

Drug Screening - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Abstracts

The Drug Screening Market size is estimated at USD 7.30 billion in 2024, and is expected to reach USD 15.60 billion by 2029, growing at a CAGR of 16.36% during the forecast period (2024-2029).

The global drug screening market is primarily fueled by factors such as the rise in drug and alcohol consumption, stringent alcohol and drug testing regulations, generous government funding for pharmaceutical research, and expedited regulatory approvals.

The increasing consumption of drugs is expected to increase demand for drug screening products which is anticipated to boost the market growth. For instance, approximately 83.4 million adults (29%) in the European Union have reportedly used illicit drugs at least once, according to the 2023 European Drug Report. Cannabis is the predominant illicit drug consumed in Europe, with an estimated 8% of European adults using it in 2022 based on national surveys. Thus, a high number of the population consumes drugs, which impacts the lives of individuals and is likely to increase demand for drug screening, thereby boosting segment growth.

Moreover, increasing consumption of drugs and alcohol and treatment is expected to increase demand for drug screening in hospital settings and thus likely to boost to market growth over the projected period. For instance, as per National statistics published by GOV. UK in December 2023, between April 2022 and March 2023, 290,635 adults received support for substance use issues. This is a small rise compared to the previous year 289,215. Moreover, the same source stated that the number of adults entering treatment from 2022 to 2023 was 137,749, which is higher than the previous 2 years' figures of 130,490 and 133,704. Thus, the rise in drug and alcohol consumption is often linked to public safety concerns and is likely to boost the

market growth.

Several laws and regulations mandate drug and alcohol testing in various sectors and implementation of such laws is expected to increase demand for drug screening products and devices, likely to contribute to the market growth over the forecast period. For instance, in November 2022, the Federal Motor Carrier Safety Administration (FMCSA) released updates outlining the drug and alcohol testing requirements were implemented by the FMCSA and its preceding agency. These regulations specify the individuals subject to testing, the frequency of testing, and the circumstances triggering testing. Additionally, the regulations safeguard employee privacy by limiting the use and disclosure of sensitive drug and alcohol testing information by employers and service agents.

Presence of key market players their continuous efforts to expand the drug screening products are expected to fuel the market growth. For instance:

In December 2023, test kits for date rape drugs are available in emergency rooms across all Quebec hospitals. These test kits can detect over 200 psychoactive substances, including gamma-hydroxybutyrate (GHB), called a date-rape drug.

Thus, growing alcohol and drug consumption and stringent regulation for drug screening as well as product launches is expected to contribute in market growth over the forecast period. Alcohol and drug consumption prohibitions in certain countries impede the global drug screening market's expansion. Restrictions on drug testing in workplaces, especially in developed economies, further hinder market growth.

Drug Screening Market Trends

Instruments Segment is Expected to Show Significant Growth Over the Forecast Period

The instruments used for drug screening include immune assays, gas chromatography, mass spectrometry, and various other instruments and color tests. Immunoassays are widely used due to their accuracy and rapid test results. Further, the chromatography and spectrometry instruments also offer accurate results for drug screening. Color tests involve reagents like Marquis reagent, Dille-Koppanyi reagent, Van Urk reagent, and Scott test, each reacting with specific substances to produce different colors. The benefits of drug screening instruments vary according to the detection window, ease of sampling, and potential for adulteration.

Factors such as the rise in benefits offered by the instruments for treating drug screening and the increase in research activities to demonstrate the advantages of different immune assays in screening drugs are expected to drive the segment's growth over the projected period.

Immunoassays are commonly utilized in clinical settings for swift detection of drugs in urine. Common formats of immunoassays used for drugs of abuse testing include EMIT (enzyme multiplied immunoassay technique), CEDIA (cloned enzyme donor immunoassay), chemiluminescent immunoassays (CLIA), KIMS (kinetic interaction of microparticle in solution), etc. Various key players across the globe have introduced and enhanced their advanced drug testing panels and immunoassays for drug screening purposes, which is expected to impact segment growth over the forecast period positively. For instance:

In December 2023, Quest Diagnostics, one of the significant provider of diagnostic information services, launched a new confirmatory testing service for novel psychoactive substances (NPS). The new panel, which tests for 88 compounds, covers a broad array of drug classes, such as designer opioids, designer benzodiazepines, designer stimulants, fentanyl analogs, synthetic cannabinoids, and other illicit additives.

In October 2023, ProciseDx Inc. received de novo FDA clearance for the therapeutic drug monitoring (TDM) tests for adalimumab (Humira and biosimilar Amgevita) and infliximab (Remicade and biosimilars Inflectra and Renflexis). These assays, called Procise ADL and Procise IFX, are used to quantify adalimumab (ADL) and infliximab (IFX) in patients suffering from inflammatory bowel diseases (IBD) who are taking these drugs. ProciseDx planned to commercialize these first FDA-cleared infliximab and adalimumab drug monitoring tests in Q4 2023.

Therefore, owing to the above-mentioned factors, such as the benefits of various instruments in drug screening and other strategic product launches, the studies segment is expected to witness a notable growth over the forecast period.

North America is Expected to Hold Significant Share in the Market Over The Forecast Period

North America is anticipated to maintain a substantial market share in the drug screening industry owing to the concerning issue of excessive alcohol consumption.

The prevalent use of illicit drugs, coupled with government funding allocated for combating drug abuse, further contributes to the demand for drug screening. Stringent regulations within the region provide an additional impetus for drug screening practices.

The growing substance abuse rates fuel the need for drug screening in healthcare facilities and workplace facilities, which is anticipated to contribute to market growth. For instance, in February 2023, according to an article published by Pennsylvania State University, around 63% of adults aged 18 years and above were reported to alcohol consumption in the United States in 2022. Among these, males (66%) had higher alcohol consumption as compared to females (61%). Thus, the large number of alcohol consumers raises the need for drug-testing products and services and is likely to drive market growth.

The stringent government regulations that need drug testing in different sectors like transportation raise the usage of drug screening products and are anticipated to fuel the market growth. For instance, in May 2023, the United States Department of Transportation regulated the drug testing program by including oral fluid testing to improve safety and reduce the chances of cheating involved with urine drug tests. Thus, such stringent regulations for identifying drug users are expected to increase the usage of drug screening products in the United States, thereby propelling the market growth.

The increasing research activities for the technological advancements in drug testing products are expected to fuel the market growth. For instance, in June 2023, the National Institutes of Health (NIH) and the FDA) emphasized more research for the improvement and implementation of drug-checking tools, such as fentanyl test strips, which are beneficial for reducing drug-related harms, and saving lives of substances abuse users with overdose. Thus, such research activities for the development of advanced drug screening products will likely to be adopted for the determination of drug users and is anticipated to drive the market growth in the region over the projected period.

The presence of industry players and their continuous efforts to develop advanced drug screening products are expected to bolster the country's market growth. For instance:

In December 2023, Quest Diagnostics introduced the new confirmatory testing service panel test for novel antipsychotic substances. This 88-compound panel test includes different drug classes, such as opioids, benzodiazepines, stimulants, fentanyl analogs, synthetic cannabinoids, and other illicit additives. Thus, this new panel test will assist healthcare workers in identifying drug misuse among patients prescribed controlled

medications, such as opioids and other substances.

In February 2023, according to the norms of law, individuals in Minnesota are required to undergo saliva drug testing to determine the presence of drugs, alcohol, cannabis, and other metabolites while applying for jobs.

Therefore, owing to the growing prevalence of alcohol and other drugs consumption and increasing government regulations coupled with the new products and services launched, the market studied is likely to grow in the region during the forecast period.

Drug Screening Industry Overview

The drug Screening Market is moderately fragmented in nature due to the presence of several companies operating globally as well as regionally. The key players operating in the global drug screening market are LabCorp (Laboratory Corporation of America Holdings), Quest Diagnostics, Abbott Laboratories, Thermo Fisher Scientific, Inc., Alfa Scientific Designs, Inc., OraSure Technologies, Inc., Siemens Healthineers, F. Hoffmann-La Roche Ltd, Shimadzu Corporation, LifeLock Technologies, Drägerwerk AG & Co. KGaA, and Premier Biotech, Inc.

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