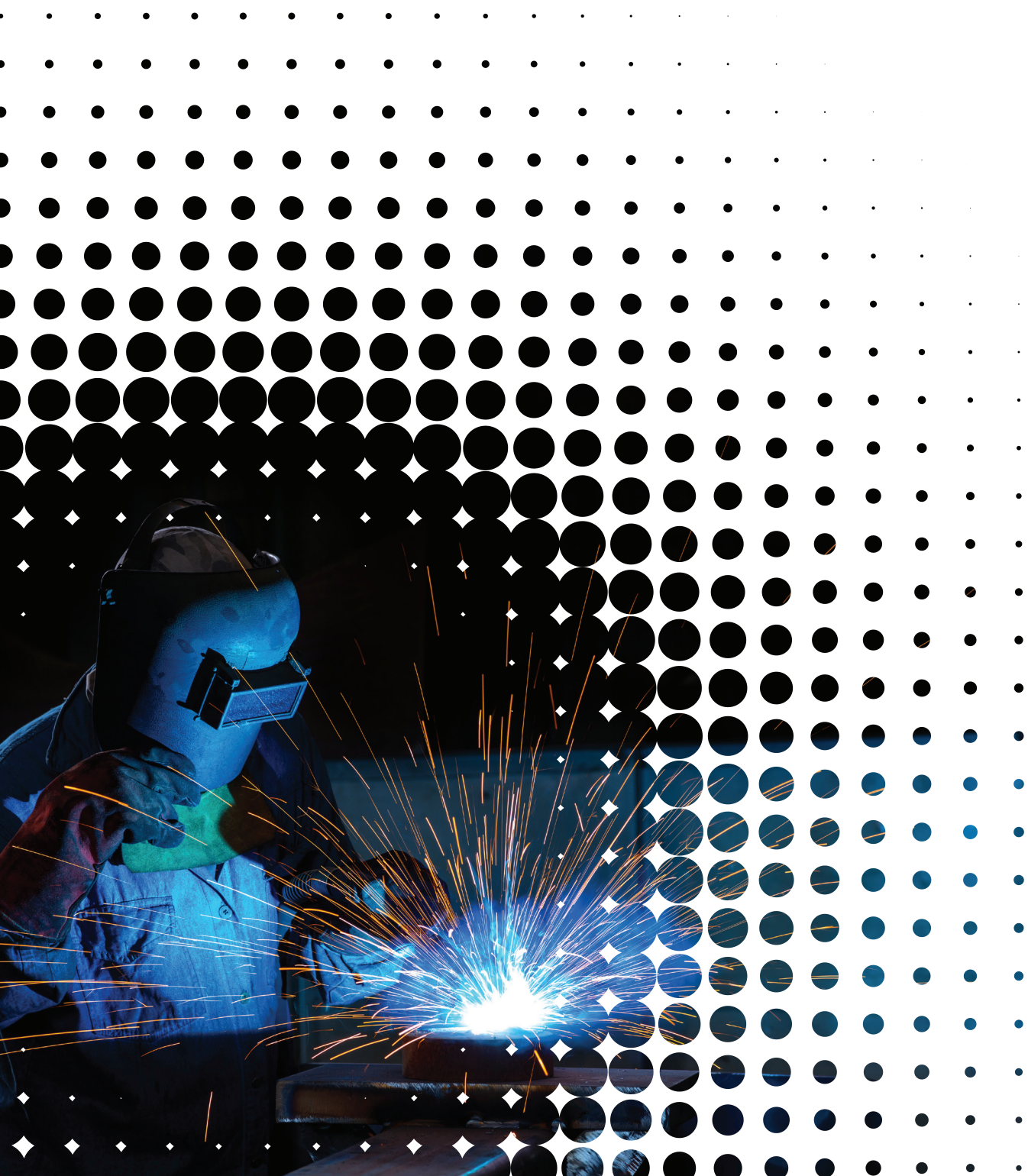


2022 Drug Testing Index® Spotlight

Manufacturing Industry



2022

Drug Testing Index® spotlight

A focused analysis of workforce drug use data and trends in your industry

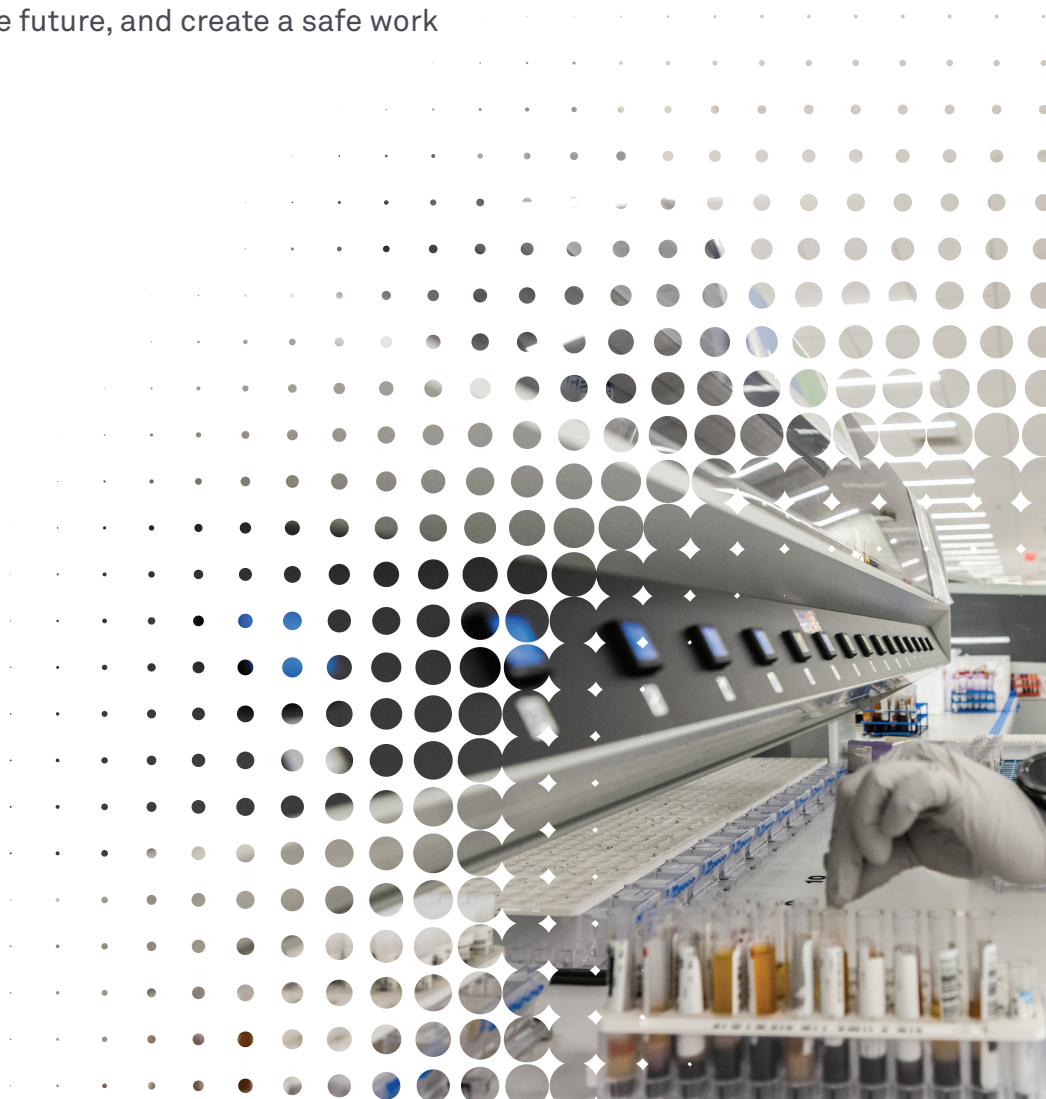
Since 1988, Quest Diagnostics® has leveraged the nationwide data from our forensic toxicology labs to publish the Drug Testing Index® (DTI), an annual report examining drug positivity rates of specimens tested on behalf of employers across the country.

The 2022 DTI compiles data from more than 11 million deidentified urine, hair, and oral fluid drug test results collected between January and December 2021. This year's report reveals relevant insights into patterns of drug use among American workers as companies grapple with an ever-evolving labor market—and an ongoing recruitment and retention crisis—in the wake of the COVID-19 pandemic.

We invite you to review both the cross-industry and industry-specific data captured in this DTI spotlight, and to use the information as you continue to reduce risk, plan for the future, and create a safe work environment for your employees.

DTI data reported in:

The Wall Street Journal
Barron's
Axios
CNBC
Fox Business
NPR Marketplace



The upshot

US workforce drug use rates reach 20-year peak

The past 5 years have seen a sharp rise in America's workforce drug use in 16 of the 17 industries tracked by Quest. 2021 continued that trend, reaching the highest rate of positive drug test results since 2001—up more than 30% in the combined US workforce from an all-time low in 2010-2012.

“Our Drug Testing Index reveals several notable trends, including increased drug positivity rates in the safety-sensitive workforce responsible for keeping society safe, as well as higher rates of positivity in individuals tested after on-the-job accidents.”

Barry Sample, PhD
Senior Science Consultant for
Quest Diagnostics

Adapting drug testing strategies to address shifting trends

As workforce drug use continues to increase, so does your risk as an employer. Consider updating your company's drug-free workplace program to meet the moment and match current drug use patterns. In addition, conducting specific post-accident drug testing can help you learn why workplace accidents happen—so you can maintain a safe environment for employees.



30%

year-over-year increase in positive drug test results

(combined US workforce since 2012)

General workforce positivity

Pre-employment ▲ 17.4%

Post-accident ▲ 26%

(vs 2017)

Safety-sensitive workforce positivity

Pre-employment ▲ 9.5%

Post-accident ▲ 41.9%

(vs 2017)

Not all drugs are used equally

Over the past 5 years, positivity rates are up for some drugs and down for others:

Marijuana ▲ 50%

Amphetamine ▲ 8.3%

Methamphetamine ▼ 11.1%

Cocaine ▼ 30%

Opiates ▼ 56.4%

(national averages across all industries vs 2017)

The aftereffect

Post-accident positivity rates steadily climb

The correlation between drug use and workplace safety is clearer than ever as positivity rates for post-accident urine tests among the general US workforce increased over the past 5 years.

A changing national environment for marijuana

In 2021, marijuana positivity rates in the general US workforce rose to 3.9%, the highest ever reported in the DTI. Considering many states have recently changed laws regarding medical marijuana, recreational marijuana, and Low THC/High CBD, it's no surprise that positivity increased across industries—highlighting the potential need for companies to reexamine how marijuana is handled in the workplace.



Urine test positivity rate after workplace accidents

- ▲ **26% for all post-accident testing from 2017 to 2021**
- ▲ **59.5% for post-accident marijuana testing from 2017 to 2021**

General workforce marijuana positivity

- ▲ **50% over the past 5 years**



2021
3.9%



2017
2.6%

Cannabis use at work

Percentage of workers who report seeing coworkers use cannabis:



32%¹
Manufacturing



45%¹
Construction



30%¹
Transportation

Manufacturing

The ripple effect of workforce shortages

Perhaps more than any other industry, manufacturing is facing post-pandemic challenges on all fronts. Rebuilding and reinforcing supply chains to fortify against future disruptions. Integrating new processes to meet rising product demand. Adopting digital technologies to drive efficiencies. Strengthening systems to fend off emerging cyberthreats.

One concern connects them all: workforce shortages.

Problems with recruitment and retention persist for many manufacturers—and until they're resolved, the challenges noted above will remain. Insufficient staffing will continue to impede efficiency and inhibit supply chain improvement, which in turn will impact corporate operating margins. And despite the increasing use of robots across the field, US manufacturers are projected to face a jobs gap of more than 2 million skilled workers by 2030.²

Growing focus on workers, growing pressure on workforce drug testing

While the workforce shortage remains a stark reality, attracting new employees is a constant battle for companies across the manufacturing industry. That hiring process is made even more difficult when workforce drug use is very high, as it is currently. A potential employee's dependability and trustworthiness naturally rise to the top of the qualifications list. That's why it's critical to deliver a drug testing experience that respects job candidates and helps to keep workplaces safe.



Key industry stats

Employees³

12,750,000

(as of April 2022)

Unemployment rate³

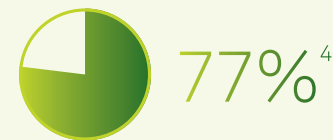
3.2%

April 2022

13.2%

April 2020

Workplace worries now and later



of manufacturers expected to have ongoing difficulty in attracting and retaining workers in 2021

2,000,000+²

projected jobs gap for skilled manufacturing workers by 2030

The power of American manufacturing

\$1 = \$2.74⁴

For every dollar spent on manufacturing jobs, \$2.74 is added to the US economy—the highest economic multiplier effect of any industry

Manufacturing

A clear need for comprehensive drug testing

Finding qualified employees has always been an arduous task. Yet labor market volatility, along with a surge in wages, has made hiring and retaining workers an increasingly complex concern for many companies. Especially as the industry shifts to new, post-pandemic models for production and the supply chain that will inevitably impact the workforce.⁵

With millions of jobs to fill, workforce drug testing can play a key role in ensuring safety and productivity at manufacturing facilities while also enhancing recruitment and retention. Consider that a potential employee's drug screening may be their first experience with your company. It's essential to make that experience simple, seamless, and superior to what they may find elsewhere. Yet a comprehensive drug testing program is often an investment many companies decide not to make.

Review the manufacturing industry's drug positivity data to the right and on the following pages to see why that investment—in time, resources, and, yes, budget—is critical.

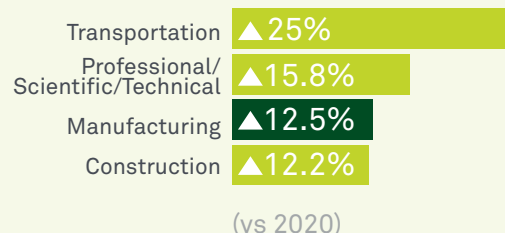
A closer look

While positivity rates for marijuana increased dramatically—most likely due to changing state laws and shifting national perceptions—jumps in positivity rates for other drugs were also seen in 2021.



2021 manufacturing industry drug use trends

Workforce positivity



Not all drugs are used equally

Compared to last year, positivity rates are up for several drugs:

Marijuana ▲ 29%
Cocaine ▲ 19%
Methamphetamine ▲ 13%

Amphetamine (no change)

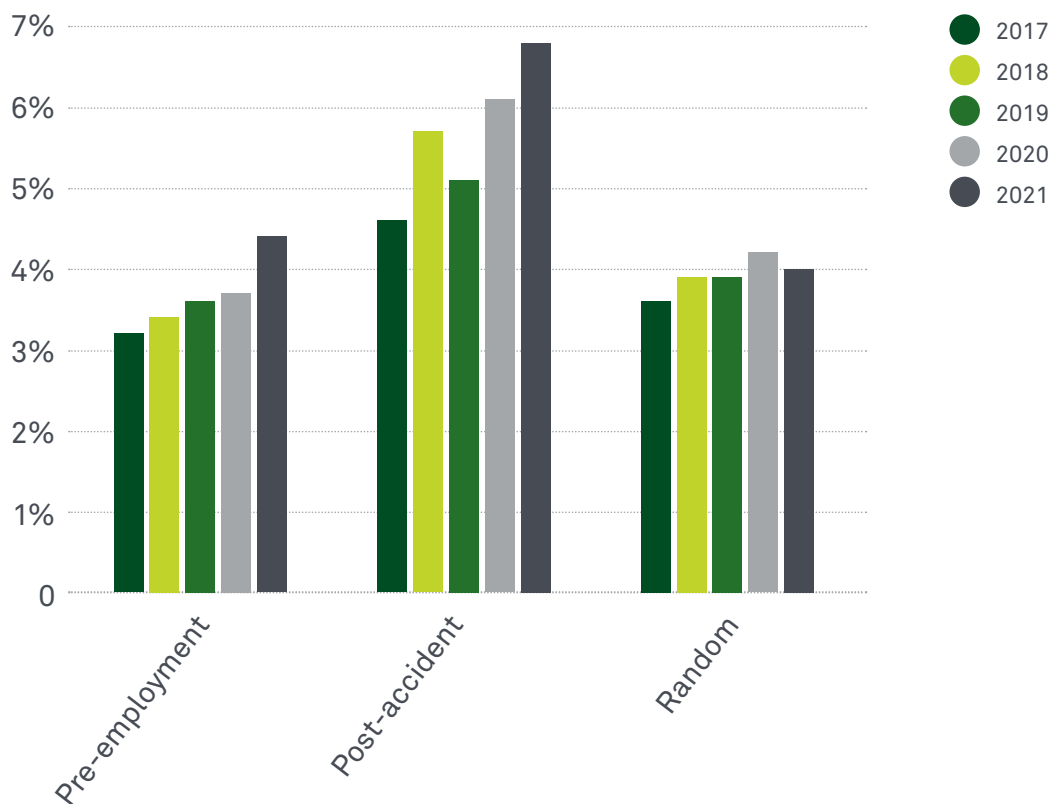
Opiates ▼ 11%
(manufacturing industry averages vs 2020)

A slippery slope

Comparing manufacturing workforce positivity from 2017 to 2021

Positivity by reason

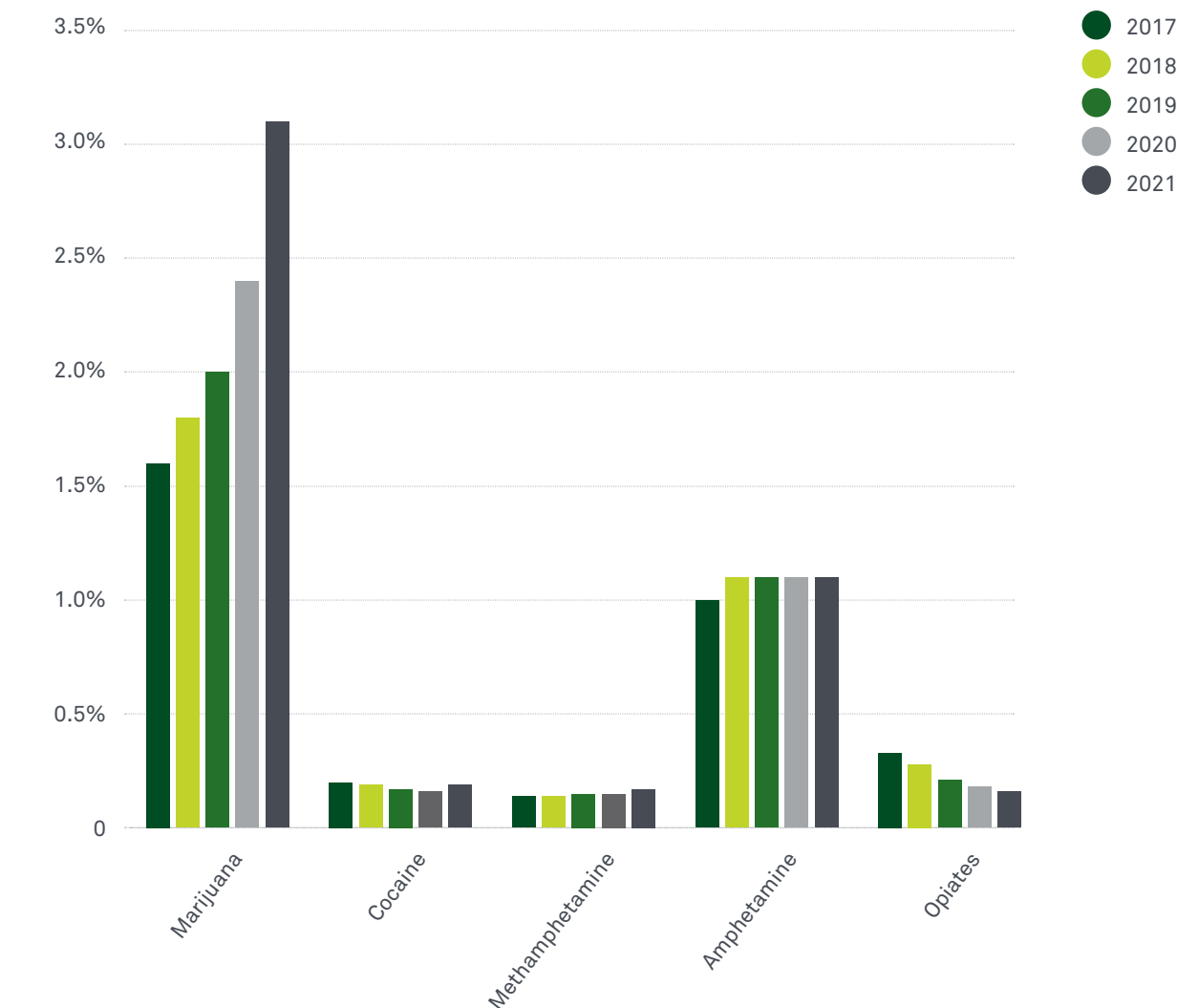
Pre-employment ▲ 37.5%
Post-accident ▲ 47.8%
(vs 2017)



	2017	2018	2019	2020	2021
Pre-employment	3.2%	3.4%	3.6%	3.7%	4.4%
Post-accident	4.6%	5.7%	5.1%	6.1%	6.8%
Random	3.6%	3.9%	3.9%	4.2%	4.0%

Comparing manufacturing workforce positivity from 2017 to 2021

Positivity by drug



	2017	2018	2019	2020	2021
Marijuana	1.6%	1.8%	2.0%	2.4%	3.1%
Cocaine	0.20%	0.19%	0.17%	0.16%	0.19%
Methamphetamine	0.14%	0.14%	0.15%	0.15%	0.17%
Amphetamine	1.0%	1.1%	1.1%	1.1%	1.1%
Opiates	0.33%	0.28%	0.21%	0.18%	0.16%



How comprehensive drug testing can help you keep up

If the 2022 DTI has taught us anything, it's that workplace drug use continues to change with the times, no matter the industry. As companies like yours face rising challenges in recruiting, retaining, and growing staff, you can't afford to compromise on workforce drug testing.

Quest Diagnostics delivers accurate, accessible drug testing solutions you can depend on—including the capacity and stringent processes many manufacturers require—to maintain safety and compliance while ensuring confidence in the results.

When you partner with Quest, we'll leverage data-driven insights and cross-industry experience to help you develop a drug testing program that protects your reputation, supports the highest standards everywhere you operate, and empowers you to build and manage a workforce that will meet the emerging demands of today and tomorrow.

Want to learn more?

Visit the Quest Manufacturing Industry Employer Hub at drugtest.questdiagnostics.com/manufacturing

Ready to meet?

Start the conversation about your drug testing needs at questdiagnostics.com/letstalkdrugtesting



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