

TABLE OF CONTENTS

INTRODUCTION ..... XXIX

    STUDY GOAL AND OBJECTIVES ..... XXIX

    REASON FOR DOING THE STUDY..... XXIX

    INTENDED AUDIENCE..... XXIX

    SCOPE OF REPORT ..... XXX

    INFORMATION SOURCES..... XXX

    ANALYST CREDENTIALS..... XXX

    RELATED BCC REPORTS ..... XXXI

    BCC RESEARCH ONLINE SERVICES ..... XXXI

    DISCLAIMER ..... XXXI

SUMMARY..... XXXII

*SUMMARY TABLE U.S. FOOD-SAFETY TESTING MARKET VALUE,  
    BY CONTAMINANT TYPE, THROUGH 2012 (\$ MILLIONS)*..... XXXIII

*SUMMARY FIGURE U.S. FOOD-SAFETY TESTING MARKET VALUE,  
    BY CONTAMINANT TYPE, 2006-2012 (\$ MILLIONS)*..... XXXIV

OVERVIEW ..... 1

    OVERVIEW (CONTINUED) ..... 1

    CONTAMINANTS TESTED MARKET VALUE ..... 2

*FIGURE 1 U.S. CONTAMINANTS TESTED MARKET SHARE, 2007 (%)*..... 2

        PATHOGENS ..... 3

            Foods Contaminated by Pathogens..... 3

*TABLE 1 FOODS CONTAMINATED BY PATHOGENS* ..... 3

*TABLE 1 (CONTINUED)*..... 4

        Sources of Pathogen Contamination..... 4

        Effects of Pathogen Contamination ..... 5

*TABLE 2 ANNUAL U.S. ILLNESSES CAUSED BY SELECTED  
    PATHOGENS*..... 6

        GENETICALLY MODIFIED ORGANISMS ..... 6

            Foods Contaminated by GMOs ..... 6

            Sources of GMO Contamination ..... 6

            Effects of GMO Contamination..... 7

        TOXINS ..... 7

            Foods Contaminated by Toxins..... 7

*TABLE 3 FOODS CONTAMINATED BY MYCOTOXINS* ..... 7

*TABLE 4 FOODS CONTAMINATED BY SEAFOOD TOXINS* ..... 8

        Sources of Toxin Contamination..... 8

        Effects of Toxin Contamination ..... 8

    RESIDUES ..... 8

        Foods Contaminated by Residues ..... 9

TABLE OF CONTENTS

Sources of Residue Contamination ..... 9  
 Effects of Residue Contamination..... 9  
 OTHER CONTAMINANTS ..... 10  
     Foods Contaminated with Other Contaminants ..... 10  
     Sources of Other Contaminants..... 10  
     Effects of Contamination with Other Contaminants ..... 10  
 TESTING TECHNOLOGIES MARKET VALUE ..... 10  
 FIGURE 2 U.S. TESTING TECHNOLOGIES MARKET SHARE, 2007 (%)..... 11  
 FOODS TESTED MARKET VALUE ..... 12  
 FIGURE 3 U.S. FOODS TESTED MARKET SHARE, 2007 (%)..... 12  
 PRODUCTS TESTED MARKET VALUE ..... 12  
 FIGURE 4 U.S. PRODUCTS TESTED MARKET SHARE, 2007 (%) ..... 13  
 TESTING SITES..... 13  
 REGULATORY ..... 14  
     FDA ..... 14  
         The Food Safety Enforcement Enhancement Act of 1997 ..... 15  
         The Bioterrorism Act of 2002 ..... 15  
         The Food Allergen and Consumer Protection Act of 2004 ..... 16  
         The National Uniformity for Food Act of 2006..... 16  
     USDA ..... 16  
         FSIS..... 16  
             CAHFSE ..... 17  
             Meat and Poultry Labeling..... 17  
             National Residue Program ..... 18  
         GIPSA..... 18  
         National Organic Standards Board ..... 18  
             Compost Tea Task Force ..... 18  
     DOC..... 19  
     DOD ..... 19  
     EPA ..... 19  
     JOINT EFFORTS..... 20  
     INTERNATIONAL ORGANIZATIONS ..... 20  
         International Organizations (Continued)..... 21  
 CONTAMINANTS TESTED ..... 22  
     MARKET VALUE ..... 22  
     TABLE 5 U.S. FOOD SAFETY TESTING MARKET, BY TYPE OF  
         CONTAMINANT, THROUGH 2012 (\$ MILLIONS)..... 22  
     FIGURE 5 U.S. FOOD SAFETY TESTING MARKET, BY TYPE OF  
         CONTAMINANT, 2006-2012 (\$ MILLIONS) ..... 23  
     PATHOGENS..... 23

TABLE OF CONTENTS

|  |    |
|--|----|
| MARKET VALUE .....   | 24 |
| <i>TABLE 6 U.S. PATHOGEN TESTING MARKET, BY TYPE, THROUGH 2012 (\$ MILLIONS)</i> .....     | 25 |
| <i>FIGURE 6 U.S. PATHOGEN TESTING MARKET, BY TYPE, 2006-2012 (\$ MILLIONS)</i> .....       | 25 |
| SALMONELLA .....   | 26 |
| Market Value .....   | 26 |
| <i>TABLE 7 U.S. SALMONELLA TESTING MARKET VALUE, THROUGH 2012 (\$ MILLIONS)</i> .....      | 27 |
| ESCHERICHIA COLI .....   | 28 |
| Market Value .....   | 29 |
| <i>TABLE 8 U.S. E. COLI TESTING MARKET VALUE, THROUGH 2012 (\$ MILLIONS)</i> .....         | 29 |
| LISTERIA .....   | 30 |
| Market Value .....   | 30 |
| <i>TABLE 9 U.S. LISTERIA TESTING MARKET VALUE, THROUGH 2012 (\$ MILLIONS)</i> .....        | 30 |
| CAMPYLOBACTER.....   | 31 |
| Market Value .....   | 32 |
| <i>TABLE 10 U.S. CAMPYLOBACTER TESTING MARKET VALUE, THROUGH 2012 (\$ MILLIONS)</i> .....  | 32 |
| STAPHYLOCOCCI .....  | 33 |
| Market Value .....   | 33 |
| <i>TABLE 11 U.S. STAPHYLOCOCCI TESTING MARKET VALUE, THROUGH 2012 (\$ MILLIONS)</i> .....  | 34 |
| SHIGELLA .....   | 35 |
| Market Value .....   | 35 |
| <i>TABLE 12 U.S. SHIGELLA TESTING MARKET VALUE, THROUGH 2012 (\$ MILLIONS)</i> .....       | 35 |
| OTHER BACTERIA .....   | 36 |
| Market Value .....   | 36 |
| <i>TABLE 13 U.S. OTHER BACTERIA TESTING MARKET VALUE, THROUGH 2012 (\$ MILLIONS)</i> ..... | 36 |
| Streptococcus .....  | 36 |
| Vibrio.....  | 37 |
| Clostridium .....  | 37 |
| Bacillus Cereus .....  | 38 |
| Yersinia Enterocolitica .....  | 38 |
| GENETICALLY MODIFIED ORGANISMS .....   | 38 |
| MARKET VALUE .....   | 39 |

TABLE OF CONTENTS

*TABLE 14 U.S. GMOS TESTING MARKET VALUE, THROUGH 2012 (\$ MILLIONS)*..... 40  
 TOXINS ..... 40  
     MARKET VALUE ..... 40  
*TABLE 15 U.S. TOXIN TESTING MARKET VALUE, BY TYPE, THROUGH 2012 (\$ MILLIONS)*..... 41  
*FIGURE 7 U.S. TOXIN TESTING MARKET SHARE, BY TYPE, 2006-2012 (\$ MILLIONS)*..... 41  
     MYCOTOXINS ..... 41  
         Market Value ..... 42  
*TABLE 16 U.S. MYCOTOXIN TESTING MARKET VALUE, THROUGH 2012 (\$ MILLIONS)*..... 43  
     Aflatoxins ..... 43  
     Citrinin..... 44  
     Ochratoxins..... 44  
     Patulin..... 45  
     Penicillic Acid ..... 45  
     Sterigmatocystin..... 45  
     Trichothecenes ..... 46  
         Fumonisin ..... 46  
         T-2 Toxin ..... 46  
         Vomitoxin ..... 47  
     Zearalenone..... 47  
     SEAFOOD TOXINS ..... 47  
         Market Value ..... 48  
*TABLE 17 U.S. SEAFOOD TOXIN TESTING MARKET VALUE, BY TYPE, THROUGH 2012 (\$ MILLIONS)*..... 48  
     Scombrototoxin ..... 48  
     Brevetoxin..... 49  
     Ciguatoxin..... 49  
     Domoic Acid ..... 50  
     Okadaic Acid..... 50  
     Saxitoxin ..... 51  
     Tetrodotoxin..... 51  
     RESIDUES ..... 51  
         MARKET VALUE ..... 51  
*TABLE 18 U.S. RESIDUE TESTING MARKET VALUE, BY TYPE, THROUGH 2012 (\$ MILLIONS)*..... 52  
*FIGURE 8 U.S. RESIDUE TESTING MARKET SHARE, BY TYPE, 2006-2012 (\$ MILLIONS)*..... 52  
     VETERINARY DRUG RESIDUES..... 53

TABLE OF CONTENTS

*TABLE 19 BANNED/CLOSELY REGULATED VETERINARY DRUGS IN U.S.*..... 53  
     Market Value ..... 54

*TABLE 20 U.S. VETERINARY DRUG RESIDUE TESTING MARKET VALUE, THROUGH 2012 (\$ MILLIONS)*..... 54  
     PESTICIDE RESIDUES..... 55  
         Market Value ..... 55

*TABLE 21 U.S. PESTICIDE RESIDUE TESTING MARKET VALUE, BY TYPE, THROUGH 2012 (\$ MILLIONS)*..... 56  
     Single Residues ..... 56  
         Market Value ..... 56

*TABLE 22 U.S. SINGLE-RESIDUE PESTICIDES TESTING MARKET VALUE, THROUGH 2012 (\$ MILLIONS)*..... 57  
     Fungicides ..... 57  
     Insecticides ..... 57  
     Herbicides..... 58  
         Herbicides ..... 59  
     Multi-Residues ..... 60  
         Market Value ..... 60

*TABLE 23 U.S. PESTICIDE MULTI-RESIDUE TESTING MARKET VALUE, THROUGH 2012 (\$ MILLIONS)*..... 61  
     Organophosphates ..... 61  
         Carbamates ..... 62  
         Chlorinated Hydrocarbons ..... 62  
         Organonitrogens ..... 63  
     OTHER CONTAMINANTS ..... 63  
         MARKET VALUE ..... 63

*TABLE 24 U.S. OTHER CONTAMINANTS TESTING MARKET VALUE, BY TYPE, THROUGH 2012 (\$ MILLIONS)*..... 63

*FIGURE 9 U.S. OTHER CONTAMINANTS TESTING MARKET SHARE, BY TYPE, 2006-2012 (\$ MILLIONS)*..... 64  
     BSE PRIONS ..... 64  
         Market Value ..... 65

*TABLE 25 U.S. BSE PRION TESTING MARKET VALUE, THROUGH 2012 (\$ MILLIONS)*..... 66  
     ALLERGENS..... 66  
         Market Value ..... 67

*TABLE 26 U.S. ALLERGEN TESTING MARKET VALUE, THROUGH 2012 (\$ MILLIONS)*..... 67  
     MEAT SPECIES..... 67  
         Market Value ..... 67

TABLE OF CONTENTS

*TABLE 27 U.S. MEAT SPECIES TESTING MARKET VALUE, THROUGH 2012 (\$ MILLIONS)*..... 68  
     INDUSTRIAL CHEMICALS ..... 68  
         Market Value ..... 68

*TABLE 28 U.S. INDUSTRIAL CHEMICALS TESTING MARKET VALUE, THROUGH 2012 (\$ MILLIONS)*..... 69  
     Market Value (Continued)..... 70

TESTING TECHNOLOGY..... 71

*TABLE 29 CONTAMINANTS TESTED, BY TYPE OF TEST*..... 71  
     MARKET VALUE ..... 72

*TABLE 30 U.S. TESTING TECHNOLOGY MARKET VALUE, BY TYPE, THROUGH 2012 (\$ MILLIONS)*..... 72

*FIGURE 10 U.S. FOOD SAFETY TESTING MARKET, BY TYPE OF TECHNOLOGY, 2006-2012 (\$ MILLIONS)* ..... 73  
     RAPID ASSAYS ..... 73  
         MARKET VALUE ..... 73

*TABLE 31 U.S. RAPID ASSAY TESTS MARKET VALUE, BY TYPE, THROUGH 2012 (\$ MILLIONS)*..... 74  
     NUCLEIC ACID-BASED ASSAYS ..... 74  
         Market Value ..... 74

*TABLE 32 U.S. NUCLEIC ACID-BASED ASSAYS MARKET VALUE, BY CONTAMINANT TYPE, THROUGH 2012 (\$ MILLIONS)*..... 75  
     Nucleic Acid-Based Assays for Pathogens..... 75  
         Market Value ..... 75

*TABLE 33 U.S. NUCLEIC ACID-BASED ASSAYS FOR PATHOGENS MARKET VALUE, THROUGH 2012 (\$ MILLIONS)* ..... 76  
     Nucleic Acid-Based Assays for GMOs ..... 76  
         Market Value ..... 76

*TABLE 34 U.S. NUCLEIC ACID-BASED ASSAYS FOR GMOS MARKET VALUE, THROUGH 2012 (\$ MILLIONS)*..... 77  
     ANTIBODY-BASED..... 77  
         Antibody-Based (Continued) ..... 78  
         Market Value ..... 79

*TABLE 35 U.S. ANTIBODY-BASED ASSAYS MARKET VALUE, BY CONTAMINANT TYPE, THROUGH 2012 (\$ MILLIONS)*..... 79  
     Antibody-Based Assays for Pathogens ..... 80  
         Market Value ..... 80

*TABLE 36 U.S. ANTIBODY-BASED ASSAYS FOR PATHOGENS MARKET VALUE, THROUGH 2012 (\$ MILLIONS)* ..... 80  
     GMOs ..... 81

## TABLE OF CONTENTS

|   |    |
|---|----|
| Market Value .....  | 81 |
| <i>TABLE 37 U.S. ANTIBODY-BASED ASSAYS FOR GMOS MARKET</i>    |    |
| <i>VALUE, THROUGH 2012 (\$ MILLIONS)</i> .....                | 81 |
| Antibody-Based Assays for Toxins.....                         | 81 |
| Market Value .....  | 82 |
| <i>TABLE 38 U.S. ANTIBODY-BASED ASSAYS FOR TOXINS MARKET</i>  |    |
| <i>VALUE, THROUGH 2012 (\$ MILLION)</i> .....                 | 82 |
| Antibody-Based Assays for Residues .....                      | 82 |
| Market Value .....  | 83 |
| <i>TABLE 39 U.S. ANTIBODY-BASED ASSAYS FOR RESIDUES</i>       |    |
| <i>MARKET VALUE, THROUGH 2012 (\$ MILLION)</i> .....          | 83 |
| Antibody-Based Assays for Other Contaminants .....            | 84 |
| Market Value .....  | 84 |
| <i>TABLE 40 U.S. ANTIBODY-BASED ASSAYS FOR OTHER</i>          |    |
| <i>CONTAMINANTS MARKET VALUE, THROUGH 2012</i>                |    |
| <i>(\$ MILLIONS)</i> .....                                    | 84 |
| CULTURE MEDIA .....   | 85 |
| MARKET VALUE .....  | 85 |
| <i>TABLE 41 U.S. CULTURE MEDIA TESTS MARKET VALUE, BY</i>     |    |
| <i>CONTAMINANT TYPE, THROUGH 2012 (\$ MILLIONS)</i> .....     | 86 |
| CHROMATOGRAPHY.....   | 87 |
| MARKET VALUE .....  | 87 |
| <i>TABLE 42 U.S. CHROMATOGRAPHY TESTS MARKET VALUE, BY</i>    |    |
| <i>CONTAMINANT TYPE, THROUGH 2012 (\$ MILLIONS)</i> .....     | 88 |
| CHROMATOGRAPHY FOR TOXINS.....                                | 88 |
| Market Value .....  | 89 |
| <i>TABLE 43 U.S. CHROMATOGRAPHY TOXIN TESTS MARKET VALUE,</i> |    |
| <i>THROUGH 2012 (\$ MILLIONS)</i> .....                       | 89 |
| CHROMATOGRAPHY FOR RESIDUES.....                              | 89 |
| Market Value .....  | 89 |
| <i>TABLE 44 U.S. CHROMATOGRAPHY RESIDUE TESTS MARKET</i>      |    |
| <i>VALUE, THROUGH 2012 (\$ MILLIONS)</i> .....                | 90 |
| EMERGING .....  | 90 |
| ACOUSTIC IMPEDANCE MEASUREMENT .....                          | 91 |
| BIOCHIPS/BIOSENSORS .....                                     | 91 |
| Cantilevers.....  | 91 |
| Lid Device .....  | 92 |
| Microarrays.....  | 92 |
| FLOW CYTOMETRY .....  | 93 |
| NANOCRYSTALS .....  | 93 |
| PHAGE LIGANDS .....   | 94 |

TABLE OF CONTENTS

FOODS TESTED ..... 95  
 MARKET VALUE ..... 95  
*TABLE 45 U.S. FOOD SAFETY TESTING MARKET VALUE, BY FOOD TYPE, THROUGH 2012 (\$ MILLIONS)*..... 95  
*FIGURE 11 U.S. FOOD SAFETY TESTING MARKET, BY TYPE OF FOOD TESTED, 2006-2012 (\$ MILLIONS)*..... 96  
 MEAT AND POULTRY ..... 96  
 MARKET VALUE ..... 97  
*TABLE 46 U.S. MEAT/POULTRY TESTING MARKET VALUE, BY CONTAMINANT, THROUGH 2012 (\$ MILLIONS)*..... 97  
 PATHOGENS IN MEAT/POULTRY ..... 98  
 Market Value ..... 98  
*TABLE 47 U.S. PATHOGEN TESTING IN MEAT/POULTRY TESTING MARKET VALUE, THROUGH 2012 (\$ MILLIONS)* ..... 99  
 RESIDUES IN MEAT/POULTRY ..... 99  
 Market Value ..... 100  
*TABLE 48 U.S. RESIDUE TESTING IN MEAT/POULTRY MARKET VALUE, THROUGH 2012 (\$ MILLIONS)*..... 100  
 OTHER CONTAMINANTS IN MEAT/POULTRY ..... 101  
 Market Value ..... 101  
*TABLE 49 U.S. OTHER CONTAMINANTS TESTING IN MEAT/POULTRY MARKET VALUE, THROUGH 2012 (\$ MILLIONS)* ... 101  
 DAIRY ..... 101  
 MARKET VALUE ..... 102  
*TABLE 50 U.S. DAIRY TESTING MARKET VALUE, BY CONTAMINANT, THROUGH 2012 (\$ MILLIONS)*..... 102  
 PATHOGENS IN DAIRY ..... 102  
 Market Value ..... 102  
*TABLE 51 U.S. PATHOGEN TESTING IN DAIRY MARKET VALUE, THROUGH 2012 (\$ MILLIONS)*..... 103  
 TOXINS IN DAIRY ..... 103  
 Market Value ..... 103  
*TABLE 52 U.S. TOXIN TESTING IN DAIRY MARKET VALUE, THROUGH 2012 (\$ MILLIONS)*..... 104  
 RESIDUES IN DAIRY ..... 104  
 Market Value ..... 104  
*TABLE 53 U.S. RESIDUE TESTING IN DAIRY MARKET VALUE, THROUGH 2012 (\$ MILLIONS)*..... 104  
 GRAINS ..... 105  
 MARKET VALUE ..... 105



TABLE OF CONTENTS

*TABLE 54 U.S. GRAINS TESTING MARKET VALUE, BY CONTAMINANT TYPE, THROUGH 2012 (\$ MILLIONS)..... 106*  
     PATHOGENS IN GRAINS ..... 106  
         Market Value ..... 106

*TABLE 55 U.S. PATHOGEN TESTING IN GRAINS MARKET VALUE, THROUGH 2012 (\$ MILLIONS)..... 106*  
     GMOS IN GRAINS..... 107  
         Market Value ..... 107

*TABLE 56 U.S. GMOS IN GRAINS MARKET VALUE, THROUGH 2012 (\$ MILLIONS)..... 107*  
     TOXINS IN GRAINS ..... 108  
         Market Value ..... 108

*TABLE 57 U.S. MYCOTOXIN TESTING IN GRAINS MARKET VALUE, THROUGH 2012 (\$ MILLIONS)..... 108*  
     RESIDUES IN GRAINS ..... 108  
         Market Value ..... 108

*TABLE 58 U.S. RESIDUE TESTING IN GRAINS MARKET VALUE, THROUGH 2012 (\$ MILLIONS)..... 109*  
     OTHER CONTAMINANTS IN GRAINS ..... 109  
         Market Value ..... 109

*TABLE 59 U.S. OTHER CONTAMINANTS IN GRAINS MARKET VALUE, THROUGH 2012 (\$ MILLIONS)..... 110*  
     PRODUCE..... 110  
     MARKET VALUE ..... 110

*TABLE 60 U.S. PRODUCE TESTING MARKET VALUE BY CONTAMINANT TYPE, THROUGH 2012 (\$ MILLIONS)..... 111*  
     PATHOGENS IN PRODUCE ..... 111  
         Market Value ..... 112

*TABLE 61 U.S. PATHOGEN TESTING IN PRODUCE MARKET VALUE, THROUGH 2012 (\$ MILLIONS)..... 112*  
     GMOS IN PRODUCE..... 112  
         Market Value ..... 113

*TABLE 62 U.S. GMOS TESTING IN PRODUCE MARKET VALUE, THROUGH 2012 (\$ MILLIONS)..... 113*  
     TOXINS IN PRODUCE ..... 113  
         Market Value ..... 113

*TABLE 63 U.S. TOXIN TESTING IN PRODUCE MARKET VALUE, THROUGH 2012 (\$ MILLIONS)..... 114*  
     RESIDUES IN PRODUCE ..... 114  
         Market Value ..... 114

TABLE OF CONTENTS

*TABLE 64 U.S. RESIDUE TESTING IN PRODUCE MARKET VALUE, THROUGH 2012 (\$ MILLIONS)*..... 115  
 EGGS ..... 115  
 MARKET VALUE ..... 116

*TABLE 65 U.S. EGGS TESTING MARKET VALUE, BY CONTAMINANT TYPE, THROUGH 2012 (\$ MILLIONS)*..... 116  
 FISH AND SEAFOOD ..... 117  
 MARKET VALUE ..... 117

*TABLE 66 U.S. FISH/SEAFOOD TESTING MARKET VALUE, BY CONTAMINANT TYPE, THROUGH 2012 (\$ MILLIONS)*..... 118  
 PATHOGENS IN FISH/SEAFOOD..... 118  
 Market Value ..... 118

*TABLE 67 U.S. PATHOGEN TESTING IN FISH/SEAFOOD MARKET VALUE, THROUGH 2012 (\$ MILLIONS)*..... 119  
 TOXINS IN FISH/SEAFOOD ..... 119  
 Market Value ..... 119

*TABLE 68 U.S. TOXIN TESTING IN FISH/SEAFOOD MARKET VALUE, THROUGH 2012 (\$ MILLIONS)*..... 120  
 RESIDUES IN FISH/SEAFOOD ..... 120  
 Market Value ..... 120

*TABLE 69 U.S. RESIDUE TESTING IN FISH/SEAFOOD MARKET VALUE, THROUGH 2012 (\$ MILLIONS)*..... 121  
 BEVERAGES ..... 121  
 MARKET VALUE ..... 122

*TABLE 70 U.S. BEVERAGES TESTING MARKET VALUE, BY CONTAMINANT TYPE, THROUGH 2012 (\$ MILLIONS)*..... 122  
 OTHER FOODS ..... 123  
 MARKET VALUE ..... 123

*TABLE 71 U.S. OTHER FOODS TESTING MARKET VALUE, BY CONTAMINANT TYPE, THROUGH 2012 (\$ MILLIONS)*..... 123  
 PATHOGENS IN OTHER FOODS ..... 123  
 Market Value ..... 124

*TABLE 72 U.S. PATHOGEN TESTING IN OTHER FOODS MARKET VALUE, THROUGH 2012 (\$ MILLIONS)*..... 124  
 RESIDUES IN OTHER FOODS..... 124  
 OTHER CONTAMINANTS IN OTHER FOODS..... 124  
 Market Value ..... 125

*TABLE 73 U.S. PATHOGEN TESTING IN OTHER FOODS MARKET VALUE, THROUGH 2012 (\$ MILLIONS)*..... 125

PRODUCTS TESTED ..... 126

**TABLE OF CONTENTS**

MARKET VALUE ..... 126

*TABLE 74 U.S. PRODUCTS TESTED MARKET VALUE, THROUGH 2012 (\$ MILLIONS)*..... 126

*TABLE 74 (CONTINUED)*..... 127

*FIGURE 12 U.S. FOOD SAFETY TESTING MARKET, BY TYPE OF PRODUCT TESTED, 2006-2012 (\$ MILLIONS)*..... 127

    RAW FOODS..... 127

        MARKET VALUE ..... 128

*TABLE 75 U.S. RAW FOODS TESTING MARKET VALUE, BY CONTAMINANT, THROUGH 2012 (\$ MILLIONS)*..... 128

    PATHOGENS IN RAW FOODS ..... 128

        Market Value ..... 128

*TABLE 76 U.S. PATHOGEN TESTING IN RAW FOODS MARKET VALUE, THROUGH 2012 (\$ MILLIONS)*..... 129

    Pathogens in Raw Meat/Poultry ..... 129

        Market Value ..... 129

*TABLE 77 U.S. PATHOGEN TESTING IN RAW MEAT/POULTRY MARKET VALUE, THROUGH 2012 (\$ MILLIONS)* ..... 130

    Pathogens in Raw Dairy..... 130

        Market Value ..... 131

*TABLE 78 U.S. PATHOGEN TESTING IN RAW DAIRY MARKET VALUE, THROUGH 2012 (\$ MILLIONS)*..... 131

    Pathogens in Raw Grains..... 131

        Market Value ..... 131

*TABLE 79 U.S. PATHOGEN TESTING IN RAW GRAINS MARKET VALUE, THROUGH 2012 (\$ MILLIONS)*..... 132

    Pathogens in Raw Produce..... 132

        Market Value ..... 132

*TABLE 80 U.S. PATHOGEN TESTING IN RAW PRODUCE MARKET VALUE, THROUGH 2012 (\$ MILLIONS)*..... 133

    Pathogens in Raw Eggs ..... 134

        Market Value ..... 134

*TABLE 81 U.S. PATHOGEN TESTING IN RAW EGGS MARKET VALUE, THROUGH 2012 (\$ MILLIONS)*..... 134

    Pathogens in Raw Fish..... 135

        Market Value ..... 135

*TABLE 82 U.S. PATHOGEN TESTING IN RAW FISH/SEAFOOD MARKET VALUE, THROUGH 2012 (\$ MILLIONS)* ..... 135

    Pathogens in Raw Beverages ..... 136

        Market Value ..... 136

## TABLE OF CONTENTS

|   |     |
|---|-----|
| <i>TABLE 83 U.S. PATHOGEN TESTING IN RAW BEVERAGES MARKET VALUE, THROUGH 2012 (\$ MILLIONS)</i> .....       | 136 |
| Pathogens in Raw Other Foods.....   | 136 |
| Market Value .....  | 137 |
| <i>TABLE 84 U.S. PATHOGEN TESTING IN RAW OTHER FOODS MARKET VALUE, THROUGH 2012 (\$ MILLIONS)</i> .....     | 137 |
| GMOS IN RAW FOODS.....  | 137 |
| Market Value .....  | 137 |
| <i>TABLE 85 U.S. GMOS TESTING IN RAW FOODS MARKET VALUE, THROUGH 2012 (\$ MILLIONS)</i> .....               | 138 |
| GMOs in Raw Grains .....  | 138 |
| Market Value .....  | 138 |
| <i>TABLE 86 U.S. GMOS TESTING IN RAW GRAINS MARKET VALUE, THROUGH 2012 (\$ MILLIONS)</i> .....              | 139 |
| GMOs in Raw Produce .....   | 139 |
| Market Value .....  | 139 |
| <i>TABLE 87 U.S. GMOS TESTING IN RAW PRODUCE MARKET VALUE, THROUGH 2012 (\$ MILLIONS)</i> .....             | 140 |
| TOXINS IN RAW FOODS .....   | 140 |
| Market Value .....  | 140 |
| <i>TABLE 88 U.S. TOXIN TESTING IN RAW FOODS MARKET VALUE, THROUGH 2012 (\$ MILLIONS)</i> .....              | 141 |
| Toxins in Raw Milk.....   | 141 |
| Market Value .....  | 141 |
| <i>TABLE 89 U.S. TOXIN TESTING IN RAW DAIRY MARKET VALUE, THROUGH 2012 (\$ MILLIONS)</i> .....              | 142 |
| Toxins in Raw Grains .....  | 142 |
| Market Value .....  | 142 |
| <i>TABLE 90 U.S. TOXIN TESTING IN RAW GRAINS MARKET VALUE, THROUGH 2012 (\$ MILLIONS)</i> .....             | 143 |
| Toxins in Raw Produce .....   | 144 |
| Market Value .....  | 144 |
| <i>TABLE 91 U.S. TOXIN TESTING IN RAW PRODUCE MARKET VALUE, THROUGH 2012 (\$ MILLIONS)</i> .....            | 144 |
| Toxins in Raw Fish.....   | 145 |
| Market Value .....  | 145 |
| <i>TABLE 92 U.S. TOXIN TESTING IN PROCESSED FISH/SEAFOOD MARKET VALUE, THROUGH 2012 (\$ MILLIONS)</i> ..... | 145 |
| RESIDUES IN RAW FOODS .....   | 145 |
| Market Value .....  | 145 |

## TABLE OF CONTENTS

|   |     |
|---|-----|
| <i>TABLE 93 U.S. RESIDUE TESTING IN RAW FOODS MARKET VALUE, THROUGH 2012 (\$ MILLIONS)</i> .....                    | 146 |
| Residues in Raw Meat/Poultry.....   | 146 |
| Market Value .....  | 147 |
| <i>TABLE 94 U.S. RESIDUE TESTING IN RAW MEAT/POULTRY MARKET VALUE, THROUGH 2012 (\$ MILLIONS)</i> .....             | 147 |
| Residues in Raw Dairy .....   | 147 |
| Market Value .....  | 148 |
| <i>TABLE 95 U.S. RESIDUE TESTING IN RAW DAIRY MARKET VALUE, THROUGH 2012 (\$ MILLIONS)</i> .....                    | 149 |
| Residues in Raw Grains .....  | 149 |
| Market Value .....  | 149 |
| <i>TABLE 96 U.S. RESIDUE TESTING IN RAW GRAINS MARKET VALUE, THROUGH 2012 (\$ MILLIONS)</i> .....                   | 150 |
| Residues in Raw Produce .....   | 150 |
| Market Value .....  | 151 |
| <i>TABLE 97 U.S. RESIDUE TESTING IN RAW PRODUCE MARKET VALUE, THROUGH 2012 (\$ MILLIONS)</i> .....                  | 151 |
| Pesticide Residues in Raw Eggs.....   | 152 |
| Residues in Raw Fish .....  | 152 |
| Market Value .....  | 152 |
| <i>TABLE 98 U.S. RESIDUE TESTING IN RAW FISH/SEAFOOD MARKET VALUE, THROUGH 2012 (\$ MILLIONS)</i> .....             | 152 |
| Residues in Raw Beverages.....  | 153 |
| Residues in Raw Other Foods .....   | 153 |
| OTHER CONTAMINANTS IN RAW FOODS .....   | 154 |
| Market Value .....  | 154 |
| <i>TABLE 99 U.S. OTHER CONTAMINANTS TESTING IN RAW FOODS MARKET VALUE, THROUGH 2012 (\$ MILLIONS)</i> .....         | 155 |
| Other Contaminants in Raw Meat/Poultry .....  | 155 |
| Market Value .....  | 155 |
| <i>TABLE 100 U.S. OTHER CONTAMINANTS TESTING IN RAW MEAT/POULTRY MARKET VALUE, THROUGH 2012 (\$ MILLIONS)</i> ..... | 156 |
| Other Contaminants in Raw Grains.....   | 156 |
| Market Value .....  | 156 |
| <i>TABLE 101 U.S. OTHER CONTAMINANTS TESTING IN RAW GRAINS MARKET VALUE, THROUGH 2012 (\$ MILLIONS)</i> .....       | 157 |
| PROCESSED FOODS.....  | 157 |
| MARKET VALUE .....  | 157 |

**TABLE OF CONTENTS**

*TABLE 102 U.S. PROCESSED FOODS TESTING MARKET VALUE, BY  
CONTAMINANT, THROUGH 2012 (\$ MILLIONS)..... 158*  
     PATHOGENS IN PROCESSED FOODS ..... 158  
         Market Value ..... 158

*TABLE 103 U.S. PATHOGEN TESTING IN PROCESSED FOODS  
MARKET VALUE, THROUGH 2012 (\$ MILLIONS) ..... 158*  
*TABLE 103 (CONTINUED)..... 159*  
     Pathogens in Processed Meat/Poultry ..... 159  
     Market Value ..... 159

*TABLE 104 U.S. PATHOGEN TESTING IN PROCESSED  
MEAT/POULTRY MARKET VALUE, THROUGH 2012 (\$ MILLIONS) .... 160*  
     Pathogens in Processed Dairy ..... 160  
     Market Value ..... 160

*TABLE 105 U.S. PATHOGEN TESTING IN PROCESSED DAIRY  
MARKET VALUE, THROUGH 2012 (\$ MILLIONS) ..... 161*  
     Pathogens in Processed Grains ..... 161  
     Market Value ..... 161

*TABLE 106 U.S. PATHOGEN TESTING IN PROCESSED GRAINS  
MARKET VALUE, THROUGH 2012 (\$ MILLIONS) ..... 162*  
     Pathogens in Processed Produce ..... 162  
     Market Value ..... 162

*TABLE 107 U.S. PATHOGEN TESTING IN PROCESSED PRODUCE  
MARKET VALUE, THROUGH 2012 (\$ MILLIONS) ..... 163*  
     Pathogens in Processed Eggs ..... 163  
     Market Value ..... 163

*TABLE 108 U.S. PATHOGEN TESTING IN PROCESSED EGGS  
MARKET VALUE, THROUGH 2012 (\$ MILLIONS) ..... 164*  
     Pathogens in Processed Fish/Seafood ..... 164  
     Market Value ..... 164

*TABLE 109 U.S. PATHOGEN TESTING IN PROCESSED  
FISH/SEAFOOD MARKET VALUE, THROUGH 2012 (\$ MILLIONS)..... 164*  
     Pathogens in Processed Beverages ..... 165  
     Market Value ..... 165

*TABLE 110 U.S. PATHOGEN TESTING IN PROCESSED  
BEVERAGES/JUICES MARKET VALUE, THROUGH 2012  
(\$ MILLIONS)..... 165*  
     Pathogens in Other Processed Foods ..... 166  
     Market Value ..... 166

*TABLE 111 U.S. PATHOGEN TESTING IN OTHER PROCESSED  
FOODS MARKET VALUE, THROUGH 2012 (\$ MILLIONS) ..... 167*  
     GMOS IN PROCESSED FOODS ..... 167

**TABLE OF CONTENTS**

Market Value ..... 167

*TABLE 112 U.S. GMOS TESTING IN PROCESSED GRAINS MARKET*

*VALUE, THROUGH 2012 (\$ MILLIONS)*..... 168

    TOXINS IN PROCESSED FOODS ..... 168

        Market Value ..... 168

*TABLE 113 U.S. TOXIN TESTING IN PROCESSED FOODS MARKET*

*VALUE, THROUGH 2012 (\$ MILLIONS)*..... 169

        Toxins in Processed Grains ..... 169

        Market Value ..... 169

*TABLE 114 U.S. TOXIN TESTING IN PROCESSED GRAINS MARKET*

*VALUE, THROUGH 2012 (\$ MILLIONS)*..... 170

        Toxins in Processed Produce ..... 170

        Toxins in Processed Fish ..... 170

        Market Value ..... 170

*TABLE 115 U.S. TOXIN TESTING IN PROCESSED FISH/SEAFOOD*

*MARKET VALUE, THROUGH 2012 (\$ MILLIONS)* ..... 171

        Toxins in Processed Beverages ..... 171

        Toxins in Other Processed Foods ..... 171

RESIDUES IN PROCESSED FOODS ..... 172

OTHER CONTAMINANTS IN PROCESSED FOODS ..... 172

    Market Value ..... 172

*TABLE 116 U.S. OTHER CONTAMINANTS TESTING IN PROCESSED*

*FOODS MARKET VALUE, THROUGH 2012 (\$ MILLIONS)* ..... 173

        Market Value (Continued)..... 174

INDUSTRY STRUCTURE AND COMPETITIVE ANALYSIS ..... 175

    INDUSTRY ENVIRONMENT..... 175

    MARKET INFLUENCES ..... 175

        Media..... 176

        Risk Groups ..... 176

*TABLE 117 U.S. POPULATION AND AGE GROUPS, 2001-2006*

*(MILLIONS)*..... 177

        Consumer Demands ..... 177

        Trade Policies..... 178

IMPORTANT STRATEGIES..... 178

    TEST DEVELOPMENT ..... 178

    CONSOLIDATIONS ..... 178

DRIVING FORCES..... 179

    REGULATIONS ..... 179

    PRICING..... 179

    TECHNOLOGY ..... 179

TABLE OF CONTENTS

CORPORATE LIABILITY ..... 180  
     Recalls ..... 180  
     Litigation..... 181  
 BUYER SPECIFICATIONS ..... 181

INTERNATIONAL ASPECTS ..... 182  
     REGIONAL MARKET SHARES..... 182  
     *FIGURE 13 GLOBAL TESTING MARKET SHARE, BY REGION, 2007*  
     (%)..... 183  
     CURRENT ISSUES ..... 184  
         IMPORTS ..... 184  
             Imports (Continued) ..... 185  
         GMOS ..... 186  
         TOXINS ..... 187  
         RESIDUES ..... 187  
             Residues (Continued) ..... 188  
         BSE ..... 189  
         ALLERGENS..... 190

PATENT ANALYSIS ..... 191  
     CONTAMINANT ACTIVITY..... 191  
     *FIGURE 14 CONTAMINANT ACTIVITY, BY TYPE, 2003-2007 (%)* ..... 191  
     PATHOGENS PATENT SAMPLE ..... 192  
     TOXINS PATENT SAMPLE..... 192  
     RESIDUES PATENT SAMPLE..... 192  
     GMOS PATENT SAMPLE..... 193  
     OTHER CONTAMINANTS PATENT SAMPLE..... 193  
     TECHNOLOGY ACTIVITY..... 193  
     *FIGURE 15 TECHNOLOGY ACTIVITY, BY TYPE, 2006-2007 (%)* ..... 194  
     CULTURE MEDIA PATENT SAMPLE..... 194  
     ANTIBODY-BASED RAPID ASSAY PATENT SAMPLE ..... 195  
     NUCLEIC ACID-BASED RAPID ASSAY PATENT SAMPLE ..... 195  
     CHROMATOGRAPHY PATENT SAMPLE ..... 195  
     EMERGING PATENT SAMPLE..... 196  
     ASSIGNEE ACTIVITY ..... 196  
     *FIGURE 16 ASSIGNEE ACTIVITY, 2006-2007 (%)* ..... 196  
     *FIGURE 16 (CONTINUED)* ..... 197  
     COMPANY PATENT SAMPLE..... 197  
     RESEARCH INSTITUTE PATENT SAMPLE..... 197  
     GOVERNMENT PATENT SAMPLE ..... 198  
     INDIVIDUAL PATENT SAMPLE..... 198



TABLE OF CONTENTS

UNIVERSITY PATENT SAMPLE ..... 198

REGIONAL ACTIVITY ..... 199

*FIGURE 17 REGIONAL ACTIVITY, 2006-2007 (%)*..... 199

ANNUAL ACTIVITY ..... 199

*FIGURE 18 ANNUAL ACTIVITY, 2006-2007 (%)*..... 200

COMPANY MARKET SHARES AND PROFILES ..... 201

MARKET SHARES ..... 201

PATHOGENS ..... 201

*FIGURE 19 U.S. PATHOGEN TESTING SUPPLIERS MARKET SHARE, 2007 (%)*..... 201

*FIGURE 19 (CONTINUED)* ..... 202

Major Suppliers ..... 202

*FIGURE 20 U.S. PATHOGEN TESTING SUPPLIERS MARKET SHARE, 2007 (%)*..... 202

DuPont Qualicon/Applied Biosystems ..... 203

3M Microbiology ..... 203

BioMérieux ..... 203

Others..... 204

BioControl Systems, Inc. .... 204

Strategic Diagnostics, Inc..... 204

GMO TEST SUPPLIERS ..... 205

*FIGURE 21 U.S. GMO TOXIN TEST SUPPLIERS MARKET SHARE, 2007 (%)*..... 205

Major Suppliers ..... 205

*FIGURE 22 U.S. MAJOR GMO TEST SUPPLIERS MARKET SHARE, 2007 (%)*..... 206

Promega Corp..... 206

Other Suppliers ..... 206

TOXINS ..... 207

*FIGURE 23 U.S. TOXIN TESTING SUPPLIERS MARKET SHARE, 2007 (%)*..... 207

Major Suppliers ..... 207

*FIGURE 24 U.S. MYCOTOXIN TESTING SUPPLIERS MARKET SHARE, 2007 (%)*..... 208

Vicam..... 208

Charm Sciences..... 209

Other Toxin Suppliers ..... 209

RESIDUE TEST SUPPLIERS..... 209

*FIGURE 25 U.S. RESIDUE TESTING SUPPLIERS MARKET SHARE, 2007 (%)*..... 209

TABLE OF CONTENTS

*FIGURE 25 (CONTINUED)* ..... 210

    BSE TEST SUPPLIERS..... 210

    ALLERGEN TEST SUPPLIERS ..... 211

    MEAT SPECIES TEST SUPPLIERS ..... 211

    MARGINAL SUPPLIERS ..... 211

        Marginal Suppliers (Continued) ..... 212

    COMPANY PROFILES ..... 213

*TABLE 118 SELECTED U.S. FOOD SAFETY TESTING SUPPLIERS*..... 213

    AGILENT TECHNOLOGIES, INC. .... 214

    APPLERA CORP. .... 214

        Applied Biosystems Group ..... 214

    BIOCONTROL SYSTEMS, INC. .... 215

    BIOMÉRIEUX S.A. .... 215

        BioMérieux Industry ..... 215

    BIO-RAD LABORATORIES, INC. .... 215

    CHARM SCIENCES, INC. .... 216

    DIONEX CORP. .... 216

    E. I. DU PONT DE NEMOURS & CO. .... 216

        DuPont Qualicon..... 217

    ELISA TECHNOLOGIES, INC. .... 217

    ENVIROLOGIX, INC. .... 217

    HARDY DIAGNOSTICS ..... 218

    IDEXX LABORATORIES, INC. .... 218

    INTERNATIONAL DIAGNOSTIC SYSTEMS CORP. .... 218

    3M COMPANY ..... 218

        3M Microbiology ..... 219

    NEOGEN CORP. .... 219

    OCEANIT LABORATORIES, INC. .... 219

    O.I. CORP. .... 220

    PERKINELMER, INC. .... 220

    PROMEGA CORP. .... 220

    R-BIOPHARM AG ..... 221

        R-Biopharm, Inc. .... 221

    ROCHE HOLDING, LTD. .... 221

        Roche Diagnostics Corp. .... 221

    STRATEGIC DIAGNOSTICS, INC. .... 222

    TAKARA HOLDINGS, INC. .... 222

        Takara Bio, Inc. .... 222

    TEPNEL BIOSYSTEMS, LTD. .... 223

        Tepnel Lifecodes ..... 223

    THERMO FISHER SCIENTIFIC ..... 223

**TABLE OF CONTENTS**

|                   |     |
|-------------------|-----|
| Oxoid, Ltd. ....  | 223 |
| Remel, Inc. ....  | 223 |
| WATERS CORP. .... | 224 |
| Vicam ....        | 224 |