



DRUGS OF ABUSE
TESTING MARKETS
(SAMPLE COPY, NOT FOR RESALE)

Trends, Industry Participants, Product Overviews and Market Drivers

TABLE OF CONTENTS

1.	Overview	12	
1.1	Statement of Report	12	
1.2	About This Report	12	
1.3	Scope of the Report	13	
1.4	Objectives	13	
1.5	Methodology	14	
1.6	Executive Summary	15	
2.	Introduction to Drugs of Abuse Testing		21
2.1	Drugs of Abuse Overview	21	
2.2	Initiation of Illicit Drug Use	24	
2.3	European Levels of Drug Abuse		32
2.4	Major Drugs of Abuse		34
2.4.1	Amphetamines	34	
2.4.2	Tricyclic Antidepressants (TCAs)		35
2.4.3	Barbiturates	36	
2.4.4	Benzodiazepines	37	
2.4.5	Cannabinoids/Marijuana		40
2.4.6	Cocaine	42	
2.4.7	Lysergic Acid Diethylamide (LSD)		43
2.4.8	Methadone	45	
2.4.9	Methaqualone and Phencyclidine (PCP)		46
2.4.10	Opiates—Heroin and OxyContin		49
2.5	Alcohol Testing	51	
2.6	Test Methodologies	52	
2.7	Substance Abuse Test Types	56	
2.7.1	Urine Substance/Drug Screening		56
2.7.2	Hair Tests for Substance Abuse and Screening		57
2.7.3	Blood Tests for Substance Abuse and Screening		57
2.7.4	Saliva Tests for Substance Abuse and Screening		57
2.7.5	Sweat Tests for Substance Abuse and Screening		57
2.8	Saliva Testing	57	
2.9	Drug Panels by Toxidromes	58	
2.10	Drugs of Abuse Home Use Test	58	
2.11	Point of Care (POC) Substance Abuse Testing		60
3.	Drugs of Abuse Testing Markets		68
3.1	IVD Global Clinical Diagnostic Testing Market		68
3.1.1	Market Drivers	68	
3.1.2	Market Restraints	69	
3.2	Drugs of Abuse Testing Market Analysis		69
3.2.1	Main Players in the Industry	69	
3.2.1.1	Roche Diagnostics Market Analysis		71
3.2.1.2	Abbott Laboratories Market Analysis		73
3.2.1.3	Siemens Market Analysis	75	
3.2.1.4	Thermo Fisher Market Analysis	76	
3.2.1.5	Beckman Coulter Market Analysis		77
3.2.1.6	OraSure Market Analysis	78	
3.2.1.7	Inverness Medical Innovations (Alere) Market Analysis		80
3.3	Diagnostic Testing in the Future	83	
4.	Market Size and Analysis for Drugs of Abuse Testing		84
4.1	Global Drugs of Abuse Testing Analysis	84	
4.2	U.S. Drugs of Abuse Testing Analysis	85	
4.3	European Union Drugs of Abuse Testing Analysis		87

4.4	Rest of World Drugs of Abuse Testing Analysis	89
4.4.1	Global Drivers of Drugs of Abuse Testing	90
4.4.2	Global Outlook	91
4.4.3	U.S. Market	92
4.4.4	European Market	92
4.5	Market Drivers	93
4.6	Market Restraints	94
4.7	Market and Technology Trends	95
4.7.1	Market Trends	95
4.7.2	Technology Trends	96
4.8	Strategic Recommendations	96
5.	Specific Market Sectors for Drugs of Abuse Testing	97
5.1	Workplace Drugs of Abuse Laboratory Testing Methods	97
5.1.1	Introduction	97
5.1.2	Major U.S. Companies that Drug Test Employees	97
5.1.3	Drugs of Abuse Testing—A Recovering Market	98
5.1.4	Rising Pre-Employment Testing	98
5.1.5	A Growth in Alternative Specimen and Instant Drugs of Abuse Testing	102
5.2	Prescription Drugs of Abuse Market	104
5.2.1	Prescription Drugs and the Pain Market	108
5.2.2	Economic Burden of Prescription Opioid Misuse and Abuse	112
5.2.3	U.S. Food and Drug Administration Clampdown on Prescription Drug Misuse	114
5.2.4	Narcotic Analgesic Prescription Trends	114
5.2.5	Abuse of Non-Prescribed and Illicit Drugs—Ameritox Study 2012	115
5.3	Human Sports Drugs of Abuse Testing Markets	118
5.3.1	Introduction to the Market	118
5.3.2	Internationally Accredited Anti-Doping Laboratories	121
5.3.3	World Anti-Doping Agency Statistics	123
5.3.4	Anti-Doping International Investment Promotes Test Market	125
5.3.5	World Anti-Doping Agency Scientific Research Program	126
5.3.6	Out-of-Competition Testing Promotes Market	126
5.3.7	Use of Drugs of Abuse International Markets	126
6.	Company Specific Instrumentation and Test Kit Review	128
6.1	Biosite Diagnostics (Inverness, now called Alere)	128
6.2	Abbott Diagnostics	129
6.3	Roche Diagnostics	130
6.4	BioScan Screening Systems, Inc.	131
6.5	American Bio Medica Corp.	132
6.6	Phamatech, Inc.	135
6.7	First Check Medical Corp.	135
6.8	OraSure	136
6.9	Avitar, Inc.	136
6.10	Concateno	137
6.11	Pathtech	137
6.12	Alfa Scientific Designs, Inc.	138
6.13	TCPI, Inc.	145
6.14	Roche	145
6.15	Biophor Diagnostics	145
6.16	Alpha Scientific Designs	145
6.17	Princeton BioMeditech, Inc.	148
6.18	American BioMedica	149
6.19	Beckman Coulter	150
6.20	Bio-Rad	150
6.21	Siemens Healthcare Diagnostics	151
6.22	Thermo Fisher Scientific	152

6.23	Agilent Technologies	152	
6.24	Randox	153	
6.25	Awareness Technology		157
6.26	Carolina Chemistries	157	
6.27	Horiba Medical	157	
6.28	Ortho Clinical Diagnostics—Johnson & Johnson		157
6.29	Medica Corporation, Inc.	158	
6.30	Tecan	158	
7.	<i>In Vitro</i> Diagnostic Technologies and Potential Applications		159
7.1	Performance Characteristics Required for Implementation of FDA-Approved/Cleared Tests		159
7.2	Immunoassays	159	
7.3	Technology Principle	160	
7.4	Enzyme Immunoassays	160	
7.4.1	Enzyme-Linked Immunosorbant Assay (ELISA)	160	
7.4.2	Enzyme Multiplied Immunoassay Technique (EMIT)		161
7.4.3	Cloned Enzyme Donor Immunoassay (CEDIA)	162	
7.4.4	Radio Immunoassay (RIA)	162	
7.4.5	Fluorescence Polarization Immunoassay (FPIA)	162	
7.4.6	Lateral Flow Immunoassays (LFI)	163	
7.5	Future Trends of Immunoassays	163	
7.6	Latex Agglutination	163	
7.7	Immunoprecipitation (IP)	163	
7.8	Flow-Injection Liposome Immunoanalysis (FIILA)	164	
7.9	Clinical Immunoanalyzer Instrument Market by Sector		164
7.9.1	Market Analysis: Size, Growth, Share and Competitors		164
7.9.1.1	Large- and Mid-Volume Immunochemistry Analyzers		164
7.9.1.2	Abbott Diagnostics	164	
7.9.1.3	Siemens Medical Solutions Diagnostics	166	
7.9.1.4	Beckman Coulter, Inc.	171	
7.9.1.5	Dade Behring (Acquired by Siemens)	173	
7.9.1.6	Diagnostics Products Corporation (Acquired by Siemens Healthcare Diagnostics)		173
7.9.1.7	Olympus America, Inc. (now Beckman Coulter/Danaher)	175	
7.9.1.8	Ortho-Clinical Diagnostics	176	
7.9.1.9	Roche Diagnostics Corp.	178	
7.9.1.10	Tosoh Bioscience, Inc.	180	
7.9.1.11	Batch-Type Immunoassay Analyzers		182
7.9.1.12	Bio-Rad	182	
7.9.1.13	Diamedix Corporation	182	
7.9.1.14	Tosoh	185	
7.9.2	Small- to Mid-Volume Immunoassay Analyzers		185
7.9.2.1	Awareness Technology, Inc.	185	
7.9.2.2	Siemens Healthcare Diagnostics, Inc.	185	
7.9.2.3	Beckman Coulter, Inc.	186	
7.9.2.4	bioMérieux SA	187	
7.9.2.5	Dade Behring (Acquired by Siemens)	187	
7.9.2.6	Randox Laboratories Ltd.	191	
7.9.2.7	Tosoh Corporation	192	
7.9.3	Other Immunoassay Analyzers	193	
7.9.3.1	Inverness Medical Professional Diagnostics		193
7.9.3.2	Hycor Biomedical (A Part of Agilent Technologies)		193
7.9.3.3	Phadia AB	194	
7.9.3.4	Trinity Biotech Plc	194	
7.9.3.5	DiaSorin	194	
7.9.3.6	Grifols U.S.A., Inc.	194	
7.9.3.7	Bio-Rad Laboratories, Inc.	195	
7.9.3.8	SFRI Diagnostics	195	

7.9.3.9	Qualigen, Inc.	195	
7.9.3.10	PerkinElmer, Inc.	196	
7.9.3.11	Innotrac Diagnostics Oy	196	
7.9.3.12	Tecan Group Ltd.	196	
8.	Business Analysis of Drugs of Abuse Testing Market		198
8.1	Ultra-large Clinical Chemistry Analyzers		198
8.1.1	Beckman Coulter	198	
8.1.2	Roche Diagnostics	201	
8.1.3	Siemens Medical Solutions	202	
8.1.4	Ortho Clinical Diagnostics	207	
8.1.5	Abbott Diagnostics	208	
8.1.6	Siemens Healthcare Diagnostics	212	
8.1.7	JEOL Ltd.	216	
8.1.8	Siemens Healthcare Diagnostics	217	
8.2	Mid-Size Clinical Chemistry Analyzers		219
8.2.1	Abbott	219	
8.2.2	Beckman Coulter, Inc.	220	
8.2.3	Ortho-Clinical Diagnostics, Inc.	221	
8.2.4	Roche Diagnostics Corporation	221	
8.2.5	Randox Laboratories	222	
8.2.6	Siemens	222	
8.2.7	Nova Biomedical Corporation	225	
8.2.8	Clinical Data, Inc.	225	
8.2.9	Polymedco, Inc.	225	
8.2.10	Hitachi America Ltd.	226	
8.2.11	Shimadzu Corp.	226	
8.2.12	Thermo Fisher Scientific, Inc.	226	
8.2.13	Carolina Liquid Chemistries	227	
8.3	Small Volume Chemistry Analyzers		228
8.3.1	Clinical Data, Inc.	229	
8.3.2	Nova Biomedical Corporation	230	
8.3.3	Ortho-Clinical Diagnostics	230	
8.3.4	BPC BioSed srl	231	
8.3.5	Abbott Laboratories	231	
8.3.6	Roche Diagnostics	231	
8.3.7	Beckman Coulter	232	
8.3.8	Nova Biomedical	232	
8.3.9	Alfa Wassermann	233	
8.3.10	Hitachi	233	
8.3.11	Randox Laboratories	233	
8.3.12	Abaxis	234	
8.3.13	Siemens	234	
8.3.14	Awareness Technology	234	
8.3.15	Adaltis	235	
8.3.16	Polymedco	235	
8.3.17	Thermo Scientific	235	
8.4	Advance of Technology Trends	237	
8.4.1	Advancement of Genomics and the Pharmacogenetics of Drug Addiction		237
8.4.2	Challenges within Genetic Research of Drug Addiction	239	
8.5	Ultra-Large Clinical Chemistry Analyzer Market Analysis	242	
8.6	High Volume Clinical Chemistry Market	243	
8.7	Mid-Size Clinical Chemistry Analyzers	244	
8.8	Small-Volume Chemical Analyzer Market	245	
8.9	Competitive Analysis	246	
9.	SWOT Analysis	249	

9.1	Main Drivers of Drugs of Abuse Testing Market	249	
9.2	Potential Threats and Restraints of the Drugs of Abuse Testing Market		250
9.3	Challenges of this Market Place Going Forward	250	
9.4	Summary of Market Strengths, Weaknesses, Opportunities and Threats		252
9.5	Summary of Strengths, Weaknesses, Opportunities and Threats of Drugs of Abuse Test Market		253
10.	Reimbursement Systems	254	
10.1	Reimbursement for Laboratory Medicine	254	
10.2	Public and Private Sector Payers	254	
10.3	Components of Reimbursement Systems	256	
10.4	Medicare Coverage Decisions	256	
10.5	Medicaid Coverage Decisions	257	
10.6	Private Sector Coverage Decisions	257	
10.7	Payment Methodologies	258	
10.8	Medicare Payment Methodologies	258	
10.9	Prospective Payment Systems for Inpatient and Hospital Outpatient Care		259
10.10	Using Fee Schedules for Laboratory Tests and Services	259	
10.11	Clinical Laboratory Fee Schedule	260	
10.12	Coding System Used for Qualitative Drug Tests	260	
11.	Government Regulation	264	
11.1	U.S. Regulation	264	
11.1.1	Medical Devices as Regulated by the U.S. Food and Drug Administration		264
11.1.2	Pre-Market Approval (PMA)	264	
11.1.3	510(k) Clearance	265	
11.1.4	Importing Medical Devices into the U.S.	265	
11.1.5	Exporting Medical Devices from the U.S.	266	
11.2	U.K. Regulation	266	
11.3	E.U. Regulation	267	
11.4	French Regulation	269	
11.5	Japanese Regulation	269	
11.6	Korean Regulation	270	
11.7	Clinical Laboratory Improvement Amendments (CLIA)		270
11.8	Omnibus Transportation Employee Testing Act	271	
11.9	Employer Drug and Alcohol Compliance	272	
11.10	Regulations Governing Drug Abuse Testing	273	
11.10.1	Specimen Collection and Management	273	
11.10.2	Test Operations and Cut-off Values	274	
11.10.3	Quality Control and Quality Assurance	275	
11.10.4	Medical Review Officers and the Verification Process		276
11.10.5	Confidentiality and Release of Information	278	
11.11	The U.S. Anti-Doping Agency	279	
11.12	Drugs of Abuse Testing in the Criminal Justice System		280
12.	Company Profiles	283	
12.1	Abaxis, Inc.	283	
12.2	Abbott Laboratories	284	
12.3	Alere	288	
12.4	Alfa Scientific Designs, Inc.	289	
12.5	Analyzer Medical Systems (AMS)	289	
12.6	Awareness Technology	290	
12.7	Beckman Coulter, Inc.	290	
12.8	Binding Site	294	
12.9	bioMérieux	295	
12.10	Bio-Rad Laboratories	296	
12.11	Carolina Chemistries	297	
12.12	Dako	297	

12.13	DiaSorin	297	
12.14	Eiken Chemical Co., Ltd.		298
12.15	Fujirebio, Inc.	298	
12.16	Grifols	298	
12.17	Horiba	299	
12.18	Instrumentation Laboratory		299
12.19	Johnson & Johnson	299	
12.20	Kyowa Medex	300	
12.21	Medica Corporation, Inc.		301
12.22	Nova Biomedical Corporation		301
12.23	Orasure	301	
12.24	Ortho Clinical Diagnostics		302
12.25	Polymedco	303	
12.26	Randox	303	
12.27	Roche Diagnostics		304
12.28	Siemens AG	306	
12.29	Sysmex	307	
12.30	Thermo Fisher Scientific		308
12.31	Tosoh	310	
12.32	Trinity Biotech		310
12.33	Wako	311	
12.34	Wallac	311	

INDEX OF FIGURES

Figure 2.1: Drug Classification According to Mean Harm Rating	22
Figure 2.2: Percentage of U.S. 12th Grade Students Reporting Past Month Use of Cigarettes and Marijuana, 1975-2010	23
Figure 2.3: Percentage of U.S. 12th Grade Students Reporting Daily Marijuana Use Verses Perceived Risk of Regular Marijuana Use, 1975-2010	23
Figure 2.4: Prevalence of Drug Abuse Occurring in 12th Grade Students, 2010	24
Figure 2.5: First Specific Drug Associated with Initiation of Illicit Drug Use Among Past Year Illicit Drug Initiates Aged 12 or Older	25
Figure 2.6: Past Year Initiates of Specific Illicit Drugs Among Persons Aged 12 or Older	25
Figure 2.7: Mean Age at First Use for Specific Illicit Drugs Among Past Year Initiates Aged 12 to 49	26
Figure 2.8: Past Year Marijuana Initiates Among Persons Aged 12 or Older and Mean Age at First Use of Marijuana Among Past Year Marijuana Initiates Aged 12 to 49, 2004-2011	26
Figure 2.9: Past Year Hallucinogen Initiates Among Persons Aged 12 or Older, 2004-2011	27
Figure 2.10: Past Year Methamphetamine Initiates Among Persons Aged 12 or Older and Mean Age at First Use of Methamphetamine Among Past Year Methamphetamine Initiates Aged 12 to 49, 2004-2011	28
Figure 2.11: Substance Dependence or Abuse in the Past Year Among Persons Aged 12 or Older, 2002-2011	29
Figure 2.12: Dependence on or Abuse of Specific Illicit Drugs in the Past Year Among Persons Aged 12 or Older, 2011	29
Figure 2.13: Number of Past Month Abusers of Marijuana in the U.S., 2008-2011	30
Figure 2.14: Number of U.S. Abusers of Cocaine, 2009-2011	30
Figure 2.15: Number of U.S. Abusers of Psychotherapeutic Drugs, 2009-2011	31
Figure 2.16: Methamphetamine User Prevalence, 2008-2011	31
Figure 2.17: Number of Drug Abusers in Europe, by Drug Type	32
Figure 2.18: First Time Users of Cannabis within Europe, 2006-2011	33
Figure 2.19: Top Ten European Countries for Cocaine Abuse, 1990-2011	33
Figure 2.20: Chemical Structure of Amphetamine	34
Figure 2.21: Chemical Structure of Barbituates	36
Figure 2.22: Chemical Structure of Benzodiazepines	38
Figure 2.23: Chemical Structure of Cannabinoid/Marijuana	41
Figure 2.24: Chemical Structure of Cocaine	42

Figure 2.25: Chemical Structure of Lysergic Acid Diethylamide (LSD)	44
Figure 2.26: Chemical Structure of Methadone	46
Figure 2.27: Chemical Structure of Methaqualone	47
Figure 2.28: Chemical Structure of Phenylcyclidine	47
Figure 2.29: Chemical Structure of Heroin	49
Figure 2.30: Chemical Structure of OxyContin	50
Figure 3.1: Key Diagnostic Companies by Market Share in the DOA Market	70
Figure 3.2: Roche Diagnostics Sales Volume, 2008-2012	71
Figure 3.3: Roche Diagnostics Core Operating Profit, 2008-2012	72
Figure 3.4: Roche Diagnostics Sales by Global Region, 2012	73
Figure 3.5: Abbott Laboratories Global Annual Sales, 2007-2012	74
Figure 3.6: Abbott Laboratories Operating Cash Flow, 2007-2012	74
Figure 3.7: Abbott Laboratories Net Sales—Diagnostics Division, 2008-2012	75
Figure 3.8: Siemens Market Share by Geographic Region, 2012	76
Figure 3.9: Thermo Fisher Revenue Generated by Geographic Region, 2012	76
Figure 3.10: Beckman Coulter Revenue by Geographic Region, 2010	77
Figure 3.11: Beckman Coulter Division of Sales, 2010	78
Figure 3.12: OraSure Technologies U.S. and International Revenue, 2010-2012	79
Figure 3.13: Alere Total Revenue Generated, 2011 and 2012	81
Figure 3.14: Alere Gross Profit Generated, 2011 and 2012	81
Figure 3.15: Alere Revenue Generated by Geographic Area, U.S., Europe, 2012	82
Figure 3.16: Alere Professional Diagnostic Sales, 2011 and 2012	82
Figure 3.17: Alere Toxicology and Drugs of Abuse Testing Sales, 2011 and 2012	83
Figure 4.1: Global Revenue of Drugs of Abuse Testing Market Forecast, 2009-2017	84
Figure 4.2: Drug-Test Volume in the U.S., 2006-2016	85
Figure 4.3: U.S. Revenue of Drugs of Abuse Testing Market Forecast, 2009-2017	86
Figure 4.4: U.S. Percentage Market Share of Drugs-of-Abuse Testing Market, 2010-2017	87
Figure 4.5: E.U. Revenue of Drugs of Abuse Testing Market Forecast, 2009-2017	88
Figure 4.6: European Market Share of Drugs of Abuse Market, 2010-2017	89
Figure 4.7: Rest of World Revenue of Drugs of Abuse Testing Market Forecast, 2009-2017	89
Figure 4.8: Rest of World Market Share of Drugs of Abuse Market, 2010-2017	90
Figure 4.9: Global <i>In Vitro</i> Diagnostic Market Revenue Forecast, 2010-2016	94
Figure 4.10: Global <i>In Vitro</i> Diagnostic Market Share (Percentage) by Geography, 2012	94
Figure 5.1: Percentage of U.S. Workforce Testing Positive for Drugs of Abuse, 1988-2011	100
Figure 5.2: Total U.S. Prescription Market Revenue, 2006-2012	104
Figure 5.3: Total Spending on Prescription Narcotic Analgesics in the U.S., 2006-2011	105
Figure 5.4: Total Number of Narcotic Analgesic Prescriptions in the U.S., 2006-2011	106
Figure 5.5: Number of U.S. Prescriptions for Hydrocodone/Acetaminophen, 2006-2011	106
Figure 5.6: Number of U.S. Prescriptions for Oxycodone/Acetaminophen, 2006-2011	107
Figure 5.7: Total OxyContin Sales in the U.S., 2006-2012	107
Figure 5.8: National Institute for Health Statistics Survey Common U.S. Types of Pain	108
Figure 5.9: Total Market Share of Prescription Drugs in the Global Market	109
Figure 5.10: Projected Annual Peak Sales of Selected Pain Drugs Including Opioids	110
Figure 5.11: Comparison of Total Annual Healthcare Cost of U.S. Opioid Abuser and Demographically-Matched Comparison Non-Abuser	113
Figure 5.12: Direct All-Cause U.S. Healthcare Costs Per Person Associated with Opioid Abuse	113
Figure 5.13: Ameritox National Prescription Drug Report 2012—Percentage Positive and Negative for Prescribed, Non-Prescribed and Illicit Drugs in System	116
Figure 5.14: Ameritox National Prescription Drug Report 2012—Top Ten States Indicating Noncompliance to Medical Prescription, where Prescription Medication was not Detected	116
Figure 5.15: Ameritox National Prescription Drug Report 2012—Top Ten States Indicating Noncompliance to Medical Prescription, where Non-Prescription Medication was Detected	117
Figure 5.16: Ameritox National Prescription Drug Report 2012—Top Ten States Indicating Noncompliance to Medical Prescription, where an Illicit Drug was Detected	117
Figure 5.17: Ameritox National Prescription Drug Report 2012—Breakdown (Percentage) of Illicit Drugs Type	118

Figure 5.18: International Funds Received by UNESCO for the International Convention Against Doping in Sport Voluntary Fund	125
Figure 5.19: International Funds Granted By UNESCO for the International Convention Against Doping in Sport Voluntary Fund	126
Figure 7.1: Principles of Enzyme-Linked Immunosorbant Assay (ELISA)	161
Figure 7.2: Enzyme Multiplied Immunoassay Technique (EMIT)	162
Figure 8.1: U.S. Market Share for Ultra-Large Clinical Chemistry Analyzers	242
Figure 8.2: Non-U.S. Market Share for Ultra-Large Clinical Chemistry Analyzers	243
Figure 8.3: Global Sales of Chemical Analyzers from Roche Diagnostics, 2012	246
Figure 10.1: Fiscal Year 2010 Federal Outlays	254
Figure 10.2: Rise in the Number of Medicare Beneficiaries, 1966-2010	255
Figure 10.3: Clinical Laboratory Revenue Payment Breakdown	255
Figure 10.4: Hospital Insurance Medicare Benefit Payments, 2010	258
Figure 10.5: Supplementary Medical Insurance Medicare Benefit Payments, 2010	259
Figure 10.6: Coding Strategy for Qualitative Drug Tests, 2010	261
Figure 10.7: Coding Strategy for Qualitative Drug Tests, 2011	262
Figure 10.8: Specific Coding for Qualitative Drug Tests	263
Figure 11.1: Prevalence of U.S. Adults in Prison, Jail, or on Parole or Probation, 1980-2009	281

INDEX OF TABLES

Table 2.1: Primary Site of Action and Neurotransmitters Involved in Drugs of Abuse Mechanism of Action	21
Table 2.2: Level of Drug Abuse in Britain and Average Cost of Agent	22
Table 2.3: Short-Term Effects of Amphetamine Abuse	34
Table 2.4: Long-Term Effects of Amphetamine Abuse	35
Table 2.5: Short-Term Effects of Barbiturates	36
Table 2.6: Long-Term Effects of Barbiturates	36
Table 2.7: Barbiturates Under International Control	37
Table 2.8: Common Benzodiazepines on Prescription in the U.S.	38
Table 2.9: Sedative/Hypnotic Benzodiazepines Under International Control	39
Table 2.10: Anxiolytic Benzodiazepines Under International Control	39
Table 2.11: Short-Term Effects of Benzodiazepines	40
Table 2.12: Long-Term Effects of Benzodiazepines	40
Table 2.13: Short-Term Effects of Cannabinoid/Marijuana Use	41
Table 2.14: Long-Term Effects of Cannabinoid/Marijuana use	41
Table 2.15: Short-Term Effects of Cocaine	43
Table 2.16: Long-Term Effects of Cocaine	43
Table 2.17: Physical Short-Term Effects of LSD	44
Table 2.18: Psychedelic Short-Term Effects of LSD	45
Table 2.19: Adverse Side Effects of LSD	45
Table 2.20: Long-Term Effects of LSD	45
Table 2.21: Short-Term Effects of Methadone	46
Table 2.22: Short-Term Effects of Phencyclidine	48
Table 2.23: Adverse Effects of Phencyclidine	48
Table 2.24: Long-Term Effects of Phencyclidine	49
Table 2.25: Short-Term Effects of Heroin Use	50
Table 2.26: Long-Term Effects of Heroin Use	50
Table 2.27: Side Effects of OxyContin	51
Table 2.28: Device Specifications for POCT Breath Alcohol Analysis	52
Table 2.29: Reasons Why U.S. Employers Comply with SAMHSA Guidelines	53
Table 2.30: "SAMHSA-5"—Basic Drug Categories to be Tested	53
Table 2.31: Extended Drugs of Abuse Panel	53
Table 2.32: Accredited Laboratories for SAMHSA Drug Testing	54
Table 2.33: Comparison of Blood, Urine, Hair, Saliva and Sweat Patch Testing for SAMHSA-5 Test (Marijuana, Cocaine, Amphetamines, Opiates and PCP)	55

Table 2.34: Immunoassay and Gas Chromatography Cut-off levels for SAMHSA-5 Drugs of Abuse	55
Table 2.35: Detection Periods of SAMHSA-5 Drugs in Blood, Saliva, Sweat, Urine and Hair	56
Table 2.36: Drugs of Abuse Test—Kinetics of Positive Result and Duration of Result	59
Table 2.37: Commonly Used Product Codes for Drugs of Abuse Tests	60
Table 2.38: Drug Testing Needs Tier I for Rapid Serum POCT in the Emergency Department	66
Table 2.39: Stat Urine Testing Drug Recommendations	66
Table 3.1: Global Distribution of IVD Testing by Geographic Region, 2012-2018	68
Table 3.2: Global Clinical Diagnostics Testing Market: Market Drivers Ranked in Order of Impact	68
Table 3.3: Global Clinical Diagnostics Market: Market Restraints Ranked in Order of Impact	69
Table 3.4: Key Diagnostic Companies for Drugs of Abuse Testing	70
Table 4.1: Global Revenue from Drugs of Abuse Testing, 2007-2017	84
Table 4.2: Worldwide Distribution of Drug Abuse Testing, 2013	85
Table 4.3: U.S. Revenue from Drugs of Abuse Testing, 2007-2017	86
Table 4.4: E.U. Revenue from Drugs of Abuse Testing, 2007-2017	88
Table 4.5: Rest of World Revenue from Drugs of Abuse Testing, 2007-2017	90
Table 4.6: U.S. Clinical Laboratory Diagnostic Test Retail Value Market Segments	92
Table 4.7: Drugs of Abuse Testing Market: Market Drivers Ranked in Order of Impact	93
Table 4.8: Drugs of Abuse Testing Market: Market Restraints Ranked in Order of Impact	94
Table 5.1: Drugs of Abuse Tested for and Cut-off Values for Employees	97
Table 5.2: U.S. Workforce Testing Positive for Opiates using Oral Fluid Drug Tests, 2007-2010	99
Table 5.3: U.S. Workforce Annual Positivity Rates using Urine Drug Tests, 1988-2011	100
Table 5.4: U.S. Workforce Positivity Rates by Testing Category using Urine Drug Tests, 2006-2011	101
Table 5.5: U.S. DOA Positivity Rates by Testing Reason Using Urine Drug Tests for Federally Mandated, Safety-Sensitive Workforce, 2006-2011	101
Table 5.6: U.S. DOA Positivity Rates by Testing Reason Using Urine Drug Tests for General U.S. Workforce, 2006-2011	101
Table 5.7: Positivity Rates by Drug Category Using Urine Drug Tests for Federally Mandated, Safety-Sensitive Workforce, 2006-2011	102
Table 5.8: Positivity Rates by Drug Category Using Urine Drug Tests for General U.S. Workforce, 2006-2011	102
Table 5.9: Comparison of Saliva and Urine for Use in Drugs of Abuse Testing	102
Table 5.10: Main Devices for Saliva Collection on the Market	103
Table 5.11: Selected Mass Spectrometric Methods used to Quantify Common Drugs in Oral Fluid	103
Table 5.12: Top Ten Most-Prescribed Drugs in the U.S., 2011	104
Table 5.13: Top Ten Most-Prescribed Drugs by Sales in the U.S., 2011	105
Table 5.14: Prescription Dispensing Location by Spending in the U.S., 2006-2011	108
Table 5.15: Key Therapeutics and Manufacturers in the Narcotic Drug Pipeline, 2012	110
Table 5.16: Key Therapeutics and Manufacturers in the Non-Narcotic Pain Relief Drug Pipeline, 2012	111
Table 5.17: Key Therapeutics and Manufacturers in the Neuropathic Pain Relief Drug Pipeline, 2012	111
Table 5.18: Key Therapeutics and Manufacturers in the Anti-Migraine Drug Pipeline, 2012	111
Table 5.19: Key Therapeutics and Manufacturers in the Anti-Arthritic Pain Drug Pipeline, 2012	112
Table 5.20: Current Neuropathic Pain Therapeutics Leading the Market	112
Table 5.21: Comprehensive Steroid Panel in Drugs of Abuse Testing	119
Table 5.22: Comprehensive Diuretic Panel in Drugs of Abuse Testing	120
Table 5.23: Comprehensive Stimulant Panel in Drugs of Abuse Testing	120
Table 5.24: World Anti-Doping Agency Accredited Laboratories	121
Table 5.25: Laboratory Criteria Required for World Anti-Doping Agency Accreditation	122
Table 5.26: Relevant Provisions of International Standard for Laboratories, as Applied to the Process and Requirements for WADA Approval	123
Table 5.27: World Anti-Doping Agency Testing Statistics	124
Table 5.28: UNESCO International Convention Against Doping in Sport Voluntary Fund Guidelines	125
Table 6.1: Major Competitors in the Drugs of Abuse Oral Testing Market Segment	128
Table 6.2: Major Competitors in the Drugs of Abuse Urine Testing Market Segment	128
Table 6.3: OraSure Portfolio of Drugs of Abuse Detection Methodologies	136
Table 6.4: Avitar's Aimstep ORALINE-4 Drugs of Abuse Cut-off Levels	137
Table 6.5: Pathtech Drug and Alcohol Saliva Testing Products	138
Table 6.6: Pathtech Drug and Alcohol Surface Testing Products	138

Table 6.7: Pathtech Drug and Alcohol Proscreen Urine Drugs of Abuse Test Cups	138
Table 6.8: Alpha Scientific Designs Drugs of Abuse Testing Cut-off Level	139
Table 6.9: Regulatory Clearance of Alpha Scientific Products for Drugs of Abuse Testing	140
Table 6.10: Available 510K Cleared Analytes for the Vision Integrated Drugs of Abuse Test Cup	141
Table 6.11: Drugs of Abuse Analytes and Cut-off Level Detected by the Oral-View Saliva Multi-Drugs of Abuse	142
Table 6.12: Alfa Scientific Drugs of Abuse Single Tests, Instant-View Brand (Urine)	142
Table 6.13: Alfa Scientific Drugs of Abuse, Multidrug Panel, Saliva—Oral-View Brand Second Generation-Two Strip Design	143
Table 6.14: Alfa Technologies Drugs of Abuse Multidrug Panel Configurations—Instant-View Brand (Urine)	144
Table 6.15: Alpha Scientific Designs Drugs of Abuse Testing Cut-off Level	146
Table 6.16: Regulatory Clearance of Alpha Scientific Products for Drugs of Abuse Testing	146
Table 6.17: Available 510K Cleared Analytes for the Vision Integrated Drugs of Abuse Test Cup	147
Table 6.18: Drugs of Abuse Analytes and Cut-off Level Detected by the Oral-View Saliva Multi-Drugs of Abuse	148
Table 6.19: Drugs of Abuse Cut-off Levels for the TOX/See Test by Bio-Rad	151
Table 7.1: Performance Characteristics Required before Implementation of FDA-Approved/Cleared Tests	159
Table 7.2: Comparison of Monoclonal and Polyclonal Antibody Characteristics	160
Table 7.3: Samples and Sample Handling Features of Centaur CP	167
Table 7.4: Large- and Mid-Size Immunochemistry Analyzers	181
Table 7.5: Small- to Mid-Volume Immunoassay Analyzers	197
Table 8.1: Overview of the ADVIA 2400	203
Table 8.2: Sample Handling Capability of the ADVIA 2400	203
Table 8.3: Microvolume Technology Utilized by the ADVIA 2400	203
Table 8.4: Reaction Area of the ADVIA 2400	204
Table 8.5: Reagent Handling Capability of the ADVIA 2400	204
Table 8.6: Parameter Menu of the ADVIA 2400	204
Table 8.7: Open System Capability of the ADVIA 2400	206
Table 8.8: ISE Parameters of the ADVIA 2400	206
Table 8.9: Calibration Parameters of the ADVIA 2400	206
Table 8.10: Data Management Capability of the ADVIA 2400	206
Table 8.11: General Specifications of the ADVIA 2400	207
Table 8.12: Ultra-Large Clinical Chemistry Analyzers	208
Table 8.13: Overview of ADVIA 1650	212
Table 8.14: Sample Handling Capabilities of the ADVIA 1650	212
Table 8.15: Microvolume Technology Capability of the ADVIA 1650	212
Table 8.16: Reaction Area Associated with the ADVIA 1650	213
Table 8.17: Reagent Handling Capability of the ADVIA 1650	213
Table 8.18: Parameter Menu Associated with the ADVIA 1650	213
Table 8.19: Open System Capability of the ADVIA 1650	215
Table 8.20: ISE Parameters of the ADVIA 1650	215
Table 8.21: Calibration Capabilities of the ADVIA 1650	215
Table 8.22: Data Management Capabilities of the ADVIA 1650	215
Table 8.23: General Specifications of the ADVIA 1650	216
Table 8.24: JEOL Analyzer Comparison	217
Table 8.25: Large Clinical Chemistry Analyzers	218
Table 8.26: Mid-Size Clinical Chemistry Analyzers	227
Table 8.27: Small Clinical Laboratory Analyzers	236
Table 8.28: Heritability Estimates for Drugs of Abuse	237
Table 8.29: Genetic Associations Implicated in Drug Addiction Phenotypes	238
Table 8.30: FDA Recognized Pharmacogenomic Biomarkers in to Identify Responders and Non-Responders to Medications	239
Table 8.31: Common Pharmacotherapies for Drug Dependence and Genetic Variations Implicated in Treatment	241
Table 9.1: Potential Challenges of Drugs of Abuse Testing Market	250
Table 9.2: Timeline of Legislative Changes from the Health Care and Education Reconciliation Act,	

2010-2013	251
Table 11.1: Clinical Laboratory Improvement Amendments (CLIA) Testing Categories	271
Table 11.2: Annual Minimum Drug and Alcohol Random Testing Rates Established within DOT Agencies and the USCG, 2011	272
Table 11.3: General Responsibilities of Employers under the Department of Transportation's (DOT) rule, 49 Code of Federal Regulations Part 40	272
Table 11.4: Actions that Employers Must Take after an Employee Test Result is Verified Positive	273
Table 11.5: Drugs of Abuse Cut-off Values (Initial Test) as Specified under Article 15 of the Drug Abuse Urine Testing Act	275
Table 11.6: Drugs of Abuse Cut-off Values (Confirmatory Test) as Specified under Article 18 of the Drug Abuse Urine Testing Act	275
Table 11.7: Medical Review Officer Requirements in the Department of Transportation Drug Testing Program	276
Table 11.8: Medical Review Officer Responsibilities in Drug Testing Programs	277
Table 11.9: Medical Review Officer Requirements when Reporting a Drug Test Result	278
Table 11.10: International Olympic Committee, U.S. Olympic Committee and NCAA Banned Substances	279
Table 11.11: Conditions of Sentences by Adult Probationers by Severity of Offense	281
Table 11.12: Total Federal Drug Control Budget for Fiscal Years, 2002-2011	282
Table 11.13: Federal Drug Control Budget by Function for Fiscal Years, 2009-2011	282

SAMPLE

1. Overview

1.1 Statement of Report

This report describes the specific segment of the *in vitro* diagnostics (IVD) market known as drugs of abuse testing. This term is used to distinguish it from testing for therapeutic drugs. In the current medical diagnostics market, drugs of abuse testing offers promise for growth and innovation. The development of this sector of the diagnostics industry has been driven by:

- The use mass spec instrumentation for drug-screening confirmation.
- The development of a wide variety of mass spectrometry and other separation-based technology platforms.
- The rise of drug profiling.
- New developments in diagnosis and treatment of drug dependence.
- The need for screening both therapeutic and illicit drug content.
- Improved detection levels.
- The use of computer assisted data analysis and multiplexing.

This review analyzes the size and growth of the drugs of abuse testing market, including the factors that influence the various market segments within it, the dollar volume of sales, both in the United States and worldwide. Also examined are:

- Drug analysis technology platforms.
- Clinical applications of drugs of abuse testing.
- The market for quantitative diagnostic drug tests.
- Companies participating in this sector.
- New instrumentation.
- Trends in the industry.
- The internal structure of the drugs of abuse testing sector.

1.2 About This Report

This report includes the following features:

- It examines all of the generally-accepted clinical analytical activities in use today in the drugs of abuse testing sector. It includes the prevalent clinical measurement devices and the accompanying reagents and supplies as utilized in hospitals and large reference laboratories.
- It discusses the potential benefits of the drugs of abuse testing market for various sectors of the medical and scientific communities, and it assesses the market drivers and bottlenecks from the perspective of these communities.
- It establishes the current total market size and future growth of the drugs of abuse testing market and analyzes the current size and growth of various segments.
- It assesses various business models in drugs of abuse testing and provides strategic recommendations for near-term business opportunities.
- It examines the products offered and roles played by companies that have invested significantly in this market, and it provides current and forecasted market shares by these companies.

The main objectives of this analysis are:

- Identifying viable technology drivers through a comprehensive look at platform technologies for drugs of abuse testing, including gas chromatography-quadrupole mass spectrometry, automated laboratory chemistry instruments, and point of care systems and reagents.
- Obtaining a complete understanding of the drugs of abuse tests—*i.e.*, predictive, screening, prognostic, monitoring, pharmacogenomic and theranostic—from their basic principles to their applications.

- Discovering feasible market opportunities by identifying high-growth applications in different clinical diagnostic areas and by focusing on expanding markets, such as employee drug screening, emergency medicine, opiate testing and defense and security work.
- Focusing on global industry development through an in-depth analysis of the major world markets for drugs of abuse testing, including growth forecasts.
- How can drug testing contribute to laboratory growth plans?
- Which tests are the most likely candidates for migration to MS platforms?
- How to understand the business issues that go into justifying mass spec?

1.3 Scope of the Report

The goal of this study is to review the market for drugs of abuse testing equipment and supplies using reagents and instruments for analysis of individual components in body tissues and fluids (particularly blood and urine). Toward this goal, this review answers the following key questions:

- Which companies are utilizing cutting-edge technologies to develop, validate and market drugs of abuse tests for clinical use?
- What are the current impediments to incorporating promising drugs of abuse tests in clinical practice?
- Which new drugs of abuse tests show the most promise for approval?
- What are the economic challenges to gaining approval?
- How can regulatory oversight drive approval and adoption of new technologies?
- Which alliances show the greatest synergy in bringing drugs of abuse testing to market?
- Which shared technologies are driving the most encouraging development?

This examination surveys most of the instrument companies known to be currently marketing, manufacturing or developing instruments and reagents for the drugs of abuse testing market, in both the U.S. and the world. Each leading company is discussed in depth, with sections on its history, product line, business and marketing analysis, and a subjective commentary of the company's market position.

The U.S., Europe and Japan—the world's three largest drugs of abuse testing markets—are the focus of this report. Primary attention is paid to the hospital market segment and, separately, to the instruments, reagents and supplies marketed by the major companies in this segment. Drugs of abuse are also prominent features of parallel markets such as: workplace drug testing, prescription drug abuse, and sports medicine. Indeed, it has been reported that over █% of U.S. employers have a drug testing policy in place. Market size, growth rates and market components for instruments, reagents, controls and consumables used in this area are also analyzed.

This analysis examines the companies that are actively developing and marketing mass spectrometry clinical laboratory instrumentation, reagents and supplies for performing drugs of abuse tests. The emphasis in this report is on the clinical use of drugs of abuse tests.

The reader should consult other TriMark Publications reports at www.trimarkpublications.com for detailed discussions of important individual market segments related to the drugs of abuse testing market, such as clinical chemistry testing and high-growth diagnostic tests markets. Diagnostics drug tests marketed primarily as qualitative or quantitative reagents are generally included in this report, although there is inevitably some overlap. TriMark's *Point of Care Diagnostic Testing World Markets* report discusses near patient drug testing.

1.4 Objectives

The emphasis in this report is on the clinical use of drugs of abuse tests and their development into the instrument mixture of clinical laboratory testing space. One goal of this study is to review the market for drugs of abuse testing equipment and supplies using reagents and instruments for analysis of individual components in blood, serum or plasma. The report also defines the dollar volume of sales, both worldwide and in the U.S., and analyzes the factors that influence the size and the growth of the market segments. The subsections of the drugs of abuse testing market segment are examined in detail, including: major drugs of abuse, clinical testing markets, trends, analysis, challenges, government regulations, reimbursement and billing, and business decisions. The use of drugs of abuse

testing in commercial, hospital and specialty laboratories is examined. Additionally, the factors that influence purchases are also discussed.

The focus of this report is to:

- Assess the drugs of abuse testing market drivers and bottlenecks from the perspective of the medical and scientific communities.
- Discuss the potential benefits of the drugs of abuse testing market for various sectors of the medical and scientific community.
- Establish the current total market size and future growth of the drugs of abuse testing market and analyze the current size and growth of various segments.
- Provide current and forecasted market shares by the company.
- Provide strategic recommendations for near-term business opportunities.
- Assess current commercial uses of the drugs of abuse testing market.
- Review the drugs of abuse testing business models.

On a more technical level, we:

- Discuss the problems of using indirect methods such as immunoassays for analyzing complex biological fluids when making diagnostic decisions and their replacement with MS technology platforms.
- Review the strategies available for sample preparation.
- Contrast the optimal methods for quantification when employing LC/MS/MS techniques.
- Differentiate the strategies of toxicology analysis to best fit the clinical requirements.
- Appraise the use of mass spectrometry for applications of drugs of abuse testing.
- Evaluate the applications of new technologies to the clinical laboratory assessment of drugs of abuse.
- Review the dynamic regulatory environment (FDA) and assess how drugs of abuse testing may play a role in the clinical laboratory.

This review answers the following key questions:

- Which companies are utilizing cutting-edge technologies to develop, validate and implement drug tests for clinical use?
- What impediments still exist to incorporating promising drug tests into clinical practice?
- Which new drug of abuse test shows the most promise for approval?
- What are the economic challenges to approval?
- How can regulatory oversight drive approval and adoption of new technologies?
- Which alliances show the greatest synergy in bringing drugs of abuse tests to market?
- Which shared technologies are driving the most encouraging development?
- How are businesses entering the clinical lab testing space by leveraging drugs of abuse testing?

1.5 Methodology

The author of this report holds a Ph.D. in medicine/immunology from the Royal College Surgeons of Ireland and has completed post-doctoral studies and lecturing in Trinity College Dublin and University College Cork. She has over ten years of experience as a director in laboratory testing and instrument and reagent development technology, as well as extensive experience in senior level positions in biotech and medical service companies. The senior editor has a Ph.D. in chemistry from the University of Minnesota, with more than 30 years of experience as a clinical laboratory director, as well as editing and writing articles in science and technology. A contributor to this report is a clinical lab director certified in virtually all states in the U.S. for drug testing. He is has been laboratory director of a large institution whose lab specializes in prescription drug abuse analysis.

Company-specific information is obtained mainly from industry trade publications, academic journals, news and research articles, press releases and corporate websites, as well as annual reports for publicly-held firms. Additional sources of information include non-governmental organizations (NGOs) such as the World Health Organization

(WHO) and governmental entities such as the U.S. Department of Health and Human Services (HHS), the National Institutes of Health (NIH), the Food and Drug Administration (FDA) and the Centers for Disease Control and Prevention (CDC). Where possible and practicable, the most recent data available have been used.

Some of the statistical information was taken from Biotechnology Associates' databases and from TriMark's private data stores. The information in this study was obtained from sources that we believe to be reliable, but we do not guarantee the accuracy, adequacy or completeness of any information or omission or for the results obtained by the use of such information. Key information from the business literature was used as a basis to conduct dialogue with and obtain expert opinion from market professionals regarding commercial potential and market sizes. Senior managers from major company players were interviewed for part of the information in this report.

Primary Sources

TriMark collects information from hundreds of Database Tables and many comprehensive multi-client research projects, as well as Sector Snapshots that it publishes annually. TriMark extracts relevant data and analytics from its research as part of this data collection.

Secondary Sources

TriMark uses research publications, journals, magazines, newspapers, newsletters, industry reports, investment research reports, trade and industry association reports, government-affiliated trade releases and other published information as part of its secondary research materials. The information is then analyzed and translated by the Industry Research Group into a TriMark study. The Editorial Group reviews the complete package with product and market forecasts, critical industry trends, threats and opportunities, competitive strategies and market share determinations.

TriMark Publications Report, Research and Data Acquisition Structure

The general sequence of research and analysis activity prior to the publication of every report in TriMark Publications includes the following items:

- Completing an extensive secondary research effort on an important market sector, including gathering all relevant information from corporate reporting, publicly-available data and proprietary databases.
- Formulating a study outline with the assigned writer, including important items, as follows:
 - Market and product segment grouping, and evaluating their relative significance.
 - Key competitors' evaluations, including their relative positions in the business and other relevant facts to prioritize diligence levels and assist in designing a primary research strategy.
 - End-user research to evaluate analytical significance in market estimation.
 - Supply chain research and analysis to identify any factors affecting the market.
 - New technology platforms and cutting-edge applications.
- Identifying the key technology and market trends that drive or affect these markets.
- Assessing the regional significance for each product and market segment for proper emphasis of further regional/national primary and secondary research.
- Completing a confirmatory primary research assessment of the report's findings with the assistance of expert panel partners from the industry being analyzed.

1.6 Executive Summary

Globalization has increased both the supply and the demand for illicit drugs around the world. Drug abuse is no longer the concern of only the developed world. Countries without histories of drug use, especially developing

countries, are now reporting problems of abuse because they have become transit points for international drug trafficking. Because the problem is now worldwide, a global strategy is needed for identifying, analyzing and developing strategies to deal with drug abuse and the associated problems for health and safety.

The National Survey on Drug Use and Health has reported the following findings:

- About ██████ Americans are estimated to be current illicit drug abusers in ██████—or █% of the population.
- The most commonly abused illicit drugs were marijuana, cocaine (including crack), heroin, hallucinogens, inhalants, or prescription-type psychotherapeutics.

The average age of first time illicit drug abuse was █ years in ██████—slightly down from █ years the previous year. The National Survey on Drug Use and Health estimated that three million U.S. citizens became first time users in ██████ (█ years or older), which equates to ██████ people per day. Of these users, ██████% were less than █ years old and ██████% were female.

The first drug of abuse that the majority (█████%) of first time users sampled was marijuana. This was followed by psychotherapeutics at ██████%, inhalants at ██████% and hallucinogens at ██████%. Marijuana was the most common illicit drug used, with ██████ users—█████% of the population in ██████. Psychotherapeutic drug use in ██████ was estimated at ██████ in the U.S., or ██████% of the population.

The main five drugs of abuse that SAMHSA requires an employer to test for are:

- Cannabinoids.
- Cocaine.
- Amphetamines.
- Opiates.
- Phencyclidine.

A number of human samples can be obtained to determine illicit drug use and these include:

- Urine.
- Hair follicles.
- Oral fluid.
- Sweat.
- Blood.

DoA assays can be performed on a number of sample types other than the above, for example Randox Laboratories DoA assays can be used on the following samples:

- Post-mortem blood.
- Vitreous humor.
- Forensic specimens.
- Meconium.
- Tissue.

However, urine testing is the gold standard and federal regulated and most private sector organizations will only test urine for the presence of drugs of abuse. Urine testing is widely used as it is accurate and reliable. Saliva testing is becoming more popular and costs are similar to urine testing. Immunoassay based detection methods are initially used to determine if a sample is positive for a drug of abuse. If found positive, the result is confirmed by using gas chromatography (GC) or mass spectrometry (MS). The drugs of abuse (DOA) testing market is incorporated within the clinical diagnostic testing market. This market is forecast to be worth over \$█████ by ██████. Growth factors for the clinical diagnostic testing market include:

- Increases in consumer driven healthcare.

- An aging population with better healthcare services.
- Demand for esoteric testing.
- Demand for genetic testing.

Almost \$ [REDACTED] was generated from the DOA testing market in [REDACTED], up from \$ [REDACTED] in [REDACTED], and \$ [REDACTED] in [REDACTED]. By [REDACTED], the global drugs of abuse (DOA) testing market will be worth upwards of \$ [REDACTED] according to industry experts. Between [REDACTED] and [REDACTED], a compound annual growth rate (CAGR) of [REDACTED]% is expected.

As for the geographic distribution of DOA testing, the U.S. has the largest market share and was worth an estimated \$ [REDACTED] in [REDACTED], a growth from \$ [REDACTED] in [REDACTED]. By [REDACTED], DOA testing in the U.S. is predicted to bring in revenues of \$ [REDACTED]—with a CAGR of [REDACTED]%. The second largest market share is held by the European Union (E.U.) which was worth an estimated \$ [REDACTED] in [REDACTED]. This is predicted to grow to nearly \$ [REDACTED] by [REDACTED] with a CAGR of [REDACTED]%. With an estimated \$ [REDACTED] in revenue in [REDACTED], the Rest of the World market is the least dominant sector. However, this sector is still forecast to increase in revenue to \$ [REDACTED] in [REDACTED] with a CAGR of [REDACTED]%.

The predominant drivers for this market overall are an increasing population involved in illicit drug abuse, government crackdown on illicit and prescription drug abuse, the availability of rapid and cost effective DOA tests and a global requirement for the reduction of drug abuse in the workplace and sports. The drugs of abuse testing market is dominated by urine analysis; however, oral fluid/saliva testing is gaining ground. With respect to the urine testing segment, the main competitors are:

- Roche Diagnostics.
- Abbott Laboratories.
- Siemens.
- Thermofisher.
- Beckman Coulter.
- Randox.
- American BioMedica.
- Alpha Scientific.
- First Check Medical.
- OraSure.
- Avitar.
- Biophor.
- Princeton BioMeditech.
- Inverness Medical Innovations (BioSite).
- Bioscan Screening Systems.

The top companies in the drugs of abuse oral testing market are:

- Avitar.
- OraSure.
- Alpha Scientific.
- Bioscan Screening Systems.
- American BioMedica.

Diagnostic testing will tend to be dominated by company consolidation in the near future, with more stringent reimbursement policies and a greater emphasis on cost conscious customers. Therefore, future diagnostic test market customers will require:

- Lower costs.
- Automation.
- Service discounts.

- Volume discounts.
- Reduced inventory levels.

Specific strengths of the drugs of abuse market include high level sales in the chemical analyzer market, professional diagnostics and immunoassay demand are also key drivers of this market. The DOA testing market is also strengthened by U.S. Federal Government mandatory testing regimes. Within the private sector, hospital laboratories and clinical testing facilities also promote sales.

A key advantage of this market is the ability of drug testing companies to self-propagate the market. Such companies pre-empt SAMHSA guidelines and develop emerging drugs of abuse kits. Another key driver of the DOA testing market is the current increase in oral fluid testing, as opposed to traditional urine testing. This also has the advantage of being cost effective and samples can be obtained straight from the individual. Point of care tests are similarly driving the DOA test market.

Interestingly, the number of prescriptions for potentially addictive prescription drugs such as OxyContin has increased over the last few years and this has increased the need for workplace testing. Out-of-competition testing for performance enhancing drugs in sport is also on the increase and will lead to an increase in the market. Technology advancements such as the increase in knowledge of pharmacogenetics is also predicted to propel this industry in the near future.

The main weaknesses of the current DOA testing market include ongoing problems with reimbursement and retrenchment within the hospital field. Also, as the global economy is generally weak, this has a knock-on effect on this field. The geographic combination of product sales will be affected by fluctuating exchange rates and so weakens the market further.

The European market, although strong is significantly below that of the U.S. Therefore, there is great potential here to grow the DOA testing market further. This of course will depend on each specific countries Government regulations and also the requirement by end users. Within Emerging markets, the following points must be considered:

- Changing patterns of opiate use in Asia, particularly in China's Yunnan province.
- The recent surge of injection drug use among drug users in Pakistan.
- Substantial increases of injection drug use in African countries, particularly Egypt, Kenya, Mauritius, Nigeria, South Africa and Tanzania.
- Growing trends in production, trafficking and consumption of methamphetamine and cocaine in Mexico.
- Ecstasy use in South Africa.
- Rising drug abuse in Brazil.

The emergence of new drugs and poly drug use and the prevalence of methamphetamine and amphetamine abuse in North America are not only a cause for concern but also an opportunity to grow the DOA testing market further. Multi-drug testing opportunities are also growing in the U.S. with concurrent use of methamphetamine, MDMA, LSD, ketamine, GHB and flunitrazepam among American youths. There are also significant opportunities within the alternative specimen testing sector within DOA testing. Saliva and oral fluid tests are increasing in usage and parallel urine test sensitivities.

There are noteworthy threats to the DOA testing markets and this includes a crack-down by the U.S. government on addictive drug prescribing. OxyContin sales reduced from \$ [REDACTED] in the U.S. in [REDACTED] to \$ [REDACTED] in [REDACTED], a trend that this is set to decrease in coming years. Consequently, over the next decade the level of positive DOA test positives are predicted to reduce, and so restrict the buying power of end-testers.

Competition within the market will also intensify with respect to chemical and immunodiagnostic analyzers. As technology within these systems increases, the market will flood with hi-spec facilities which could drive sales prices down. Global economic retraction has restricted the number of new-hires to the workplace. This in turn has reduced the number of pre-employment DOA tests. Expiration of patents and intellectual property claims also threaten this market place.