

NEW

Industry forecasts for 2014 & 2019

World Food Safety Products

Study # 2693

November 2010

\$5800

Global demand to rise 8.1% annually through 2014

World demand for food safety products -- including disinfection and diagnostic products, as well as 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 stimulated 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 remain the largest regional market globally. The region will also see the fastest growth through the forecast period and will account for two-fifths of aggregate market value gains between 2009 and 2014.

China, developing regions to see fastest advances

While the US is by far the world's biggest user of food safety products (accounting for 23 percent of total demand in 2009), the most rapid advances will occur in developing regions. Growth 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 see 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 (following a string of food safety incidents involving contaminated Chinese food products). India will also see rapid increases in food safety product demand through 2014, but gains will stem from a much smaller base.

Disinfection products to remain largest segment

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 boosted by trends toward the use of rapid diagnostic tests, which are more expensive than their conventional counterparts. Increases in food safety inspections by government agencies -- especially in developed countries and in countries with large, export-oriented food industries, such as China -- will also boost demand for diagnostic products as a matter of course.

Smart labels and tags, software and tracking systems to be fastest growing types

Demand for smart labels and tags, and software and tracking systems in food safety applications will see fast advances, albeit from a low base. 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.

Study coverage

This new Freedonia industry study, *World Food Safety Products*, is priced at \$5800. It presents historical demand data (1999, 2004 and 2009) plus forecasts for 2014 and 2019 by market, product, world region and for 17 countries. The study also considers key market environment factors, evaluates company market share and profiles 33 global industry players, including bioMerieux, Diversey, Ecolab, IDEXX Laboratories and Tetra Pak.

Copyright 2010 The Freedonia Group, Inc.

For complete details on any study visit www.freedoniagroup.com

Introduction
EXECUTIVE SUMMARY

- 1 Summary Table

MARKET ENVIRONMENT
General
World Economic Overview

Recent Historical Trends

Macroeconomic Outlook

World Demographic Outlook

World per Capita Gross Domestic Product

World Personal Consumption & Expenditure Trends

World Agricultural Outlook

World Food & Beverage Manufacturing Outlook

World Food Distribution Trends

World Food Trade

World Foodservice Industry Outlook

World Food-Related Illness Trends

Regulatory Issues

LIST OF TABLES & CHARTS:

- 1 World Gross Domestic Product by Region

- 2 World Population by Region

- 3 World per Capita Gross Domestic Product by Region

- 4 World Personal Consumption Expenditures by Region

- Cht Food Safety Product Demand/Food & Beverage MVA Relationship, 2009

- Cht Food Distribution Industry Flowchart

- 5 World Agricultural Value Added by Region

- 6 World Food & Beverage Manufacturing Value Added by Region

- 7 World Foodservice Revenues by Region

OVERVIEW
General
Regional Overview
Product Overview

Disinfection Products

Diagnostic Products

Other Products

Market Overview

Food Processing Plants

Foodservice Establishments

Other Markets

Technology Overview

Disinfection Products

Diagnostic Products

Smart Labels & Tags

Other Products

LIST OF TABLES & CHARTS:

- 1 World Food Safety Product Demand by Region

- Cht World Food Safety Product

- Demand by Region, 2009

- 2 World Food Safety Product Demand by Type

- Cht World Food Safety Product

- Demand by Type, 2009

- 3 World Disinfection Product Demand in

- Food Safety by Region & Type

- Cht World Disinfection Product Demand in

- Food Safety by Region, 2009

- 4 World Diagnostic Product Demand in

- Food Safety by Region & Type

- Cht World Diagnostic Product Demand in

- Food Safety by Region, 2009

- 5 World Other Food Safety Product

- Demand by Region & Type

- Cht World Other Food Safety Product

- Demand by Region, 2009

- 6 World Food Safety Product Demand by Market

- Cht World Food Safety Product

- Demand by Market, 2009

- 7 World Food Processing Plant Market for

- Food Safety Products by Region

- Cht World Food Processing Plant Market for

- Food Safety Products by Region, 2009

- 8 World Foodservice Market for Food

- Safety Products by Region

- Cht World Foodservice Market for Food Safety

- Products by Region, 2009

- 9 World Other Markets for Food Safety

- Products by Region & Application

- Cht World Other Markets for Food Safety

- Products by Region, 2009

NORTH AMERICA
General
Food Safety Product Demand
United States
Canada
Mexico
LIST OF TABLES & CHARTS:

- 1 North America -- Food Safety Product

- Market Environment

- 2 North America -- Food Safety Product

- Demand by Type & Market

- Cht North America -- Food Safety Product

- Demand by Country, 2009

- 3 United States -- Food Safety Product

- Market Environment

- 4 United States -- Food Safety Product

- Demand by Type & Market

- 5 Canada -- Food Safety Product

- Market Environment

- 6 Canada -- Food Safety Product

- Demand by Type & Market

- 7 Mexico -- Food Safety Product

- Market Environment

- 8 Mexico -- Food Safety Product

- Demand by Type & Market

WESTERN EUROPE
General
Food Safety Product Demand
France
Germany
Italy
Netherlands
Spain
United Kingdom
Other Western Europe
LIST OF TABLES & CHARTS:

- 1 Western Europe -- Food Safety Product

- Market Environment

- 2 Western Europe -- Food Safety Product

- Demand by Type & Market

- Cht Western Europe -- Food Safety Product

- Demand by Country, 2009

- 3 France -- Food Safety Product

- Market Environment

- 4 France -- Food Safety Product

- Demand by Type & Market

- 5 Germany -- Food Safety Product

- Market Environment

- 6 Germany -- Food Safety Product

- Demand by Type & Market

- 7 Italy -- Food Safety Product Market Environment

- 8 Italy -- Food Safety Product

- Demand by Type & Market

- 9 Netherlands -- Food Safety Product

- Market Environment

- 10 Netherlands -- Food Safety Product

- Demand by Type & Market

- 11 Spain -- Food Safety Product

- Market Environment

- 12 Spain -- Food Safety Product

- Demand by Type & Market

- 13 United Kingdom -- Food Safety Product

- Market Environment

- 14 United Kingdom -- Food Safety Product

- Demand by Type & Market

- 15 Other Western Europe -- Food Safety Product

- Market Environment

- 16 Other Western Europe -- Food Safety Product

- Demand by Type & Market

ASIA/PACIFIC
General
Food Safety Product Demand
Australia
China
India
Japan
South Korea
Taiwan
Other Asia/Pacific
LIST OF TABLES & CHARTS:

- 1 Asia/Pacific -- Food Safety Product

- Market Environment

- 2 Asia/Pacific -- Food Safety Product

- Demand by Type & Market

- Cht Asia/Pacific -- Food Safety Product

- Demand by Country, 2009

- 3 Australia -- Food Safety Product

- Market Environment

- 4 Australia -- Food Safety Product

- Demand by Type & Market

- 5 China -- Food Safety Product

- Market Environment

- 6 China -- Food Safety Product

- Demand by Type & Market

- 7 India -- Food Safety Product

- Market Environment

- 8 India -- Food Safety Product

- Demand by Type & Market

- 9 Japan -- Food Safety Product

- Market Environment

- 10 Japan -- Food Safety Product

- Demand by Type & Market

- 11 South Korea -- Food Safety Product

- Market Environment

- 12 South Korea -- Food Safety Product

- Demand by Type & Market

- 13 Taiwan -- Food Safety Product

- Market Environment

- 14 Taiwan -- Food Safety Product

- Demand by Type & Market

- 15 Other Asia/Pacific -- Food Safety Product

- Market Environment

- 16 Other Asia/Pacific -- Food Safety Product

- Demand by Type & Market

OTHER REGIONS
Central & South America
Brazil
Other Central & South America
Eastern Europe
Russia
Other Eastern Europe
Africa/Mideast
LIST OF TABLES & CHARTS:

- 1 Central & South America -- Food Safety

- Product Market Environment

- 2 Central & South America -- Food Safety

- Product Demand by Type & Market

- 3 Brazil -- Food Safety Product

- Market Environment

- 4 Brazil -- Food Safety Product

- Demand by Type & Market

- 5 Other Central & South America -- Food Safety

- Product Market Environment

- 6 Other Central & South America -- Food Safety

- Product Demand by Type & Market

- 7 Eastern Europe -- Food Safety Product

- Market Environment

- 8 Eastern Europe -- Food Safety Product

- Demand by Type & Market

- 9 Russia -- Food Safety Product

- Market Environment

- 10 Russia -- Food Safety Product

- Demand by Type & Market

- 11 Other Eastern Europe -- Food Safety

- Product Market Environment

- 12 Other Eastern Europe -- Food Safety Product

- Demand by Type & Market

- 13 Africa/Mideast -- Food Safety Product

- Market Environment

- 14 Africa/Mideast -- Food Safety Product

- Demand by Type & Market

INDUSTRY STRUCTURE

- General
- Market Share
 - Disinfectants & Sanitizers
 - Disinfection Equipment
 - Diagnostic Products
- Competitive Strategies
- Marketing & Distribution
- Cooperative Agreements
- Acquisitions & Divestitures
- LIST OF TABLES & CHARTS:
 - 1 World Food Safety Product Sales by Company, 2009
 - Cht World Food Safety Product Market Share, 2009
 - Cht World Food Safety Disinfectant & Sanitizer Market Share, 2009
 - Cht World Food Safety Disinfection Equipment Market Share, 2009
 - Cht World Food Safety Diagnostic Product Market Share, 2009
 - 2 Selected Cooperative Agreements
 - 3 Selected Acquisitions & Divestitures

Company Profiles

COMPANY PROFILES
 Profiles for 33 global industry players such as bioMerieux, Diversey, Ecolab, IDEXX Laboratories and Tetra Pak

NORTH AMERICA

Canada: Food Safety Product Demand

In 2009, Canada represented a US\$250 million market for food safety products, or nine percent of the total for North America. As is the case in the US, Canada features a relatively stringent regulatory environment regarding food safety and the country is a significant consumer of food safety products. The considerable size of Canada's processed food and beverage industries will also continue to support demand for food safety products, as will the presence of other significant markets, such as foodservice establishments, farms, retail and distribution operations, and the government. Disinfection and diagnostic products will remain the largest product segments by far (together, these product segments accounted for 88 percent of food safety product demand in Canada in 2009).

Through 2014, demand for food safety products in Canada is projected to reach \$300 million. Gains will be supported by the food and beverage processing industry, which will remain the largest segment (four quarters of total food safety product demand). The meat and dairy industries will produce 15 percent of food safety products. More specifically, the dairy industry will be supported by the country's sizable dairy industry. Dairy products will represent a significant market for disinfection equipment.

The continued monitoring of the food supply by the Canadian Food Inspection Agency (CFIA) will also provide strong incentive for food industry participants to use food safety products in order to avoid food contamination and avoid monetary penalties for any breach of food safety regulations. The CFIA regulates virtually all safety aspects of Canada's food industry, from inspection and packaging and labeling of food products, including domestically produced and imported items (for domestic or foreign consumption), as well as imported food products.

Copyright 2010 The Freedonia Group, Inc.

SAMPLE PAGE
 Explanations that support each table's data and forecasts

OTHER REGIONS

TABLE VII-4

BRAZIL -- FOOD SAFETY PRODUCT DEMAND BY TYPE & MARKET (million dollars)

Item	1999	2004	2009	2014	2019
Food & Beverage MVA (bil 2008\$)	5	4	0	0	5
\$ food safety/000\$ food & bev MVA	4	0	5	5	8
Food Safety Product Demand					
By Type:					
Disinfection Products					
Diagnostic Products					
Other Products					
By Market:					
Food Processing Plants					
Foodservice Establishments					
Other Markets					

SAMPLE TABLE
 Historical data for 1999, 2004 and 2009 as well as Freedonia forecasts for 2014 and 2019; data illustrated in over 90 tables and charts

Brazil: Suppliers -- A number of companies participate in Brazil's food safety product industry. Some have relatively small product lines or specialize in a specific market or product niche. Some of the larger domestic producers include Capuani, CEITEC and Quimica Natural Brasileira (Quinabra). Both Capuani and Quinabra supply food area disinfectants. For its part, CEITEC manufactures RFID tags that can be used to identify and track beef and dairy cattle through the supply chain.

In addition, some international producers of food safety products maintain manufacturing facilities in Brazil. These include France's bioMerieux; the US' Diversey, DuPont (via Qualicon) and Ecolab; and Switzerland's Tetra Laval International (via Tetra Pak International). For instance, bioMerieux maintains a plant in Rio de Janeiro, while Diversey has production facilities in Socorro. In October 2009, US-based Neogen formed a new subsidiary in Brazil, Neogen do

Copyright 2010 The Freedonia Group, Inc.

Freedonia's methods involve:

- Establishing consistent economic and market forecasts
- Using input/output ratios, flow charts and other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts and end users
- Researching a proprietary database that includes trade publications, government reports and corporate literature

Order Information

To order fill out the coupon below and mail to The Freedonia Group, or place your order by phone **toll free (800) 927-5900** (US) or **(440) 684-9600**, or by fax **(440) 646-0484**, or by e-mail at **info@freedoniagroup.com**

Free Handling and Shipping

There is **NO** charge for handling and UPS shipping in the US. Expect delivery in 3 to 5 days. Outside the US, Freedonia provides free airmail service. If you require express delivery, Freedonia provides this to you at cost.

Save Fifteen Percent

If you order three (3) different titles at the same time, you can receive a discount of 15%. **If your order is accompanied by a check, you may take a 5% cash discount** (discounts do not apply to corporate use licenses).

Credit Card Orders

You may charge your order to either **American Express, MasterCard** or **Visa**. Please include your credit card account number, expiration date and your signature.

Orders Outside of the US

Checks must be paid in US funds, drawn against a US bank and mailed directly to The Freedonia Group. For wire transfer instructions please contact our customer service department at **info@freedoniagroup.com**. Or you may use a credit card.

Corporate Use License

Now every decision maker in your organization can act on the key intelligence found in all Freedonia studies. For an additional \$2,300 you receive unlimited use of an electronic version (PDF) of the study. Place it on your Intranet, e-mail it to coworkers around the world, or print it as many times as you like! Order it today.

Online Access

The complete text and tables from our studies and reports can be purchased at our website **www.freedoniagroup.com** and through major commercial online hosts.

Other Titles from The Freedonia Group

World Flavors & Fragrances

Global demand for flavors and fragrances is projected to increase 4.3% annually to 2014. Overall advances will be stimulated by gains in food and beverage processing, the largest market. The best opportunities will be found in developing areas, particularly the Asia/Pacific region. This study analyzes the \$19 billion world flavor and fragrance industry, with forecasts for 2014 and 2019 by product, market, world region and for 19 countries. It also evaluates company market share and profiles industry players.

#2673..... 08/2010..... \$5800

World Specialty Silicas

World specialty silicas demand will rise 6.3% yearly through 2014, driven by growth in key silica markets such as tires, rubber, chemicals and agricultural products. Precipitated silica will remain the dominant product type and lead gains. The Asia/Pacific region will grow at the fastest pace. This study analyzes the two million metric ton world specialty silica industry, with forecasts for 2014 and 2019 by product, market, world region and for 14 countries. It also evaluates company market share and profiles industry participants.

#2644..... 06/2010..... \$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..... 04/2010..... \$4800

World Salt

Global salt demand will rise 2.6% yearly through 2013. Growth in developing countries will more than offset an expected contraction of salt demand in developed economies. The large chemical manufacturing market will generate most new demand, due to rapid growth in Chinese chemical production. This study analyzes the \$9.7 billion world salt industry, with forecasts for 2013 and 2018 by salt market, production method, world region and for 20 countries. It also evaluates company market share and profiles industry participants.

#2597..... 03/2010..... \$5700

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..... 07/2009..... \$4700

Need analysis on a topic not covered by Freedonia Industry Studies? Call Customer Service for details on **Freedonia Custom Research**

ORDER FORM

[Click here to purchase online](#)

Name: _____

Title: _____

Company: _____

Division: _____

Street: _____
(no PO Box please)

City/State/Zip: _____

Country: _____

Phone: _____ Fax: _____

e-mail: _____

TITLE

PRICE

World Food Safety Products

\$5800

Corporate Use License (add to study price) + \$2300

___ Additional Print Copies @ \$500 each

Total (including selected options): \$ _____

Enclosed is my check (5% discount) drawn on a US bank and payable to The Freedonia Group, Inc., in US funds (Ohio residents add 7.75% sales tax)

Bill my company American Express MasterCard Visa

Credit Card #

MONTH YEAR
Expiration Date

Signature: _____

F-WEB

The Freedonia Group, Inc. 767 Beta Drive Cleveland, OH 44143-2326 USA **website:** www.freedoniagroup.com
phone: 800-927-5900 (US) or 440-684-9600 **fax:** 440-646-0484 **e-mail:** info@freedoniagroup.com