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# World Food Safety Products

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Industry Study with Forecasts for **2016 & 2021**

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Study #2969 | November 2012 | \$6100 | 363 pages

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*Foodborne illness outbreaks and food safety product recalls will continue to fuel demand for products used in the prevention, identification, and traceability of food contaminants.*

## World demand to rise 8.4% annually through 2016

World demand for food safety products is forecast to rise 8.4 percent per year to \$18 billion in 2016. High profile international foodborne illness outbreaks, in addition to large product recalls due to food safety concerns, will continue to fuel demand as the prevention, identification, 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 in both developed and developing countries. Advances will further be supported by growth in food and beverage production, and expansion in the foodservice industry, as food processing plants and foodservice establishments constitute the largest markets for food safety products.

## Food processing plants to remain largest market

The food processing plants segment will continue to account for the majority of the overall market for food safety products. The largest share of demand will stem from the meat, dairy, and beverage industries. Raw meat is easily contaminated during slaughter and subsequent processing, necessitating extensive food safety measures. Dairy product manufacturers will use food safety product improvements to extend dairy product shelf life, with above

## World Food Safety Product Demand (\$18 billion, 2016)



Photo: Zadro

Asia/Pacific	32%
North America	31%
Western Europe	22%
Other Regions	15%

average growth expected for organic dairy products. Gains in beverage applications will be fueled by investment in disinfection equipment, particularly filtration, ultraviolet, and ozone equipment, to purify water supplies.

## Disinfection products to remain largest segment

Disinfection products will continue to account for the largest share of the global market for food safety products, representing over one-half of total demand through the forecast period. Disinfectants and sanitizers are used at every level of food production, delivery, and preparation, reflecting the variety of potential food contamination points. Use

of disinfection equipment, on the other hand, is concentrated at the food processing level. Demand for diagnostic testing products will benefit from an upsurge in the frequency of food plant inspections, in no small part due to increasingly strict food safety regulations worldwide. Demand for disposable gloves is also expected to advance rapidly, boosted by gains in foodservice applications, especially in the fast growing quick service restaurant segment. Good opportunities will exist for smart labels and tags, driven by the rapid adoption of new smart label technology in food packaging and heightened emphasis on traceability in the food supply chain.

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## Sample Text, Table & Chart

### ASIA/PACIFIC

#### Australia: Food Safety Product Demand

In 2011, demand for food safety products in Australia totalled US\$192 million, representing five percent of the market for the Asia Pacific region. Disinfection products will continue to account for the bulk of total demand, due to widespread usage in the country's food and beverage processing sector. Food and beverage processing plants remain the largest market for food safety products, with food and farm applications also accounting for significant shares of the total demand.

Demand for food safety products in Australia is forecast to reach \$200 million in 2016. Improved regulatory requirements will increase demand, as will increasing regulatory requirements. Australia is expected to continue to be a leader in food safety products in the world, due to rigorous quality standards and verified by inspection participants and verified by inspection participants. The Food Safety Code is continually updated to include the latest food safety standards. For instance, in May 2012 the code was amended to approve the use of 1,3-dibromo-5,5-dimethylhydantoin (DBDMH) as an antimicrobial processing aid for treating poultry, meat carcasses, and other animal parts. Trade is also a factor in certain applications. For example, Australia is one of the world's largest beef producers, with significant exports to countries like Japan, which has high food safety standards.

The Food Safety Standards for Australia will continue to require food-related businesses to follow strict food safety practices, including facilities and transport vehicles that meet specific standards. Other organizations such as the Food Safety Centre (FSC) and the Food Safety Information Council (FSIC) are actively promoting food safety through various initiatives, including research and public education.

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**TABLE VI-4**  
**AUSTRALIA:**  
**FOOD SAFETY PRODUCT DEMAND BY TYPE & MARKET**  
 (million US dollars)

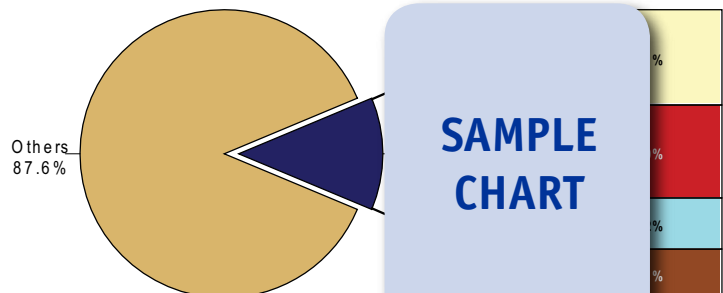
Item	2001	2006	2011	2016	2021
Food & Beverage MVA (bil 2010 US\$)					
\$ food safety/000\$ food & bev MVA					
Food Safety Product Demand					
By Type:					
Disinfection Products					
Diagnostic Products					
Other Products					
By Market:					
Food Processing Plants					
Foodservice Establishments					
Other Markets	24	31	45	62	85

**SAMPLE  
TABLE**

**SAMPLE  
TEXT**

**CHART VIII-1**

**WORLD FOOD SAFETY PRODUCT MARKET SHARE**  
 (\$12.1 billion, 2011)

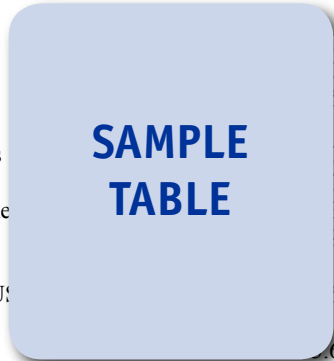


**SAMPLE  
CHART**

## Sample Profile, Table & Forecast

**TABLE VI-3**  
**AUSTRALIA:**  
**FOOD SAFETY PRODUCT MARKET ENVIRONMENT**  
 (billion 2010 US dollars)

Item	2001	2006	2011	2016	2021
Population (million persons)					
\$ GDP/capita					
Gross Domestic Product					
Personal Consumption Expenditures					
Agricultural Value Added					
Food/Bev Manufacturing Value Added					
Foodservice Revenues (bil US\$)					
Food Safety Product Demand (mil US\$)					
% Australia					
A/P Food Safety Products (mil US\$)	1540	2265	3530	5800	9500



**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 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. 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 *Staphylococcal enterotoxins*, *E. coli O157:H7*, *Campylobacter*, *Listeria*, and *Salmonella*. It's ASSURANCE pathogen tests are available in enzyme immunoassay (EIA) and Genetic Detection System (GDS) types. Among these products, ASSURANCE EIA tests for *Campylobacter*, *Listeria*, *Salmonella*, and *E. coli O157:H7* feature EIA technology. ASSURANCE GDS tests are used to detect *Campylobacter*, *E. coli*, *Listeria*, *Shiga toxins*, and *Salmonella*. The Company also creates 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 VIP GOLD rapid visual immunoprecipitate assays for *Salmonella*, *Listeria*, and *E. coli O157:H7* that are self-contained and

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"Foodservice revenues in Australia are projected to increase 3.3 percent annually to US\$33 billion in 2016. Overall economic expansion and increases in consumer spending will support advances in away-from-home food expenditures. The fastest growth will be seen in quick service restaurants, based on the convenience and value emphasis of these establishments. However, factors that will moderate gains in that segment include ..."  
 --Section VI, pg. 160

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**OTHER STUDIES**

**World Industrial & Institutional Cleaning Chemicals**

World demand for industrial and institutional (I&I) cleaning chemicals will rise 4.7 percent yearly to \$44.4 billion in 2016. North America and Western Europe will remain dominant but developing regions will grow faster. Disinfectants and sanitizers will benefit from use in fast growing health care and food processing markets. This study analyzes the \$35.3 billion world I&I cleaning chemical industry, with forecasts for 2016 and 2021 by product, market, world region and for 18 countries. The study also evaluates company market share and profiles industry participants.

#2945 ..... October 2012 ..... \$6100

**In Vitro Diagnostics**

US demand for *in vitro* diagnostic (IVD) products will rise 6.1 percent annually to \$24.7 billion in 2016. Molecular diagnostic products will grow the fastest due to their advantages in the detection of infectious diseases, tumors and genetic disorders. Hospital labs will continue to comprise the largest and most diverse market. This study analyzes the \$18.4 billion US IVD products industry, with forecasts for 2016 and 2021 by type, application and market. The study also considers market environment factors, evaluates company market share and profiles industry players.

#2923 ..... July 2012 ..... \$5100

**Industrial & Institutional Cleaning Chemicals**

Demand in the US for industrial and institutional (I&I) cleaning chemicals will increase 3.7 percent per year to \$11 billion in 2016. Disinfectants and sanitizers and hand cleansers will be the fastest growing products. The manufacturing market will lead gains, driven by the food and beverage processing and fabricated metals processing segments. This study analyzes the \$9.3 billion US I&I cleaning chemical industry, with forecasts for 2016 and 2021 by market, product and raw material. The study also evaluates company market share and profiles industry players.

#2916 ..... July 2012 ..... \$5100

**Food Safety Products**

Demand for food safety products in the US is forecast to increase 7.3 percent annually to \$4.5 billion in 2016. Smart labels and tags, and software and tracking systems will see the fastest gains by product, followed by diagnostic products. Food processing plants will remain the largest market, but will be slightly outpaced by other, smaller markets. This study analyzes the \$3.2 billion US food safety product industry, with forecasts for 2016 and 2021 by product and market. The study also evaluates company market share and profiles industry players.

#2887 ..... May 2012 ..... \$4900

**Disposable Medical Supplies**

US disposable medical supplies demand will rise 4.3 percent yearly to \$46.7 billion in 2016. Syringes and inhalers, IV and urinary catheters, hemodialysis bloodlines, peritoneal dialysis kits, tissue sealants, biological wound dressings, Class IV garments and textiles, and blood glucose test strips will be among the fastest growing products. This study analyzes the \$37.8 billion US disposable medical supplies industry, with forecasts for 2016 and 2021 by product, market and material. The study also evaluates company market shares and profiles industry players.

#2853 ..... March 2012 ..... \$5100

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