

# TOP TEN SUPPLIERS OF FOOD SAFETY PRODUCTS AND TECHNOLOGY



**FOD053A**  
February 2013

Vijay Subramanian  
*Project Analyst*

ISBN: 0-89336-925-X

**bcc** | Research  
Market Forecasting

**BCC Research**  
49 Walnut Park, Building 2  
Wellesley, MA 02481  
866-285-7215, 781-489-7301  
[www.bccresearch.com](http://www.bccresearch.com)  
Custom Reports:  
[carol.laverty@bccresearch.com](mailto:carol.laverty@bccresearch.com)

**TABLE OF CONTENTS**

<b>TOPIC</b>	<b>PAGE NO.</b>
CHAPTER 1 INTRODUCTION	1
STUDY GOAL AND OBJECTIVES	1
INTENDED AUDIENCE	2
SCOPE	3
ABOUT THE AUTHOR	3
RELATED BCC REPORTS	3
BCC ONLINE SERVICES	3
DISCLAIMER	4
CHAPTER 2 FOOD SAFETY TESTING INDUSTRY-AN OVERVIEW	6
SIGNIFICANCE OF FOOD TESTING	6
ORGANIZATIONS INFLUENCING REGULATIONS IN FOOD SAFETY TESTING INDUSTRY	7
<i>TABLE 1 ORGANIZATIONS THAT ARE INFLUENTIAL IN FOOD QUALITY AND SAFETY TESTING</i>	8
VARIOUS METHODS OF PATHOGEN DETECTION	8
CHAPTER 3 FOOD SAFETY TESTING INDUSTRY AND MAJOR PLAYERS	11
INTERNATIONAL GIANTS	11
TESTING TECHNOLOGY DEVELOPERS	11
TESTING EQUIPMENT MANUFACTURERS	11
THIRD PARTY TESTING LABS	12
VETERINARY PRODUCT PROVIDERS	12
<i>TABLE 2 TOP 10 COMPANIES IN FOOD SAFETY TESTING INDUSTRY</i>	13
<i>TABLE 3 OTHER NOTABLE COMPANIES IN THE FOOD SAFETY TESTING INDUSTRY</i>	14
CHAPTER 4 THE TOP 10 COMPANIES IN THE INDUSTRY	16
3M FOOD SAFETY	16
COMPANY INFORMATION	16
PRODUCTS AND TECHNOLOGIES RELATED TO FOOD SAFETY	17
End Product Screening	17
3M Microbial Luminescence System (MLS)	17
Indicator Organism Testing	17
Pathogen and Toxin Testing	17
Rapid Hygiene Monitoring	18
Sample Handling, Media and Lab Supplies	18
Time Temperature Monitoring	18
COMPANY HISTORY	19
PRODUCT APPROVALS, CERTIFICATIONS AND AWARDS	19
EXECUTIVE OFFICERS OF 3M	21
Vice Presidents	21
Additional Officers	21
BOARD OF DIRECTORS	21
FINANCIALS	22
<i>TABLE 4 3M COMPANY FINANCIALS , 2007-2011 (\$ MILLIONS)</i>	22

<b>TOPIC</b>	<b>PAGE NO.</b>
<i>TABLE 5 3M COMPANY FINANCIALS FOR HEALTHCARE SEGMENT, 2008-2011 (\$ MILLIONS)</i>	23
<i>TABLE 6 3M COMPANY EMPLOYEE COUNT, 2007-2011</i>	23
<i>TABLE 7 U.S. PATENTS RELATED TO FOOD SAFETY ASSIGNED TO 3M SINCE 1976</i>	23
BIO MERIEUX	25
COMPANY INFORMATION	25
PRODUCTS AND TECHNOLOGIES	26
COMPANY HISTORY	27
COMPANY TIMELINE	30
COMPANY LOCATIONS	31
France	31
Marcy L'Etoile	31
Craponne	31
La Balme-les-Grottes	31
Saint-Vulbas	31
Grenoble	32
Combourg	32
Verniolle	32
Europe	32
Florence (Italy)	32
Madrid (Spain)	32
Basingstoke (U.K.)	32
North America	33
Durham	33
St. Louis	33
Lombard	33
San Diego	33
China	33
Shanghai Bio Merieux Kehua Bio-engineering	33
Bio Merieux (Shanghai) Biotech Co. Ltd.	33
Bio Merieux (Shanghai) Biological Products Co. Ltd.	33
Other Countries	34
Jacarepagua in Brazil	34
Australia	34
MEMBERS OF MANAGEMENT COMMITTEE	34
BOARD OF EXECUTIVE DIRECTORS	34
FINANCIALS	35
<i>TABLE 8 BIO MERIEUX COMPANY FINANCIALS , 2007-2011 (€ MILLIONS)</i>	35
<i>TABLE 9 BIO MERIEUX COMPANY REVENUE BREAK UP BY REGION, 2007-2011 (%)</i>	35
<i>TABLE 10 BIO MERIEUX COMPANY REVENUE BREAK UP BY TECHNOLOGY, 2007-2011 (%)</i>	36
<i>TABLE 11 BIO MERIEUX COMPANY PATENT OWNERSHIP AS REPORTED, 2007-2011</i>	36
<i>TABLE 12 U.S. PATENTS ASSIGNED TO BIO MERIEUX SINCE 1976</i>	36
BIO-RAD LABORATORIES INC.	41
COMPANY SEGMENTS	42

<b>TOPIC</b>	<b>PAGE NO.</b>
Life Science Segment	42
Clinical Diagnostics Segment	42
RESEARCH AND DEVELOPMENT	42
PRODUCTS AND TECHNOLOGIES	43
Water Testing	43
Wine Testing	43
Zoonosis Monitoring	43
COMPANY HISTORY	44
COMPANY TIMELINE	44
COMPANY LOCATIONS	46
Headquarters	46
Life Sciences Segment	46
Clinical Diagnostics Segment	46
CORPORATE OFFICERS	46
BOARD OF DIRECTORS	47
FINANCIALS	47
<i>TABLE 13 BIO-RAD COMPANY FINANCIALS, 2007-2011 (\$ MILLIONS)</i>	47
<i>TABLE 14 BIO-RAD COMPANY REVENUES BY SEGMENT, 2007-2011 (\$ MILLIONS)</i>	48
<i>TABLE 15 BIO-RAD COMPANY REVENUES BY GEOGRAPHICAL REGIONS, 2007-2011 (DATA IN \$ MILLIONS)</i>	48
<i>TABLE 16 U.S. PATENTS ASSIGNED TO BIO-RAD COMPANY SINCE 1976</i>	48
DUPONT QUALICON	59
COMPANY INFORMATION	59
PRODUCTS AND TECHNOLOGIES	60
BAX Detection System	60
RiboPrinter Microbial Characterization System	60
DuPont Lateral Flow System	60
DuPont StatMedia Soluble Packets	61
COMPANY HISTORY	61
COMPANY LOCATIONS	64
Business Locations	64
COMPANY EXECUTIVES	64
BOARD OF DIRECTORS	64
FINANCIALS	65
<i>TABLE 17 DUPONT COMPANY FINANCIALS, 2007-2011 (\$ MILLIONS)</i>	65
<i>TABLE 18 DUPONT COMPANY REVENUES BY REGION, 2007-2011 (\$ BILLIONS)</i>	65
<i>TABLE 19 DUPONT COMPANY NET REVENUES BY SEGMENT, 2007-2011 (\$ MILLIONS)</i>	66
<i>TABLE 20 DUPONT NUTRITION AND HEALTH SEGMENT FINANCIALS, 2009-2011 (\$ MILLIONS)</i>	66
<i>TABLE 21 DUPONT NUTRITION AND HEALTH SEGMENT COMPETITIVE LANDSCAPE</i>	67
<i>TABLE 22 DUPONT NUTRITION AND HEALTH SEGMENT SALES BY PRODUCT GROUP, INDUSTRY AND REGION, 2011 (%)</i>	67
<i>TABLE 23 U.S. PATENTS ASSIGNED TO DUPONT COMPANY RELATED TO QUALICON PRODUCTS SINCE 1976</i>	68
EUROFINS SCIENTIFIC S.E.	69
COMPANY INFORMATION	69

<b>TOPIC</b>	<b>PAGE NO.</b>
Growth Drivers	70
Professional Liability/Insurance	70
SEGMENTS AND LABORATORY SERVICE LOCATIONS	71
Food and Feed Testing	71
Environment Testing	71
Pharma Services-Early Development	71
Pharma Services-Central Laboratory	71
Pharma Services-Bio/Pharmaceutical and Products Testing	71
Agrosciences	71
Product Testing	71
Genomic Services	72
Forensics and Applied DNA Testing	72
REACH Services	72
COMPANY TIMELINE	72
COMPANY HISTORY	72
Turning Wine into a Winner in the 1980s	72
Acquiring Scale in the 1990s	73
Global Leader in the 2000s	74
2005 Onwards-Becoming a Global Reference	75
PRINCIPAL SUBSIDIARIES	76
GROUP EXECUTIVE COMMITTEE	76
BOARD OF DIRECTORS	77
FINANCIALS	77
<i>TABLE 24 EUROFINS SCIENTIFIC COMPANY FINANCIALS, 2007-2011 (€ MILLIONS)</i>	77
<i>TABLE 25 EUROFINS SCIENTIFIC COMPANY REVENUES BY REGION, 2007-2011 (€ MILLIONS)</i>	78
<i>TABLE 26 EUROFINS SCIENTIFIC COMPANY EMPLOYEES BY REGION, 2007-2011 (FULL-TIME EQUIVALENTS)</i>	78
<i>TABLE 27 U.S. PATENTS ASSIGNED TO EUROFINS SCIENTIFIC SINCE 1976</i>	78
FOSS A/S	79
COMPANY INFORMATION	79
TECHNOLOGIES	80
Technology Areas	80
PRODUCTS BY TECHNOLOGY	80
COMPANY MANAGEMENT	82
BOARD OF DIRECTORS	82
FINANCIALS	82
<i>TABLE 28 FOSS COMPANY FINANCIALS, 2009-2011 (€ MILLIONS)</i>	82
<i>TABLE 29 U.S. PATENTS ASSIGNED TO FOSS SINCE 1976</i>	83
IDEXX LABORATORIES	83
COMPANY INFORMATION	83
PRODUCTS AND TECHNOLOGIES	85
Companion Animal Group	85
Instruments and Consumables	85
Blood and Urine Chemistry	85
Hematology	86
Quantitative Immunoassay Testing	86

<b>TOPIC</b>	<b>PAGE NO.</b>
Urinalysis	86
Rapid Assays	86
Reference Laboratory Diagnostic and Consulting Services	87
Consulting Services	87
Practice Management Systems and Digital Radiography	87
Digital Radiography Systems and Services	88
Water	88
Livestock and Poultry Diagnostics	89
Other	89
Dairy	89
OPTI Medical Systems	90
PATENTS AND R&D	90
COMPANY HISTORY	91
COMPANY LOCATIONS	92
EXECUTIVE OFFICERS	93
BOARD OF DIRECTORS	94
FINANCIALS	94
<i>TABLE 30 IDEXX LABORATORIES COMPANY FINANCIALS (\$ MILLIONS)</i>	95
<i>TABLE 31 IDEXX COMPANY REVENUES BY SEGMENT, 2007-2011 (\$ MILLIONS)</i>	95
<i>TABLE 32 U.S. PATENTS ASSIGNED TO IDEXX LABORATORIES SINCE 1976</i>	96
LIFE TECHNOLOGIES CORP.	100
COMPANY INFORMATION	100
PRODUCTS AND TECHNOLOGIES	101
Life Sciences	102
Applied Sciences	103
Medical Sciences	103
COMPANY HISTORY	104
Invitrogen History	104
COMPANY TIMELINE	105
COMPANY LOCATIONS	105
United States	105
International Locations	106
CORPORATE MANAGEMENT	106
BOARD OF DIRECTORS	107
FINANCIALS	107
<i>TABLE 33 LIFE TECHNOLOGIES COMPANY FINANCIALS, 2007-2011 (\$ MILLIONS)</i>	107
<i>TABLE 34 LIFE TECHNOLOGIES COMPANY REVENUES BY SEGMENT (\$ MILLIONS)</i>	107
<i>TABLE 35 SELECTED U.S. PATENTS ASSIGNED TO LIFE TECHNOLOGIES SINCE 1976</i>	108
NEOGEN CORPORATION	113
COMPANY INFORMATION	113
COMPANY OPERATIONS	114
PRODUCTS AND TECHNOLOGIES	116
FOOD SAFETY SEGMENT	116
ANIMAL SAFETY SEGMENT	119

<b>TOPIC</b>	<b>PAGE NO.</b>
PROPRIETARY PROTECTION AND APPROVALS	121
RESEARCH AND DEVELOPMENT	122
COMPANY HISTORY	122
COMPANY LOCATIONS	123
MANAGEMENT	124
BOARD OF DIRECTORS	125
FINANCIALS	125
<i>TABLE 36 NEOGEN CORPORATION COMPANY FINANCIALS, 2008-2012 (\$ THOUSANDS)</i>	125
<i>TABLE 37 NEOGEN CORPORATION REVENUES BY SEGMENT, 2008-2012 (\$ THOUSANDS)</i>	126
<i>TABLE 38 NEOGEN CORPORATION REVENUES BY GEOGRAPHY, 2004-2012 (%)</i>	126
<i>TABLE 39 U.S. PATENTS ASSIGNED TO NEOGEN CORP. SINCE 1976</i>	126
THERMO FISHER SCIENTIFIC	127
COMPANY INFORMATION	127
Thermo Fisher Scientific Brands	128
BUSINESS SEGMENTS AND PRODUCTS	128
Analytical Technologies Segment	128
Chromatography and Mass Spectrometry	128
Chemical Analysis	130
Environmental and Process Instruments	130
Biosciences	131
Specialty Diagnostics Segment	132
Immunodiagnosics	132
Clinical Diagnostics	133
Microbiology	133
Anatomical Pathology	133
Healthcare Market Customer Channel	133
Laboratory Products and Services Segment	133
RESEARCH AND DEVELOPMENT	134
SIGNIFICANT RECENT ACQUISITIONS	134
Analytical Technologies	134
Specialty Diagnostics	134
Lab Products and Services	134
COMPANY HISTORY	134
BOARD OF DIRECTORS	135
COMPANY EXECUTIVES	136
FINANCIALS	136
<i>TABLE 40 FINANCIALS, 2007-2011 (\$ MILLIONS)</i>	136
<i>TABLE 41 THERMO FISHER SCIENTIFIC REVENUES BY SEGMENT, 2009-2011 (\$ MILLIONS)</i>	137
<i>TABLE 42 SELECTED U.S. PATENTS ASSIGNED TO THERMO FISHER SCIENTIFIC SINCE 1976</i>	137

**LIST OF TABLES**

<b>TABLE HEADING</b>	<b>PAGE NO.</b>
TABLE 1 ORGANIZATIONS THAT ARE INFLUENTIAL IN FOOD QUALITY AND SAFETY TESTING	8
TABLE 2 TOP 10 COMPANIES IN FOOD SAFETY TESTING INDUSTRY	13
TABLE 3 OTHER NOTABLE COMPANIES IN THE FOOD SAFETY TESTING INDUSTRY	14
TABLE 4 3M COMPANY FINANCIALS , 2007-2011 (\$ MILLIONS)	22
TABLE 5 3M COMPANY FINANCIALS FOR HEALTHCARE SEGMENT, 2008-2011 (\$ MILLIONS)	23
TABLE 6 3M COMPANY EMPLOYEE COUNT, 2007-2011	23
TABLE 7 U.S. PATENTS RELATED TO FOOD SAFETY ASSIGNED TO 3M SINCE 1976	23
TABLE 8 BIO MERIEUX COMPANY FINANCIALS , 2007-2011 (€ MILLIONS)	35
TABLE 9 BIO MERIEUX COMPANY REVENUE BREAK UP BY REGION, 2007-2011 (%)	35
TABLE 10 BIO MERIEUX COMPANY REVENUE BREAK UP BY TECHNOLOGY, 2007-2011 (%)	36
TABLE 11 BIO MERIEUX COMPANY PATENT OWNERSHIP AS REPORTED, 2007-2011	36
TABLE 12 U.S. PATENTS ASSIGNED TO BIO MERIEUX SINCE 1976	36
TABLE 13 BIO-RAD COMPANY FINANCIALS, 2007-2011 (\$ MILLIONS)	47
TABLE 14 BIO-RAD COMPANY REVENUES BY SEGMENT, 2007-2011 (\$ MILLIONS)	48
TABLE 15 BIO-RAD COMPANY REVENUES BY GEOGRAPHICAL REGIONS, 2007-2011 (DATA IN \$ MILLIONS)	48
TABLE 16 U.S. PATENTS ASSIGNED TO BIO-RAD COMPANY SINCE 1976	48
TABLE 17 DUPONT COMPANY FINANCIALS, 2007-2011 (\$ MILLIONS)	65
TABLE 18 DUPONT COMPANY REVENUES BY REGION, 2007-2011 (\$ BILLIONS)	65
TABLE 19 DUPONT COMPANY NET REVENUES BY SEGMENT, 2007-2011 (\$ MILLIONS)	66
TABLE 20 DUPONT NUTRITION AND HEALTH SEGMENT FINANCIALS, 2009-2011 (\$ MILLIONS)	66
TABLE 21 DUPONT NUTRITION AND HEALTH SEGMENT COMPETITIVE LANDSCAPE	67
TABLE 22 DUPONT NUTRITION AND HEALTH SEGMENT SALES BY PRODUCT GROUP, INDUSTRY AND REGION, 2011 (%)	67
TABLE 23 U.S. PATENTS ASSIGNED TO DUPONT COMPANY RELATED TO QUALICON PRODUCTS SINCE 1976	68
TABLE 24 EUROFINS SCIENTIFIC COMPANY FINANCIALS, 2007-2011 (€ MILLIONS)	77
TABLE 25 EUROFINS SCIENTIFIC COMPANY REVENUES BY REGION, 2007-2011 (€ MILLIONS)	78
TABLE 26 EUROFINS SCIENTIFIC COMPANY EMPLOYEES BY REGION, 2007-2011 (FULL-TIME EQUIVALENTS)	78
TABLE 27 U.S. PATENTS ASSIGNED TO EUROFINS SCIENTIFIC SINCE 1976	78
TABLE 28 FOSS COMPANY FINANCIALS, 2009-2011 (€ MILLIONS)	82
TABLE 29 U.S. PATENTS ASSIGNED TO FOSS SINCE 1976	83
TABLE 30 IDEXX LABORATORIES COMPANY FINANCIALS (\$ MILLIONS)	95
TABLE 31 IDEXX COMPANY REVENUES BY SEGMENT, 2007-2011 (\$ MILLIONS)	95
TABLE 32 U.S. PATENTS ASSIGNED TO IDEXX LABORATORIES SINCE 1976	96



---

<b>TABLE HEADING</b>	<b>PAGE NO.</b>
TABLE 33 LIFE TECHNOLOGIES COMPANY FINANCIALS, 2007-2011 (\$ MILLIONS)	107
TABLE 34 LIFE TECHNOLOGIES COMPANY REVENUES BY SEGMENT (\$ MILLIONS)	107
TABLE 35 SELECTED U.S. PATENTS ASSIGNED TO LIFE TECHNOLOGIES SINCE 1976	108
TABLE 36 NEOGEN CORPORATION COMPANY FINANCIALS, 2008-2012 (\$ THOUSANDS)	125
TABLE 37 NEOGEN CORPORATION REVENUES BY SEGMENT, 2008-2012 (\$ THOUSANDS)	126
TABLE 38 NEOGEN CORPORATION REVENUES BY GEOGRAPHY, 2004-2012 (%)	126
TABLE 39 U.S. PATENTS ASSIGNED TO NEOGEN CORP. SINCE 1976	126
TABLE 40 FINANCIALS, 2007-2011 (\$ MILLIONS)	136
TABLE 41 THERMO FISHER SCIENTIFIC REVENUES BY SEGMENT, 2009-2011 (\$ MILLIONS)	137
TABLE 42 SELECTED U.S. PATENTS ASSIGNED TO THERMO FISHER SCIENTIFIC SINCE 1976	137