

HIGHLIGHTS FROM THE MICROBIOLOGY MARKET REPORT
By
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(Figures are in US dollars)

2004 Report

1. Microbiology testing in the industrial market to approach \$5.0 billion by 2008.
2. In 2003 worldwide microbiology testing exceeded over 1.1 billion – generating in excess of \$3.2 billion.
3. The main sectors covered under this report are:
 - a. Food processing
 - b. Beverage
 - c. Pharmaceutical
 - d. Personal care products
 - e. Environmental
 - f. Industrial process.
4. The worldwide microbiology testing will continue to grow for the next 5 years.
5. In 2008 the number of tests is projected to reach 1.5 billion with a market value of over \$4.9 billion.
6. In the words of SCI president Mr. Tom Weschler:

“The market value for these tests will grow at a faster rate than testing volumes. Driving this higher increase is a conversion from traditional microbiological testing methods to rapid methods.”

7. In 2003 the breakdown of tests by methods are as follows:

Traditional	79.8%	906.3 million tests.
Rapid	20.2%	230.2 million tests.

8. In 2008, the projected breakdown of tests are as follows:

Traditional	69.4% (-10.4%)	1.0 billion tests..
Rapid	30.6% (+10.4%)	0.5 billion tests.

9. All types of rapid methods will make significant gains in usage during the coming 5 year period.
10. According Mr. Weschler:

“With such solid growth prospects, this is a market that all diagnostic manufacturers need to understand and, where they are not currently present, possibly to enter.”

Food Micro 2005 Report - Food Processing Industry Only

1. In 2005, over 625 million microbiological tests were done in this sector alone with a market value greater than \$1.65 billion.
2. The food sector is the largest within the industrial microbiology market, representing close to 50% of the total market share.
3. From 1998 to 2004, this market sector has seen significant growth in microbiological testing with an annual average growth rate of 9.2%. This year it has normalized to a growth rate of 6.8%.
4. The short-term increase in annual growth rates between 1988 and 2004 is attributed to the one-time plant-wide audits done to document potential pathogen issues (under the HACCP program). Now the growth rates have returned to a more sustainable level.
5. The report projects that the worldwide food microbiology testing market will grow to 822.8 million tests in 2010 with a market value of \$2.4 billion. This represents an average annual growth rate of 5.6%.
6. According to SCI official Mr. Weschler:

“The market value for these tests will grow at a faster rate than testing volumes. Driving this higher increase is an acceleration of the conversion from traditional microbiological testing methods to rapid methods.”

7. The newer methods may have higher prices per test compared to traditional methods. However, they are being used more frequently because they provide faster results and/or easy to use.
8. In 2005, Traditional methods currently account about 65% of the total test market worldwide.
9. In 2005, the rapid microbiological methods are expected to account for about 220 million tests (~ 35%).
10. By 2010, number of tests done by traditional methods will be reduced by about 12.4%, representing about 428.2 million tests (~ 52%).
11. All types of rapid methods will make significant gains in usage during the coming 5 year period.
12. By 2010, the annual test volume of rapid methods will almost double to reach 394.6 million tests.

For more details : <http://www.strategic-consult.com/repspage2.htm>