

REPORT PROSPECTUS • PUBLISHED JULY 2025

SIXTH EDITION

# Industrial Microbiology Markets Report



# Table of Contents

## SECTION ONE: EXECUTIVE SUMMARY



Market Trends/Drivers.....	2
Market Structure .....	3
2029 Market Forecast .....	3
Strategic Consulting International, Inc. ....	4

## SECTION TWO: FOOD SAFETY MARKETS



Food Safety Sector Summary—2025–2029.....	5
ACT and Market Value .....	5
Market Growth .....	7
Recalls and Consumer Confidence .....	7
Whole Genome Sequencing.....	8
Laboratory Outsourcing .....	8
Demand for Speed .....	9
Some Complacency in Testing is Evident.....	10
Food Sector—Geographic Review .....	10
Food Sector—Organism Review .....	10
Food Sector—Regulatory Review Overview.....	11
Emerging Regulatory Trends .....	13
Food Sector—Topical Issues.....	13
USDA Plant Modernization .....	14
Impact on Sample Volumes.....	14

## SECTION THREE: BEVERAGES



Beverage Sector Summary – 2018 – 2025 .....	16
Beverage Sector Summary—2025–2029 .....	17
Beverage Sector – Organism Review.....	18
Beverage Sector – Method Review.....	18
Beverage Sector—Segment Breakdown .....	19
Beverage Sector – Geographic Review .....	20
Beverage Sector – Topical Issues.....	21

## SECTION FOUR: PHARMACEUTICALS



Pharmaceutical Sector .....	23
Summary—2014–2025.....	23
Pharmaceutical Sector— Segment Breakdown .....	24
Pharmaceutical Sector— Organism Review .....	25
Pharmaceutical Sector—Method Review.....	25
Pharmaceutical Sector— Regulatory Review .....	26
Pharmaceutical Sector— Topical Issues.....	27
Rapid and Improved Methods.....	27
Lab Automation .....	28
Focus on Pharmaceuticals in Asia .....	29

## SECTION FIVE: PERSONAL CARE/ COSEMETICS



PCP Sector Summary – 2025–2029 .....	32
PCP Sector—Geographic Review .....	33
PCP Sector—Segment Breakdown.....	34
PCP Sector—Organism Review.....	34
PCP Sector—Method Review.....	35
PCP Sector—Regulatory Review.....	35
Changes to USP <1119> .....	35
The Modernization of Cosmetics Regulation .....	35
Act of 2022 (MoCRA) .....	
PCP Sector—Topical Issues .....	36
Focus on Asia .....	37

## SECTION SIX: ENVIRONMENTAL WATER



Environmental Sector— Geographic Review .....	40
Environmental Sector— Market Value .....	41
Environmental Sector— Segment Review.....	41
Environmental Sector— Organism Review .....	41
Environmental Sector— Method Review .....	42
Environmental Sector— Topical Issues .....	42
Food Safety – Agricultural Water .....	42
EU Agricultural Water Re-Use Rules (2023) .....	43

## SECTION SEVEN: INDUSTRIAL PROCESSING SECTOR



Industrial Process Sector Summary—2018–2025 .....	45
2025 Market Summary.....	46
Industrial Process Sector – Geographic Summary.....	46
Industrial Process Sector Segment Review.....	46
Industrial Process Sector – Organism Review.....	47
Industrial Process Sector – Method Review.....	47
Bioburden.....	47
Identification.....	48
Test Practices .....	48
Industrial Process Sector— Regulatory Review .....	49
Note about Legionella Testing .....	49

## SECTION EIGHT: DIAGNOSTICS BUSINESS REVIEW



Market Review – Note on Revenue Estimates .....	50
Dx Companies – .....	53
Microbiology Product Range.....	53
Dx Companies—Sector Coverage Matrix .....	53

## SECTION NINE: DIAGNOSTIC COMPANIES

Dx Companies.....	54
BD, bioMerieux, Charles River Laboratories,	
Eurofins, Hygiena, IDEXX, Lonza,	
Millipore Sigma (Merck), Merieux NutriSciences	
Neogen, Sartorius, SGS, Thermo Fisher	

## SECTION TEN: REPORT RESEARCH METHODOLOGY



Industrial Microbiology – Market Structure .....	68
Industrial Microbiology – Test Definition.....	68
Summary .....	69

## SECTION ELEVEN: ABOUT STRATEGIC CONSULTING

Market Research .....	71
Strategy Development.....	71
Management and Tactical Implementation.....	71
Business Development.....	71
Due Diligence Consulting.....	71
Robert Ferguson, President.....	71
Strategic Consulting .....	72
Published Reports .....	72



# Industrial Microbiology Markets Report – Overview

**Industrial Microbiology Market Review: Fifth Edition (IMMR-6)** focuses on the microbiology testing practices in the industrial market. Generally, this testing is performed to assure product quality by processors and manufacturers of commodities or other products.



Industrial Microbiology Market Report, Fifth Edition (IMMR—6) is a new, extensively researched report of the greater than \$11 billion market for microbiological testing in the industrial market. IMMR—6 tracks and compares microbiology test volumes, market values and methods used by companies products across the six major sectors that constitute the Industrial Microbiology marketplace.

IMMR—6 presents test volumes and market values for the global industrial market with further analysis by market sectors, geographic regions, test methods, organisms tested and sample sources. IMMR—6 details historical and current test volumes and market values as well as projections through 2029 in detailed research, data, tables and graphs.

IMMR—6 is based on primary research with the quality assurance managers of production facilities in all six sectors of the industrial market.

## Industrial Microbiology—Market Structure

This Report separates the Industrial Microbiology Market into six primary sectors:

- Food (Section 2)
  - Protein
  - Dairy
  - Fruits Vegetables
  - Processed Foods
  - Ingredients

### Beverage (Section 3)

- Soft Drinks
- Bottled Water
- Juices
- Beer / Wine
- Functional Beverages

### Pharmaceutical (Section 4)

- Sterile Pharmaceuticals
- Classic Non-Sterile Pharmaceuticals/ API
- Biologics

### Personal Care Products (Section 5)

- Cosmetics
- Toiletries
- Household Products

### Environmental Water (Section 6)

- Drinking Water
- Wastewater Treatment
- Source Water
- Agricultural Water

### Industrial Process (Section 7)

- Paper Mills
- Utilities
- Power Generation/Turbines
- Water Treatment (Industrial)
- Oil & Gas
- Cooling Towers

## Industrial Microbiology—Test Definition

Analysis of the market sectors includes testing by organism and methods used in four geographic regions (North America, Europe, Asia and ROW (Rest of the World)) as well as a discussion of regulatory and topical issues specific to each sector. IMMR—6 also includes a special reviews of the pharmaceutical and Personal Care markets in India, China and Singapore.

IMMR—6 also includes a thorough discussion of market trends and drivers in each of the different sectors; a business review of the industrial diagnostics market including competition, consolidation and key success factors; and detailed

company profiles of 13 leading competitors.

IMMR-6 focuses on microbiology products (test kits and traditional methods) used in the Industrial Market. The report covers microbiology samples collected by the ~108,000 worldwide production facilities regardless of where the samples are analyzed. By taking this approach, it is possible to size the Industrial Microbiology Market in terms of both test volume and market value.

Methodology/Primary Research

Extensive primary market research is fundamental to every Strategic Consulting market report.

For IMMR-6, SCI collected testing data from more than >1,000 companies and processing locations >60 countries on 6 continents around the world.

Interview data and other information are analyzed using a combined bottom-up and top-down approach. For example, overall market estimates are derived from the test volume numbers

from production companies. These evidence-based estimates are then triangulated with other information gathered through SCI interviews and public information research.

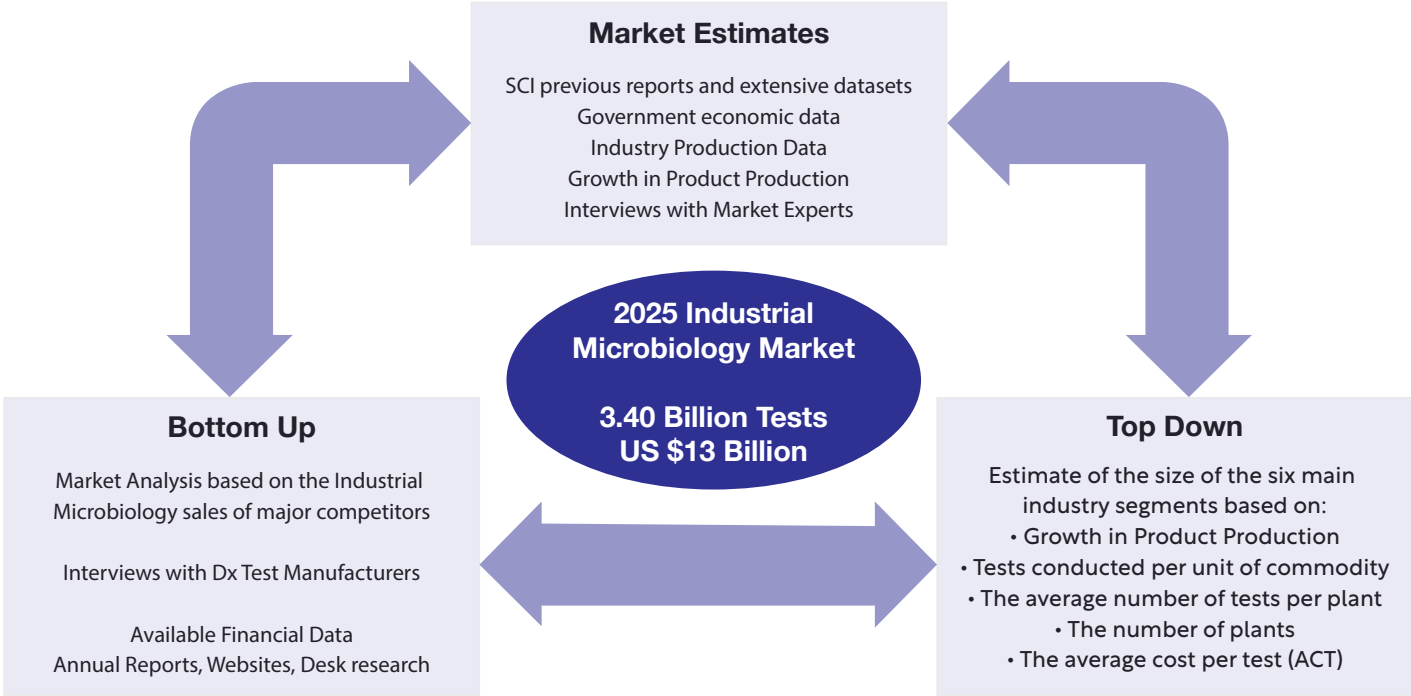
About Strategic Consulting International, Inc.

Founded in 1996, Strategic Consulting, Inc. (SCI) is the leading provider of market intelligence to industrial diagnostic companies, including publication of 20 comprehensive market reports over nearly 30 years.

SCI's market research reports are widely accepted by leading diagnostic manufacturers and investors as highly credible analyses of the industry. SCI's market research, business consulting and marketing communications services support industrial diagnostics companies providing microbiology-based quality and safety testing for the food, beverage, pharmaceutical and personal care product industries, and for environmental and industrial processing water.



Industrial Microbiology Market Methodology Top Down/Bottom Up Market Sizing



# Order Form and Subscription Agreement

Subscriber: To protect your investment in IMMR - 6, and that of other subscribers, for a period of two years from the published date, you agree:

1. not to copy or reproduce the report in whole or in part, by any means;
2. to restrict its circulation to our own company employees; and
3. to use all reasonable precautions to prevent the disclosure of the contents of the report to any other person or organization. It is understood that this report can be made available internally to our company and/or subsidiaries.

**Strategic Consulting International, Inc.:** SCI will employ all reasonable precautions to prevent the disclosure of the contents of IMMR- 6 to any person or organization other than subscribers for a period of two years from the published date.

**Please read and sign:** Complete the agreement below, and email the form to: Strategic Consulting International, Inc.  
info@strategic-consult.com , and we will contact you for payment and to finalize your order.

## Report

☐ IMMR-6 Report

## Price

\$6,500

Company: \_\_\_\_\_

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip/Postcode: \_\_\_\_\_

Country: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Authorization Signature: \_\_\_\_\_ Date: \_\_\_\_\_