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# World Food Safety Products

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

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Study #2693 | November 2010 | \$5800 | 315 pages

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*Growth in food and beverage processing activity, as well as increasingly strict food safety regulations worldwide, will fortify global demand for food safety products through 2014.*

## Global demand to grow 8.1% yearly through 2014

World demand for food safety products -- including disinfection and diagnostic products, smart labels and tags, and software and tracking systems -- is projected to rise 8.1 percent per year to \$13.6 billion in 2014. Advances will be fortified by gains in food and beverage processing activity and increasingly strict food safety regulations worldwide, especially following several recent high-profile cases of food contamination (e.g., melamine-contaminated milk in China in 2008 and the massive egg recall in the US in 2010). Some of the best opportunities for food safety products will be found in the Asia/Pacific region, which will account for 40% of aggregate market value gains between 2009 and 2014.

## Developing regions to exhibit fastest advances

While the US is by far the world's biggest national user of food safety products (accounting for 23 percent of demand in 2009), the most rapid advances will occur in developing regions. Gains in Asia, the Africa/Mideast region, Eastern Europe, and Central and South America will all outpace the global average. Industrialization trends and increases in living standards will fuel demand for food safety products in these regions' generally underdeveloped food and beverage processing and foodservice industries. Also, as food trade becomes increasingly important, developing nations need



to meet developed country standards or risk losing export demand. China will continue to post some of the fastest demand growth, due to mounting pressure on the part of consumers, producers and regulators to ensure the safety of the food supply. India will also exhibit rapid increases in food safety product demand through 2014, but gains will stem from a much smaller base.

## Disinfection products to remain dominant

Disinfection products will continue to account for the bulk of food safety product demand worldwide. While demand for disinfectants is relatively mature, the rising number of reported foodborne

outbreaks and food product recalls will support sales going forward. Food safety diagnostic product demand will be fueled by trends toward the use of rapid diagnostic tests, which are more expensive than their conventional counterparts.

Demand for smart labels and tags, software and tracking systems in food safety applications will post rapid gains, albeit from small bases. These products are important in ensuring food product traceability. As food safety awareness continues to rise globally, traceability programs will be increasingly adopted in food-exporting countries (industrialized and developing) as a means to meet or exceed international standards and improve their competitiveness.

## Sample Text, Table & Chart

### ASIA/PACIFIC

#### Japan: Food Safety Product Demand

Demand for food safety products in Japan totaled \$1.4 billion in 2009, accounting for close to two-fifths of the market in the region. Japan's market for food safety products is relatively small, but much faster growth will be seen in the region's developing countries (China and India in particular). Although Japan was the largest market in the region in 2009, China's market size will surpass Japan by 2014.

Through 2014, demand for food safety products in Japan is expected to increase to \$1.8 billion, below the regional and global market. The country's strict food safety regulations will limit sales of all major types of products. More investment in high-technology industries, such as food safety FIDs, software and tracking systems in traceability, will be seen throughout the food supply chain.

However, growth will be somewhat limited by a decrease in the country's population and weakness in key end-user industries. In particular, projected declines in Japan's food and beverage processing industry will prevent faster growth in food safety products such as disinfectants and sanitizers, and disinfection equipment.

Japan's Department of Food Safety is responsible for overseeing the country's food safety efforts and enforcing related laws, such as the Food Safety Basic Law, the Food Sanitation Law, the Abattoir Law, and the Poultry Slaughtering Business Control and Poultry Inspection Law. Local governments conduct inspection and food safety testing of related businesses (their business license is suspended and/or revoked if they violate any food safety law). Such strict food safety regulations, which are among the most stringent in the world, will continue to drive demand for all major types of food safety products in Japan.

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TABLE VI-9

JAPAN -- FOOD SAFETY PRODUCT MARKET ENVIRONMENT  
(billion 2008 dollars)

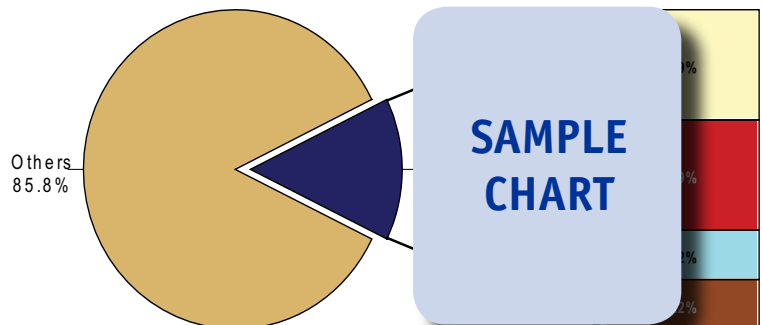
| Item                                       | 1999   | 2004   | 2009   | 2014   | 2019   |
|--|--------|--------|--------|--------|--------|
| Population (million persons)               | 125.6  | 126.0  | 126.5  | 127.0  | 127.5  |
| \$ GDP/capita                              | 20,000 | 21,000 | 22,000 | 23,000 | 24,000 |
| Gross Domestic Product                     | 2,500  | 2,650  | 2,800  | 2,950  | 3,100  |
| Personal Consumption Expenditures          | 1,800  | 1,900  | 2,000  | 2,100  | 2,200  |
| Agricultural Value Added                   | 150    | 145    | 140    | 135    | 130    |
| Food & Bev Manufacturing Value Added       | 1,500  | 1,550  | 1,600  | 1,650  | 1,700  |
| Foodservice Revenues (bil \$)              | 1,200  | 1,250  | 1,300  | 1,350  | 1,400  |
| Food Safety Product Demand (mil \$)        | 1,400  | 1,450  | 1,500  | 1,550  | 1,600  |
| % Japan                                    | 8.8    | 9.0    | 9.2    | 9.4    | 9.6    |
| Asia/Pacific Food Safety Products (mil \$) | 16,000 | 16,500 | 17,000 | 17,500 | 18,000 |

SAMPLE  
TABLE

SAMPLE  
TEXT

CHART VIII-1

WORLD FOOD SAFETY PRODUCT MARKET SHARE  
(\$9.2 billion, 2009)

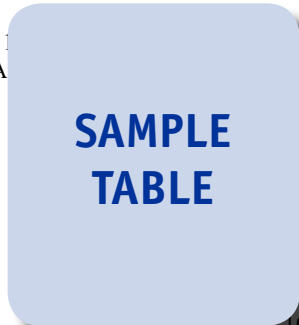


SAMPLE  
CHART

## Sample Profile, Table & Forecast

**TABLE VI-10**  
**JAPAN -- FOOD SAFETY PRODUCT DEMAND BY TYPE & MARKET**  
 (million dollars)

| Item                                | 1999 | 2004 | 2009 | 2014 | 2019 |
|-------------------------------------|------|------|------|------|------|
| Food & Beverage MVA (bil 2008\$)    |      |      |      |      | 1.5  |
| \$ food safety/000\$ food & bev MVA |      |      |      |      | 0.1  |
| Food Safety Product Demand          |      |      |      |      | 1.0  |
| By Type:                            |      |      |      |      |      |
| Disinfection Products               |      |      |      |      | 1.0  |
| Diagnostic Products                 |      |      |      |      | 2.0  |
| Other Products                      |      |      |      |      | 1.0  |
| By Market:                          |      |      |      |      |      |
| Food Processing Plants              |      |      |      |      | 0.25 |
| Foodservice Establishments          |      |      |      |      | 1.65 |
| Other Markets                       | 75   | 90   | 105  | 125  | 150  |



**COMPANY PROFILES**

**BioControl Systems Incorporated**  
 12822 Southeast 32nd Street, Suite 100  
 Bellevue, WA 98005  
 425-603-1123  
 http://www.biocontrol.com

Annual Sales:  
 Employment:

Key Products: monitoring products

**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. Among BioControl Systems' rapid pathogen tests are the TRANSIA, ASSURANCE, SIMPLATE, VIP and 1-2 TEST brands. TRANSIA pathogen tests from the Company are available for *Staphylococcus enterotoxins*, *E. coli* O157H7, *Campylobacter*, *Listeria* and *Salmonella*. These tests include the PLATE, PLATE PLUS, PLATE GOLD, CARD and LFD Strip varieties. The Company's ASSURANCE pathogen tests are available in enzyme immunoassay (EIA), GOLD EIA and GDS types. Among these products, ASSURANCE EIA tests for *Campylobacter*, *Listeria*, *Salmonella* and *E. coli* O157:H7 have EIA technology. ASSURANCE GOLD EIA and ASSURANCE GDS tests are used to detect *Campylobacter*, *E. coli*, *Listeria*, *Shiga toxins* and *Salmonella*. The Company also produces SIMPLATE tests, which use a nutritionally defined formulation to detect the presence of *Campylobacter*, *E. coli*, coliforms, yeast and mold. Other pathogen tests from BioControl Systems include

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"Through 2014, demand for food safety products in Japan is expected to increase 5.4 percent annually to \$1.4 billion, below both the regional and global averages, but still considerable. The country's strict food safety regulatory environment will support sales of all major types of products. Moreover, due to its strength in high-technology industries, Japan will remain one of the largest users of RFIDs, software and tracking systems in traceability applications throughout the food supply chain."  
 --Section VI, pg. 164





**OTHER STUDIES**

**World Protective Packaging**

World demand for protective packaging will rise 7.8% per year through 2014. Advances will be stimulated by an upswing in manufacturing activity and the continued proliferation of Internet shopping. The US will remain the largest national market while China grows the fastest. This study analyzes the \$15.3 billion world protective packaging industry, with forecasts for 2014 and 2019 by product, material, function, market, world region and for 24 countries. It also evaluates company market share and profiles industry participants.

#2651 ..... June 2010 ..... \$5800

**Food Safety Products**

US food safety product demand will rise 6.7% yearly through 2014, driven by food safety concerns and regulations. The food and beverage processing market will remain dominant, led by the beverage segment. Disinfection and diagnostic products will continue as the most common types, while smart labels and tags will see the fastest growth. This study analyzes the \$2.1 billion US food safety product industry, with forecasts for 2014 and 2019 by product and market. It also evaluates company market share and profiles industry players.

#2618 ..... April 2010 ..... \$4800

**Foodservice Disposables**

US foodservice disposables demand will rise 3.5% yearly through 2013, based on the ongoing popularity of away-from-home eating and ready prepared foods. Packaging products will grow the fastest and overtake serviceware as the largest segment. Eating and drinking places will remain the top market while retail and vending lead gains. This study analyzes the \$14.8 billion US foodservice disposables industry, with forecasts for 2013 and 2018 by product and market. It also evaluates market share and profiles industry players.

#2545 ..... 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

**Active & Intelligent Packaging**

US demand for active and intelligent packaging will climb 8.3% yearly through 2013, driven in part by food safety concerns and losses in perishables. Intelligent packaging will grow the fastest, propelled by time-temperature indicators and other products that offer product differentiation, traceability and interactive features. This study analyzes the \$1.3 billion US active and intelligent packaging industry, with forecasts for 2013 and 2018 by product and market. It also evaluates market share and profiles industry players.

#2515 ..... July 2009 ..... \$4700

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