

TOP TEN COMPANIES IN FORENSICS TECHNOLOGY



SAS020A

David Christofides
Project Analyst

ISBN:

bcc | Research
Market Forecasting

BCC Research
49 Walnut Park, Building 2
Wellesley, MA 02481
866-285-7215, 781-489-7301
www.bccresearch.com
Custom Reports:
carol.laverty@bccresearch.com

TABLE OF CONTENTS

TOPIC	PAGE NO.
CHAPTER 1 INTRODUCTION	2
STUDY GOAL AND OBJECTIVES	3
INTENDED AUDIENCE	4
SCOPE	4
RELATED BCC REPORTS	4
BCC ON-LINE SERVICES	4
DISCLAIMER	5
CHAPTER 2 MARKET SUMMARY AND SEGMENTATION	7
<i>TABLE 1 PROJECTED U.S. FORENSIC PRODUCT AND SERVICES MARKET BY SEGMENT (\$ MILLIONS)</i>	7
GROWTH IN THE FORENSICS MARKET	8
COMPARISON WITH LIFE SCIENCE EQUIPMENT MARKET	8
THE TOP 10	8
CHAPTER 3 THE TOP 10 FORENSIC TECHNOLOGY COMPANIES	11
INTRODUCTION	11
ACCESSDATA GROUP LLC.	12
PRODUCTS	13
<i>TABLE 2 ACCESSDATA FORENSICS PRODUCTS</i>	13
FINANCIALS	14
ACQUISITIONS	14
COMPETITION	14
MANAGEMENT	14
<i>TABLE 3 ACCESSDATA GROUP MANAGEMENT</i>	14
AGILENT TECHNOLOGIES	15
CHEMICAL ANALYSIS BUSINESS	16
LIFE SCIENCES BUSINESS	17
ACQUISITIONS	17
PRODUCT LINES	18
FINANCIALS	18
<i>TABLE 4 AGILENT TECHNOLOGIES REVENUES, 2012 (%)</i>	19
<i>TABLE 5 AGILENT TECHNOLOGIES REVENUES, 2011 AND 2012 (\$ MILLIONS/%)</i>	19
MANAGEMENT	20
<i>TABLE 6 AGILENT MANAGEMENT</i>	20
CELLMARK FORENSICS	20
PRODUCTS	21
Casework Services	21
Screening (Blood, Semen, Saliva Detection)	21
Short Tandem Repeat (STR) Analysis	21
STR Kits	22
Y-STR Analysis	22
Mitochondrial DNA (mtDNA)	22
Single Nucleotide Polymorphisms (SNPs)	23
Forensic Paternity	24
Expert Testimony	24

TOPIC	PAGE NO.
Case Review	24
Offender Testing	24
International Quality Assessment Scheme (IQAS)	25
ID-Secure	25
FINANCIALS	26
<i>TABLE 7 CELLMARK FORENSICS REVENUES, THROUGH 2011 (\$ BILLIONS)</i>	26
MANAGEMENT	27
<i>TABLE 8 CELLMARK MANAGEMENT</i>	27
ILLUMINA INC.	28
PRODUCT INITIATIVE	29
PRODUCTS	30
FORENSIC PRODUCTS AND SERVICES (FORENSIC GENOMICS)	30
Criminal Casework	30
Data Banks	31
Simultaneously Analyze Multiple Loci	32
Future Proofing for NGS	32
Missing Persons and Human Remains	32
Mass Fatalities	33
Improved Kinship Analysis	34
Suspect Identification and Phenotyping	34
ACQUISITIONS	34
POTENTIAL ACQUISITION	35
<i>TABLE 9 ILLUMINA ENTERPRISE VALUE</i>	36
FINANCIALS	36
<i>TABLE 10 ILLUMINA'S REVENUE GROWTH, 2009-2012</i>	36
MANAGEMENT	37
<i>TABLE 11 ILLUMINA MANAGEMENT</i>	37
LIFE TECHNOLOGIES CORP.	37
PRODUCT AREAS	38
PRODUCTS	39
<i>TABLE 12 LIFE TECHNOLOGIES FORENSICS PRODUCTS</i>	39
FORENSIC PRODUCT INITIATIVES	40
FORENSICS COLLABORATION	42
HISTORY AND ACQUISITIONS	43
FINANCIALS	45
<i>TABLE 13 LIFE TECHNOLOGIES REVENUE COMPARISON RESULTS OF OPERATIONS, (\$ MILLIONS/%)</i>	46
<i>TABLE 14 LIFE TECHNOLOGIES FIRST-HALF REVENUE RESULTS OF OPERATIONS, 2011 AND 2012 (%/\$ MILLIONS)</i>	46
THERMO FISHER SCIENTIFIC ACQUISITION OF LIFE TECHNOLOGIES	47
MANAGEMENT	48
<i>TABLE 15 LIFE TECHNOLOGIES MANAGEMENT</i>	48
PERKINELMER INC.	49
FORENSIC PRODUCTS	50
FINANCIALS	50
<i>TABLE 16 TOTAL REVENUE BY SEGMENT, 2009-2011 (\$ MILLIONS)</i>	51
MANAGEMENT	51
<i>TABLE 17 PERKINELMER MANAGEMENT</i>	51

TOPIC	PAGE NO.
PROMEGA CORPORATION	52
PRODUCT INITIATIVES	53
FINANCIALS	54
<i>TABLE 18 PROMEGA CORPORATION REVENUES, THROUGH 2012 (\$ MILLIONS)</i>	54
MANAGEMENT	54
<i>TABLE 19 PROMEGA MANAGEMENT</i>	54
SORENSEN FORENSICS	55
SERVICE OFFERINGS	56
Forensic DNA Testing	56
STR DNA Testing and Analysis	56
Mini STR Testing	56
Y STR Analysis and Interpretation	56
Lab Validation Services	57
Case Review and Expert Witness	57
DNA Identification of Missing Persons	57
NEW PRODUCT INITIATIVE	57
MANAGEMENT	58
<i>TABLE 20 SORENSON FORENSICS MANAGEMENT</i>	58
SPEX FORENSICS	59
PRODUCT AREAS	59
HORIBA SCIENTIFIC	60
THERMO SCIENTIFIC	60
PRODUCTS	61
<i>TABLE 21 THERMO SCIENTIFIC FORENSIC APPLICATIONS</i>	61
FINANCES	62
<i>TABLE 22 REVENUE SEGMENTS (\$)</i>	63
MANAGEMENT	63
<i>TABLE 23 THERMO FISHER MANAGEMENT</i>	63
CHAPTER 4 WATCH LIST: FORENSIC TECHNOLOGY COMPANIES	65
3M COGENT	65
PRODUCTS	65
3M ACQUISITION OF COGENT	66
BODE TECHNOLOGY INC.	67
DIFFERENTIATING PRODUCTS/TECHNOLOGY	68
OUTLOOK	68
FORENSIC FLUIDS	69
<i>TABLE 24 FORENSIC FLUIDS REVENUE, 2008-2012 (\$ MILLIONS)</i>	69
DIFFERENTIATING PRODUCTS/TECHNOLOGY	70
OUTLOOK	70
IBIS BIOSCIENCES	71
ACADEMIC COLLABORATION	72
FINANCIALS	73
<i>TABLE 25 IBIS FINANCIALS (\$ MILLIONS/%)</i>	73
L-1 IDENTITY SOLUTIONS	74
PRODUCTS	74
Biometric Identification	74

TOPIC	PAGE NO.
Finger and Palm	74
Face	74
Iris	75
Multi-biometric	75
Civilian Identification Management	75
Secure Credential Issuance Systems	76
Enterprise Access Solutions	76
SAFRAN ACQUISITION OF L-1 IDENTITY	76
QIAGEN	76
FORENSIC PRODUCTS	77
FINANCIALS	78
<i>TABLE 26 QIAGEN REVENUE THROUGH 2Q 2012 (\$ MILLIONS)</i>	78
CHAPTER 5 GLOSSARY OF FORENSIC TECHNOLOGY TERMS	80

LIST OF TABLES

TABLE HEADING	PAGE NO.
TABLE 1 PROJECTED U.S. FORENSIC PRODUCT AND SERVICES MARKET BY SEGMENT (\$ MILLIONS)	7
TABLE 2 ACCESSDATA FORENSICS PRODUCTS	13
TABLE 3 ACCESSDATA GROUP MANAGEMENT	14
TABLE 4 AGILENT TECHNOLOGIES REVENUES, 2012 (%)	19
TABLE 5 AGILENT TECHNOLOGIES REVENUES, 2011 AND 2012 (\$ MILLIONS/%)	19
TABLE 6 AGILENT MANAGEMENT	20
TABLE 7 CELLMARK FORENSICS REVENUES, THROUGH 2011 (\$ BILLIONS)	26
TABLE 8 CELLMARK MANAGEMENT	27
TABLE 9 ILLUMINA ENTERPRISE VALUE	36
TABLE 10 ILLUMINA'S REVENUE GROWTH, 2009-2012	36
TABLE 11 ILLUMINA MANAGEMENT	37
TABLE 12 LIFE TECHNOLOGIES FORENSICS PRODUCTS	39
TABLE 13 LIFE TECHNOLOGIES REVENUE COMPARISON RESULTS OF OPERATIONS, (\$ MILLIONS/%)	46
TABLE 14 LIFE TECHNOLOGIES FIRST-HALF REVENUE RESULTS OF OPERATIONS, 2011 AND 2012 (%/\$ MILLIONS)	46
TABLE 15 LIFE TECHNOLOGIES MANAGEMENT	48
TABLE 16 TOTAL REVENUE BY SEGMENT, 2009-2011 (\$ MILLIONS)	51
TABLE 17 PERKINELMER MANAGEMENT	51
TABLE 18 PROMEGA CORPORATION REVENUES, THROUGH 2012 (\$ MILLIONS)	54
TABLE 19 PROMEGA MANAGEMENT	54
TABLE 20 SORENSON FORENSICS MANAGEMENT	58
TABLE 21 THERMO SCIENTIFIC FORENSIC APPLICATIONS	61
TABLE 22 REVENUE SEGMENTS (\$)	63
TABLE 23 THERMO FISHER MANAGEMENT	63
TABLE 24 FORENSIC FLUIDS REVENUE, 2008-2012 (\$ MILLIONS)	69
TABLE 25 IBIS FINANCIALS (\$ MILLIONS/%)	73
TABLE 26 QIAGEN REVENUE THROUGH 2Q 2012 (\$ MILLIONS)	78