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# Food Safety Products

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US Industry Study with Forecasts for **2014 & 2019**

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*Recent high-profile foodborne illness outbreaks, in addition to large product recalls due to food safety concerns, will continue to fuel demand for food safety products in the US.*

## US demand to rise 6.7% annually through 2014

Demand for food safety products in the US is forecast to rise 6.7 percent per year to \$2.9 billion in 2014. Recent high-profile foodborne illness outbreaks, in addition to large product recalls due to food safety concerns, will continue to fuel demand, as the prevention, detection and traceability of food contaminants will remain key issues for consumers, food industry participants and legislators. Demand for food safety products will also be boosted by the adoption of more stringent food safety regulations.

## Disinfection, diagnostic products to stay dominant

Disinfection and diagnostic products will remain the largest product segments by far. These products tend to go hand-in-hand, as diagnostic products are often used to verify that disinfection products are being utilized appropriately. Demand for ozone and ultraviolet disinfection equipment is expected to see strong gains, as these systems can sanitize food and other surfaces efficiently without the use of heat or harmful chemicals. However, the high cost of such equipment will serve to limit advances somewhat. Among the smart labels and tags segment, gains in radio frequency identification (RFID) tags are expected to be strong, as their use for inventory tracking and management continues to grow. For instance, large cattle and pig farms will increasingly use



RFID tags to speed animal transfer and processing at feed lots and slaughterhouses.

## Meat industry to remain key market in large food processing segment

The food processing segment, which accounted for 70 percent of total demand for food safety products in 2009, will continue to dominate the overall market. Among the various food and beverage processing industries, the largest share of food safety product demand will stem from the meat industry, as raw meat products are easily contaminated during slaughter and subsequent processing, necessitating exten-

sive food safety measures. Advances in meat output will support demand for diagnostic testing products (such as those used to detect *Salmonella* and *E. coli*) and disinfectants and sanitizers, as well as disinfection equipment.

Demand for food safety products in foodservice establishments will be supported by growth in the foodservice industry, as consumers seek convenient, ready-to-eat offerings that provide alternatives to what is typically made at home. Food safety product demand in the foodservice sector will also be boosted by efforts on the part of restaurant operators to avoid the devastating impacts of a foodborne illness outbreak on their image.

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## Sample Text, Table & Chart

### PRODUCTS

#### Disinfectants & Sanitizers

Demand for disinfectants and sanitizers is forecast to grow at a steady pace through 2014. This projection covers the ready-to-use (or dilute) products, which are the highest demand, due to their ease of use and effectiveness. Chlorinated products will continue to lose market share to quaternary ammonium disinfectants and sanitizers. A continuing increase in awareness of the importance of disinfection activities, as well as government efforts to eliminate contamination at the food production level, will help drive gains going forward.

Sales of disinfectants and sanitizers will experience headwinds as food industry participants seek to satisfy the stringent requirements of consumers, regulators, and national and global retailers and foodservice companies, especially following several foodborne illness outbreaks (e.g., the 2008-2009 case of Salmonella contaminated peanut butter, which caused nine deaths and sickened more than 700 Americans) and nationwide food product recalls (e.g., contaminated hydrolyzed vegetable protein in 2010). In addition, trends toward the use of more expensive and user-friendly disinfectants and sanitizers in foodservice establishments will boost value gains in that segment.

Disinfectants and sanitizers are the primary means by which food companies prevent microbial contamination of food. They are used throughout food production, processing, delivery and preparation, reflecting their inexpensive nature, effectiveness and ease of use. At the farm level, disinfectants and sanitizers are used in livestock operations to disinfect pens and stalls, thereby helping to minimize pathogens on the animals themselves. This also helps improve overall animal health.

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**SAMPLE TEXT**

TABLE IV-9

### DISINFECTION EQUIPMENT DEMAND IN FOOD SAFETY (million dollars)

Item	1999	2004	2009	2014	2019
Food & Beverage Shipments (bil \$)	400	450	500	550	600
\$ equipment/000\$ food	1.0	1.1	1.2	1.3	1.4
Disinfection Equipment Demand	400	450	500	550	600
By Type:					
Pasteurization	0	0	0	0	0
Ultraviolet	5	5	5	5	5
Ozone	0	0	0	0	0
Other	5	5	5	5	5
By Market:					
Food Processing Plants	0	0	0	0	0
Beverages	0	0	0	0	0
Dairy Products	1	1	1	1	1
Meat	9	9	9	9	9
Processed Food	3	3	3	3	3
Poultry & Eggs	1	1	1	1	1
Seafood	0	0	0	0	0
Other	6	6	6	6	6
Other	0	0	0	0	0
% equipment	0	0	0	0	0
Disinfection Product Demand	70	70	70	70	70

**SAMPLE TABLE**

CHART VI-2

### FOOD SAFETY DIAGNOSTIC PRODUCT MARKET SHARE, 2009 (\$730 million)

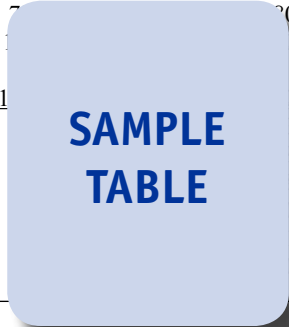


**SAMPLE CHART**

## Sample Profile, Table & Forecast

**TABLE V-1**  
**FOOD SAFETY PRODUCT DEMAND BY MARKET**  
 (million dollars)

Item	1999	2004	2009	2014	2019
Consumer Food Expenditures (bil \$)	700	700	700	700	700
\$ food safety/000\$ food	23	23	23	23	23
Food Safety Products Demand	1	1	1	1	1
Food Processing Plants					
Other Markets:					
Foodservice Establishments					
Farms					
Retail, Wholesale & Distribution					
Government					



**COMPANY PROFILES**

**Neogen Corporation**  
 620 Leshar Place  
 Lansing, MI 48912  
 517-372-6000  
 http://www.neogen.com

Sales: \$  
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Key Pro... ure media and  
 related s

**SAMPLE PROFILE**

Neogen develops, manufactures and markets a range of products for the food processing and agricultural markets. The Company operates through two segments: Food Safety and Animal Safety.

The Company is active in the US food safety industry through the Food Safety segment, which had FY 2009 sales of \$61 million. The segment produces diagnostic test kits and associated products for food and animal feed producers and processors. These tests primarily utilize immunoassay technology, which is designed for rapid detection of the target substance. Neogen maintains two manufacturing and warehousing sites in Lansing, Michigan that occupy a total of 25,000 square feet of space.

Among the immunoassay tests from Neogen are REVEAL for detecting pathogens such as E. coli, Salmonella and Listeria; food allergens; and mycotoxins. Another immunoassay test, ALERT, detects pathogens and food allergens. Neogen's VERATOX test is designed to identify mycotoxins and food allergens. Other immunoassay tests from

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“Demand for food safety products in food processing plants will increase 6.6 percent per year to more than \$2 billion in 2014. This will reflect continued industry focus on food safety as a primary concern. Growth will be relatively broad-based, with the fastest gains in the beverage, seafood and fresh prepared food segments. From a product perspective, advances in ...”

--Section V, pg. 156

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**OTHER STUDIES**

**World Aquaculture: Feed, Equipment & Chemicals**

Global demand for aquaculture supplies and equipment will grow 11.6% annually through 2014. The Asia/Pacific region will continue to dominate both production and consumption. Aquafeed will remain the largest product segment and be the fastest growing. This study analyzes the world aquaculture supplies and equipment industry, with forecasts for 2014 and 2019 by product, species, world region and for 15 countries. It also evaluates company market share and profiles industry participants.

#2680 ..... October 2010 ..... \$5800

**Industrial & Institutional (I&I) Cleaning Chemicals**

US demand for industrial and institutional (I&I) cleaning chemicals will increase 4% annually through 2014. Disinfectants and sanitizers will be the fastest growing type as the food industry faces tighter safety requirements. General purpose cleaners and floor care cleaners will remain the largest segments. This study analyzes the \$8.8 billion US I&I cleaning chemical industry, with forecasts for 2014 and 2019 by market, product and raw material. It also evaluates company market share and profiles industry players.

#2683 ..... September 2010 ..... \$4900

**World Industrial & Institutional Cleaning Chemicals**

Global demand for industrial and institutional (I&I) cleaning chemicals will rise 4.4% yearly through 2013. Gains will be fastest in developing countries. The shift toward higher-end formulations with reduced environmental impact will continue, although commodity cleaners will retain their presence. This study analyzes the \$30 billion world I&I cleaning chemical industry, with forecasts for 2013 and 2018 by product, market, world region and for 18 countries. It also evaluates company market share and profiles industry participants.

#2608 ..... April 2010 ..... \$5800

**Infection Prevention Products & Services**

US demand for infection prevention products and services will increase 4.8% annually through 2013. The best growth opportunities are anticipated in safety-enhanced devices that reduce the risk of health care acquired infections. Medical waste disposal and sterilization supplies, as well as high level disinfectants, will also do well. This study analyzes the \$18.6 billion US infection prevention industry, with forecasts for 2013 and 2018 by product, service and market. It also evaluates market share and profiles industry players.

#2526 ..... August 2009 ..... \$4700

**Food Safety Products in China**

Food safety product demand in China will grow 15% yearly through 2013. Growth will be driven by ongoing food and beverage output gains, especially processed items, and more focus on food safety and supply chain security. Disinfection products will remain the largest segment while tracking products grow the fastest. This study analyzes the 6.5 billion yuan food safety product industry in China, with forecasts for 2013 and 2018 by product and market. It also evaluates market share and profiles industry participants.

#2525 ..... July 2009 ..... \$5200

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