Food Safety Products

US Industry Study with Forecasts for **2012 & 2017**

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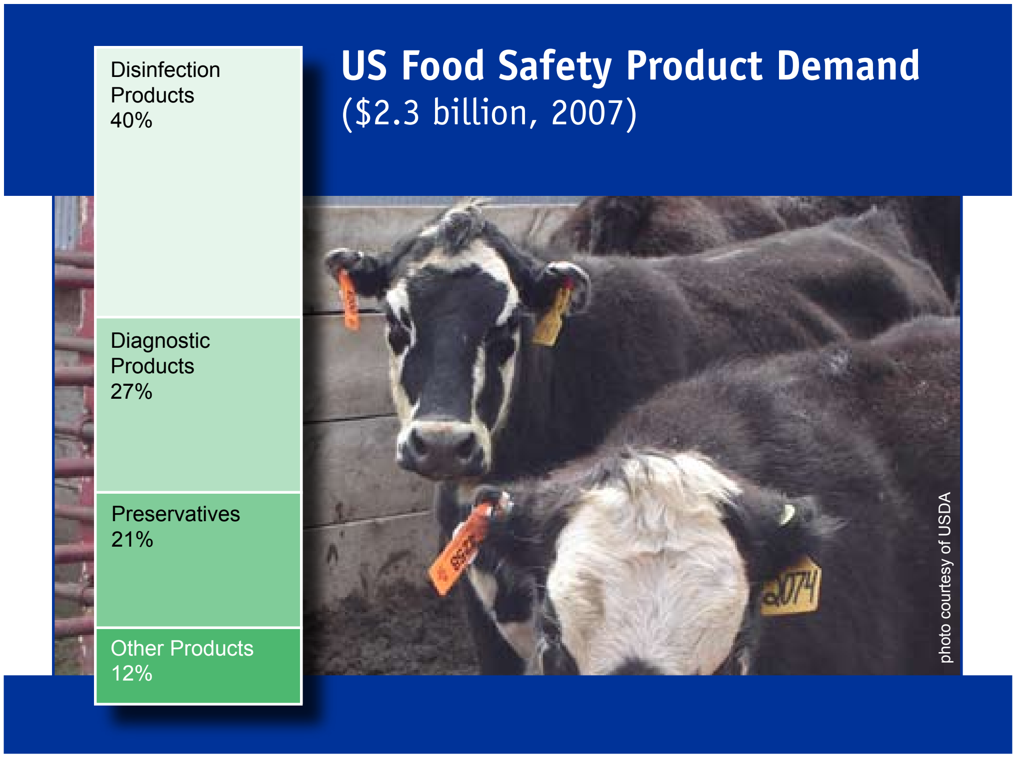
Disinfection and diagnostic products will provide the best overall opportunities, while smart labels and tags will grow the fastest based on improvements in traceability and technology.

US demand to grow 6.5% annually through 2012

US demand for food safety products will increase 6.5 percent per year to $3.2 billion in 2012. Strong gains will result from increased spending on food safety initiatives, as consumer -- and industry -- concerns rise following several well-publicized foodborne illness outbreaks, nationwide food product recalls and the discovery of contaminants in a variety of imported food products. The adoption of new rules and regulations to ensure the safety of food will also boost demand.



Disinfection products to remain dominant sector

Disinfection products will continue to account for the largest portion of demand. Disinfectants and sanitation chemicals are used at all levels of food production, processing, preparation, service and sale, reflecting their inexpensive nature, effectiveness and ease of use. Disinfection equipment will see more rapid gains, boosted by the increasing popularity of relatively new technologies such as ultraviolet and ozone disinfection. These technologies offer many advantages, including environmental friendliness, reduction of losses due to spoilage and increased shelf life. Ozone and ultraviolet disinfection preserves food properties such as texture, taste and color, which tend to be altered when using traditional pasteurization equipment to sterilize food and beverages through the use of heat.

Diagnostic products will also see strong opportunities. In particular, rapid diagnostic testing tools will continue to gain market share over conventional products as they allow companies to increase testing frequency and reduce inventory hold times. Diagnostic testing tools for pathogens will remain the most important category, especially following several foodborne outbreaks such as the Salmonella contaminated peanut butter that sickened more than 400 people across the country in 2006 and 2007. Tests for residues and allergens will also post strong growth, boosted by consumer concerns regarding the presence of pesticides and drugs (e.g., antibiotics) in food, and FDA regulations, such as new allergen labeling requirements.

Smart labels, tags to be fastest growing segment

Smart labels and tags will experience double-digit annual growth due to rising demand for the added security and efficiency they can provide. Growth in software and tracking systems will not match that of smart labels and tags, since many software programs are already capable of integrating with RFID-based systems and providing the traceability information required by companies. Demand for preservatives will advance at a below-average rate, due to market maturity, the growing popularity of organic food, and new pasteurization and packaging technologies that minimize the need for preservatives.

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Sample Text, Table & Chart

TABLE IV-3

DISINFECTANT & SANITIZER DEMAND IN FOOD SAFETY
(million dollars)

Item	1997	2002	2007	2012	2017
Consumer Food Expenditures (bil $)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]740
$ disinfectant/000$ food	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]5
Disinfectant & Sanitizer Demand	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]5
By Type:					
Quat	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]0
Phenolic	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]0
Iodophor	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]5
Chlorinated	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]0
Other	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]0
By Application:					
Food Processing Plants	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]3
Foodservice Establishments	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]4
Other	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]8
% disinfectant	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]6
Disinfection Product Demand	[illegible]	[illegible]	[illegible]	[illegible]	1785

SAMPLE TABLE

PRODUCTS

Pathogen-Specific: Demand for pathogen-specific diag
products will rise … 0 million in 201
by increased atte … afety testing pr
food processing p … create multiple
ronmental test sit … (the largest targ
and E. coli O157: … ains, as will ot
products such as … e of the most fr
diagnosed foodbor…

SAMPLE TEXT

There are a large number of specific pathogens that caus
illness in the US, including multiple strains of Salmonella an
ria. However, despite the vast number of potential pathogens
focused on the few that cause the greatest number of illnesse
reflective of the risk-based approach to food safety in the US
limited source of funds is directed at those areas with the gre
tial to see benefit. The largest source of testing demand is for Salmonella strains, due to Salmonella's pervasive presence in the environment, particularly around raw meat and egg products. Following Salmonella test demand is demand for Listeria testing products. Listeria is also fairly common in the environment and has adapted to survive under hostile conditions, including in the presence of some disinfectants. Third on the list is E. coli O157:H7. While normally associated with contaminated ground beef, E. coli O157:H7 also shows up in other meat products, as well as in fruit juices such as apple cider, and most recently on fresh produce, including lettuce in bagged salads. Other pathogen-specific tests include, for example, Campylobacter, Shigella, Hepatitis A, Norwalk Virus, Staphylococcus aureas and Cryptosporidium, though this does not represent an exhaustive list.

Many different technologies have been developed to detect specific pathogens. For instance, Strategic Diagnostics introduced RAPIDCHEK SELECT for Salmonella in August 2006. This new diagnostic testing

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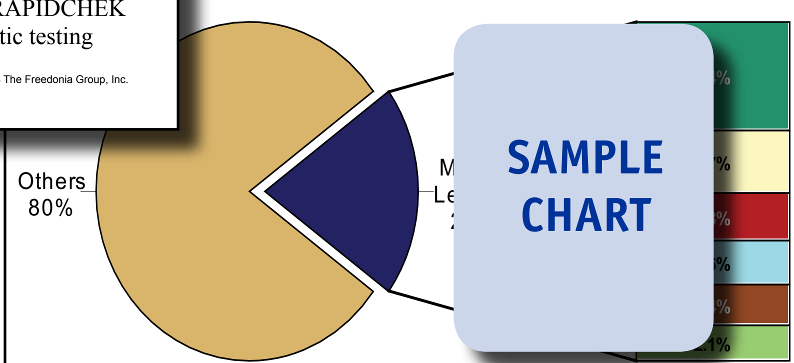
CHART VI-1

…D SAFETY PRODUCT MARKET SHARE, 2007
($2.3 billion)



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Sample Profile, Table & Forecast

TABLE V-4

PROCESSED FOOD MARKET FOR FOOD SAFETY PRODUCTS
(million dollars)

Item	1997	2002	2007	2012	2017
Processed Food Shipments (bil $)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
$ food safety/000$ processed food	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Processed Food Market	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Disinfectants & Sanitizers	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Disinfection Equipment	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Diagnostics	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Preservatives	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Other	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
% processed food	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Food Processing Market	1000	1319	1791	2451	3298

SAMPLE TABLE

COMPANY PROFILES

BioControl Systems Incorporated
12822 Southeast 32nd Street
Bellevue, WA 98005
425-603-1123
http://www.bi[illegible]

Annual Sales:
Employment:

Key Products: [illegible] monitoring test systems

SAMPLE PROFILE

BioControl Systems is a worldwide producer of industrial microbiology testing products. The privately held company primarily serves the food testing market.

The Company's food safety products include pathogen detection systems and hygiene monitoring products. BioControl Systems' rapid pathogen tests include the TRANSIA, ASSURANCE, VIP, SIMPLATE and 1-2 TEST brands. The Company's TRANSIA pathogen tests are available for Campylobacter, E. coli 0157, Staphylococcus enterotoxins, Listeria and Salmonella. BioControl Systems' TRANSIA test for Campylobacter utilizes a two-step rapid immunoassay technology method. For E. coli 0157, the Company produces TRANSIA tests in a PLATE variety, which uses enzyme linked immunosorbent assay (ELISA) technology; and in a CARD variety, which uses a one-step immunoassay reaction. In addition, BioControl Systems produces TRANSIA tests for Staphylococcus enterotoxins. These tests, which are available in PLATE, PLATE PLUS, TUBE, immunoaffinity columns (IAC) and ID varieties, offer such features as faster result times, and detection and differentiation of Staphylococcus strains. Other TRANSIA pathogen tests from the Company include Listeria tests, including

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"Demand for food safety products in processed food production will expand 5.5 percent per annum to $389 million in 2012. Preservatives account for a large part of demand, although they are a mature and slow growing product category. Stronger growth will be seen for diagnostic products, due to increased concern regarding food contamination, and other products, such as smart labels and tags, which improve operating efficiencies and facilitate traceability."
--Section V, pg. 168

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Other Studies

Infection Prevention Products & Services

US demand for infection prevention products and services will grow 4% annually through 2011, driven by efforts to combat healthcare-acquired infections. Services will outpace supplies and equipment. Among products, surgical drapes and gowns will remain dominant while waste disposal and sterilization supplies will lead gains. This study analyzes the $13.8 billion US infection prevention industry, with forecasts for 2011 and 2016 by type and market. It also evaluates market share and profiles major players.

#2234 .... 08/2007..................... $4400

Disposable Medical Supplies

US demand for disposable medical supplies will grow 4.9% annually through 2011. Best prospects include dry powder inhalers, prefilled syringes and transdermal patches for drug delivery; blood glucose test strips for diabetes monitoring; tissue sealants for wound closure; and daily contact lenses. This study analyzes the US disposable medical supply industry, with forecasts for 2011 and 2016 presented by product, market and raw material. It also evaluates company market share and profiles industry competitors.

#2196 .... 05/2007..................... $4500

In Vitro Diagnostics

US demand for *in vitro* diagnostic (IVD) products will grow 5.1% annually through 2011. Clinical chemistry and immunoassay methods will remain the top two IVD sciences, while nucleic acid testing products will continue to generate the fastest gains. Hospital labs will stay the largest market while home health care will grow the fastest. This study analyzes the $15.2 billion US IVD industry for 2011 and 2016 by product, application and market. It also evaluates company market share and profiles major players.

#2175 .... 04/2007..................... $4500

Nanotechnology in Health Care

US demand for nanotechnology medical products will grow 17.5% annually through 2011, driven by the critical need for new or improved therapies and diagnostics. The greatest short-term impact will be in cancer and central nervous system disorders, followed by orthopedic nanoimplants. This study analyzes the $23.6 billion US nanotech medical product industry for 2011, 2016 and 2021 by material, product and application. The study also reviews product development activities and profiles major players.

#2168 .... 02/2007..................... $4500

Medical Imaging (Equipment, Agents, Consumbles)

US demand for medical imaging products will grow 6% annually through 2010 based on technological advances, aging demographics and changing health care approaches. Equipment will outpace consumables, led by CT scanners and by MRI and PET machines. Radiopharmaceuticals will lead gains among consumables. This study analyzes the $16 billion US medical imaging product industry for 2010 and 2015 by type and market. It also evaluates company market share and profiles major players.

#2137 .... 12/2006..................... $4400

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