

Neonatal Toxicology Market Size, Share & Trends Analysis Report By Specimen (Urine, Umbilical Cord), By Drug (Cannabinoids, Opioids), By Technology, By End Use, By Region, And Segment Forecasts, 2024 - 2030

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Abstracts

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Neonatal Toxicology Market Growth & Trends

The global neonatal toxicology market size is expected to reach USD 514.05 million by 2030, at a projected CAGR of 10.6% from 2024 to 2030, according to a new report by Grand View Research, Inc. The rising prevalence of neonatal disorders, such as neonatal abstinence syndrome (NAS) due to maternal drug use, drives the demand for neonatal toxicology testing and treatments. In addition, the development of advanced diagnostic technologies, such as mass spectrometers, improves the detection and management of toxic exposures in neonates, thereby propelling market growth.

This alarming trend underscores the urgent need for effective neonatal toxicology solutions. Over the past several decades, there have been significant advancements in drug screening tools, which now provide more accurate and precise results than ever before. Traditionally, drug testing has been performed using enzyme-linked immunosorbent assays (ELISAs). This method has several advantages: it is relatively inexpensive, easy to perform in a general laboratory, and has a rapid turnaround time. Moreover, the long-standing use of ELISA has resulted in the availability of multiple commercial antibodies validated for use in various human tissues. For certain tests, such as detecting cocaine metabolites in urine, ELISA is a reliable method. However, for other drug and tissue combinations, there is a relatively high incidence of

both false positives and negatives.

In addition, Mass General Brigham, Massachusetts' largest healthcare system, in April 2024 announced a significant shift in its approach to reporting suspected abuse or neglect in cases where a baby is born exposed to drugs. This policy change, now adopted by systems like Yale New Haven Children's Hospital and Boston Medical Center, signifies a broader trend toward more compassionate and evidence-based responses to substance use during pregnancy. Rather than reporting every instance of drug exposure at birth, these health systems will only report if there is reasonable cause to believe the infant is at risk of physical or emotional injury. This approach reflects a growing consensus that punitive measures lead to worse medical outcomes for both parent and child and disproportionately impact families of color and those with low socioeconomic status. This evolving policy landscape has profound implications for the neonatal toxicology testing industry. The shift away from punitive approaches towards more supportive and rehabilitative measures is expected to drive changes in the demand and utilization of neonatal toxicology tests.

With revised state laws in places like Connecticut, New Mexico, Washington, and Colorado and pending legislation in Massachusetts to protect mothers on prescribed medications for substance use disorder, the criteria for conducting toxicology tests may become more refined. This could lead to more targeted testing, ensuring that resources are used efficiently and that testing is conducted only when truly necessary. In addition, as the market shifts towards supportive care, there is significant potential for growth in emerging technologies that offer comprehensive and minimally invasive screening solutions. This includes advancements in technologies like high-resolution mass spectrometry and innovative biomarkers that can provide more detailed insights into neonatal exposure and health without extensive invasive procedures.

Neonatal Toxicology Market Report Highlights

Based on the specimen, meconium accounted for the largest revenue share in 2023. Meconium specimens offer a key advantage in neonatal toxicology by detecting drug exposure over the last trimester of pregnancy, providing a longer detection window.

Based on technology, mass spectroscopy dominated the market in 2023. Mass spectrometry is the gold standard in neonatal toxicology, offering unparalleled sensitivity and specificity for detecting drug exposure at nanogram levels. Its advantages include high accuracy, low

detection limits, and the ability to confirm positive results from initial screenings.

Based on the drug, the cannabinoids segment dominated the market in 2023 with the largest market share. Cannabinoid use during pregnancy is rising, with 2-5% of pregnant women self-reporting use and rates as high as 28% among low-income urban women. This increase is driven by legalization, perceived safety, and use for nausea.

Based on end use, the clinical laboratories segment dominated the market with the largest revenue share in 2023. Arup Laboratories and Quest Diagnostics are key players in the market, providing comprehensive testing services to detect prenatal drug exposure.

North America dominated the market due to the presence of a large number of major market players, the high prevalence of neonatal drug exposure, and the increasing awareness of the adverse effects of prenatal drug abuse.

The Asia Pacific region is expected to witness the fastest CAGR over the forecast period from 2024 to 2030. Due to the expansion of healthcare infrastructure and the implementation of public health initiatives aimed at reducing drug abuse during pregnancy, market growth is expected in this region.

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