine-containing disinfectants such as bleach-based products are included)
- color coded utensils and storage containers
- food additives and preservatives
- general purpose cleaners such as hand soap, dish detergent, and floor care products
- label printing equipment and readers
- labels that provide basic information, such as what allergens a product may contain, basic nutrition facts, product identification, and “use by” dates

- machinery used for food processing or harvesting that serves a purpose other than ensuring the safety of food (e.g., bottling and filling equipment, milking machines, conveyer systems, and industrial ovens)
- membrane filtration products used in food processing (those used in diagnostic applications are included)
- refrigeration equipment
- resold equipment
- services such as consulting, inspection, and laboratory services
- veterinary products such as animal vaccines
- water activity meters

This report quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or $r^2$. The most stable data series relative to the trend carries an $r^2$ value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the Table of Contents.

## Sources

*Food Safety Products: United States* (FF10022) is based on *Food Safety Products in the US*, a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources including:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- national, regional, and international non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

# Industry Codes

**Table 7 | Industry Codes Related to Food Safety Products**

| NAICS/SCIAN 2007 | | SIC | |
|---|---|---|---|
| **North American Industry Classification System** | | **Standard Industrial Classification** | |
| 325181 | Alkalies & Chlorine Mfg | 2812 | Alkalies & Chlorine |
| 325188 | All Other Basic Inorganic Chemical Mfg | 2819 | Industrial Inorganic Chemicals, NEC |
| 325413 | In-Vitro Diagnostic Substance Mfg | 2869 | Industrial Organic Chemicals, NEC |
| 325414 | Biological Product (except Diagnostic) Mfg | 2835 | In Vitro & In Vivo Diagnostic Substances |
| 325612 | Polish & Other Sanitation Good Mfg | 2836 | Biological Products, Except Diagnostic Substances |
| 326199 | All Other Plastics Product Mfg | 2842 | Specialty Cleaning, Polishing, & Sanitation Preparations |
| 334513 | Instruments & Related Products Mfg for Measuring, Displaying, & Controlling Industrial Process Variables | 3089 | Plastics Products, NEC |
| 334516 | Analytical Laboratory Instrument Mfg | 3823 | Industrial Instruments for Measurement, Display, & Control of Process Variables; & Related Products |
| 334519 | Other Measuring & Controlling Device Mfg | 3826 | Laboratory Analytical Instruments |
| | | 3599 | Industrial & Commercial Machinery & Equipment, NEC |
| | | 3829 | Measuring & Controlling Devices, NEC |

Source: US Census Bureau

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# Resources

## The Freedonia Group

*Food Safety Products in the US*, April 2018

**Freedonia Industry Studies**

*Labels Market in the US*, November 2017
*Food & Beverage Natural Colors Market in the US*, July 2017
*Packaging Films Market in the US*, July 2017
*Converted Flexible Packaging Market in the US*, May 2017
*Food & Beverage Hydrocolloids Market in the US*, May 2017
*Poultry Packaging Market in the US*, March 2017
*Meat Packaging Market in the US*, February 2017

**Freedonia Focus Reports**

*Analytical Instruments: United States*
*Beer: United States*
*Canned Foods: United States*
*Dairy Products: United States*
*Fertilizers: United States*
*Packaging: United States*
*Restaurants & Foodservice: United States*

**Freedonia Custom Research**

## Trade Publications

*Beverage Industry*
*Food Dive*
*Food Manufacturing*
*Food Processing*
*Food Quality*
*Food Safety News*

## Agencies & Associations

United States Census Bureau
United States Department of Agriculture
United States Department of Health & Human Services
  United States Centers for Disease Control and Prevention
  National Institutes of Health
United States Food and Drug Administration
United States International Trade Commission