

Global At-Home Drug of Abuse (DOA) Testing - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

Market Report | 2024-02-17 | 110 pages | Mordor Intelligence

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Report description:

The Global At-Home Drug of Abuse Testing Market size is estimated at USD 719.78 million in 2024, and is expected to reach USD 933.61 million by 2029, growing at a CAGR of 5.34% during the forecast period (2024-2029).

The studied market was impacted by the pandemic. With the advent of the pandemic, owing to the restrictions imparted by several governments on the travel and supply chain, the usual patterns of drug abuse were impacted throughout the world. The temporary bans affected the shipping of illicit drugs across the world, which widely impacted the market. According to the World Drug Report 2022, during the COVID-19 pandemic, there was an overall increase in the consumption of alcohol, tobacco, and cannabis, especially in the initial stages of the lockdowns. There was an increase in the consumption volumes owing to an increase in the frequencies and quantities of cannabis use, with herbal cannabis occupying a major portion.

The same source indicated that there was an increase in the non-medical use of sedatives, such as benzodiazepines, tranquilizers, and other psychiatric pharmaceuticals. However, there was a reduction in drug use among adolescents due to the lack of availability due to travel restrictions and social distancing, and close parental monitoring.

Also, owing to the reduction in the supply of illicit drugs, there was an increase in the local production of such drugs, which acted as an important factor adding to the market growth. For instance, according to an article titled 'Impact of COVID-19 Controls on the Use of Illicit Drugs and Alcohol in Australia' published in August 2021, there was a significant reduction in the availability of methamphetamine in Australia during the period of February to June 2020. Nonetheless, there was a considerable increase in the consumption of cannabis, along with other locally produced drugs. The use of such locally produced drugs is expected to boost the growth of the at-home drug abuse testing market. Thus, the market was adversely impacted by the pandemic however, it is expected to grow in the future.

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Illicit drugs refer to substances that are illegal and highly addictive and can either stimulate or inhibit the central nervous system. The rise in the use and production of illicit drugs is expected to play a vital role in the growth of the at-home drug of abuse (DOA) testing market. There has been an increase in the use of illicit drugs around the world. For instance, according to the World Drug Report 2022 published by the United Nations in June 2022, cannabis had the greatest number of users in the world with over 209 million users in the year 2020. Opioids came second with over 61 million users consuming opioids for non-medical reasons. In the year 2020, 34 million people had used amphetamines, an estimated 20 million people used ecstasy, and around 21 million people used cocaine-type substances. The report also indicated that there had been an overall increase in the use of the drugs during the year 2019-2020. This increase in the use of such drugs is expected to boost the growth of the at-home DOA testing market.

Moreover, the rise in the production of illicit drugs is also aiding market growth. For instance, according to an article by the White House on poppy cultivation and potential heroin production in Mexico, the Office of National Drug Control Policy (ONDCP) indicated that in the year 2021, there was an increase in poppy cultivation in Mexico by 23%, from 23,200 hectares in 2020 to 28,600 hectares in 2021. Also, the potential pure production of heroin increased by 22%, from 59 metric tons in 2020 to 72 metric tons in 2021. This increasing production is expected to significantly propel the growth of the at-home DOA testing market over the forecast period.

Various government organizations around the world have established measures to curb the incidences of drug abuse. The White House in its National Drug Control Strategy published in April 2022 focused on measures to reduce the number of overdose deaths in the nation in the short term and the reduction of drug abuse and its damaging consequences over the longer term. The article indicated that as per the 2020 National Survey on Drug Use and Health (NSDUH), around 20 million people living in the United States affected by drug overdose were not receiving addiction treatment services. The rising necessity of the treatment has pressured the government to formulate measures to help improve the conditions of people undergoing drug abuse, which is expected to add to the growth of the studied market over the forecast period. Thus, the abovementioned factors are expected to increase the market growth.

However, lack of awareness of these testing devices is a constraint to the market growth.

At-Home Drug of Abuse (DOA) Testing Market Trends

Test Strip Segment is Expected to Hold a Significant Market Share Over the Forecast Period

Factors such as increasing drug overdose, research studies to understand the benefits of at-home drug test strips coupled with initiatives such as product launches by key market players are expected to increase the market growth.

Increasing drug overdose is one of the key factors to increasing the adoption of at-home drug testing strips. For instance, in February 2022, an article published by the Centers for Disease Control and Prevention titled "Provisional Drug Overdose Death Counts" stated that the Covid-19 pandemic has resulted in an increased risk of using drugs alone, changes to the drug supply, and initiation or increased use of substances by individuals. Thus, increasing drug-induced overdose is expected to increase the adoption of testing strips thus increasing the market growth.

In August 2022, a research study titled "Take-Home Drug Checking as a Novel Harm Reduction Strategy in British Columbia, Canada" was conducted by Vancouver Coastal Health (VCH), the BC Centre on Substance Use (BCCSU), the BC Centre for Disease Control (BCCDC), Interior Health (IH), and the First Nations Health Authority (FNHA), which was published in the International Journal of Drug Policy. The study proved how useful it is to provide fentanyl test strips for take-home use. Using take-home test strips and staff testing at harm reduction centres, researchers compared the rates of fentanyl detection. The take-home fentanyl test strips had positivity rates of 90% compared to 89.1% among 1,768 opioid drug samples examined. These rates were

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comparable to those achieved by trained staff at harm reduction centres.

Similarly, in April 2022, an article published titled "At-home test strips can detect fentanyl-but that's just the first step to preventing overdoses" stated that Alabama, Tennessee, and New Mexico all decriminalized the sale of test strips. Thus, increasing decriminalization of testing strips is another factor in market growth. Thus, the abovementioned factors are expected to increase segment growth.

North America Dominates the Market and Expected to do Same in the Forecast Period

North America is expected to dominate the overall market, throughout the forecast period. The dominant position of the market in this region is mainly due to the high number of people who are suffering from substance abuse and initiatives by the government. The rise in the use of illicit drugs in the region is likely to support the growth of the market. For instance, according to the updates in September 2022 by the Center for Diseases Control and Prevention, 13.0% of those aged 12 and up reported using illicit drugs in 2019. 1.9% of those aged 12 and up used a psychotherapeutic substance for nonmedical purposes in 2019. Thus, increasing the use of illicit drugs in the country and the demand for at-home drug abuse testing, thereby boosting the market growth.

Moreover, various initiatives are taken by the government to reduce drug abuse throughout support the market expansion through the forecast period. For instance, in September 2021, United Nations on Drugs and Crime reduce the drug can youngsters. Every year UNODC can promote drug use created and youth.

Similarly, in July 2021, the Canadian government announced the start of the national call for proposals (CFP) for Health Canada's Substance Use and Addictions Program for 2021. (SUAP). As part of the USD 116 million investment in Budget 2021, Health Canada is continuing to build successful community-based programs that can help prevent, treat, and/or reduce the harms associated with opioids, stimulants, alcohol, prescription drugs, and other substances that have a high risk of problematic use through this call for proposals. Such initiatives create awareness among the support about drug abuse which is likely to support the growth of the market. Thus, the aforementioned factors are expected to increase the market growth.

At-Home Drug of Abuse (DOA) Testing Industry Overview

The At-Home Drug of Abuse (DOA) Testing Market is moderately competitive with several major players. Some of the major players are Abbott Laboratories, Drägerwerk AG & Co. KGaA, Assure Tech.(Hangzhou) Co., LTD, Atlas Medical GmbH, and Confirm BioSciences among others.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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