

# **Global Latent TB Testing Market Size Study, by Test Type (Tuberculin Skin Test/TST, IGRA Test), Application (Household Contacts (HHC) of Tuberculosis (TB) Patients, People Living with HIV), End User (Diagnostic Labs, Hospitals) and Regional Forecasts 2022-2032**

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## **Abstracts**

The Global Latent TB Testing Market is valued at approximately USD 550.57 million in 2023 and is poised to grow at a healthy CAGR of 5.80% during the forecast period 2024-2032. Latent tuberculosis (TB) testing serves as a cornerstone in global public health strategies, enabling early detection of dormant infections to curb the progression of active TB. Leveraging advanced diagnostic technologies, such as the Tuberculin Skin Test (TST) and Interferon-Gamma Release Assays (IGRA), latent TB testing plays a critical role in addressing disease control challenges, especially in high-risk populations. With the increasing prevalence of TB among immunocompromised individuals and rising investments in healthcare infrastructure, the latent TB testing market is witnessing notable advancements and adoption.

The surge in demand for latent TB testing is primarily fueled by the growing global burden of tuberculosis and the critical need for early-stage detection to mitigate the spread of this infectious disease. Technological innovations in diagnostics have enhanced the sensitivity and accuracy of latent TB tests, fostering their adoption across diverse clinical settings. For instance, IGRA tests, which offer more specific results than conventional methods, are increasingly favored by healthcare providers. However, the high cost of advanced tests and limited accessibility in resource-constrained regions may impede market expansion, particularly in developing economies.

The market is diversified in its application across vulnerable groups, such as household contacts of active TB patients and people living with HIV, where latent TB infection poses significant health risks. Diagnostic labs and hospitals serve as primary end users, relying on latent TB tests to implement targeted prevention and treatment protocols. These tests not only help in identifying at-risk individuals but also contribute to reducing healthcare costs associated with managing active TB cases. The evolving emphasis on personalized healthcare and integration of AI-driven diagnostic tools further enriches the market's potential for growth.

Regionally, North America dominates the latent TB testing market, underpinned by robust healthcare systems, advanced diagnostic infrastructure, and favorable government policies supporting TB control initiatives. The United States leads the region, benefiting from extensive R&D investments and high awareness levels among healthcare providers. Europe closely follows, driven by stringent public health guidelines and increasing adoption of innovative diagnostic solutions. The Asia-Pacific region is projected to witness the fastest growth, fueled by a high TB burden, rising healthcare spending, and government-led programs to combat the disease. Emerging regions such as Latin America and the Middle East & Africa are gradually adopting latent TB testing to address endemic TB challenges and improve public health outcomes.

Major market players included in this report are:

QIAGEN

Oxford Immunotec Global PLC

Thermo Fisher Scientific Inc.

F. Hoffmann-La Roche Ltd

Abbott Laboratories

Becton, Dickinson and Company

bioMérieux SA

Hain Lifescience GmbH

Cepheid

Siemens Healthineers AG

Lonza Group

GenScript Biotech Corporation

Creative Diagnostics

Beckman Coulter, Inc.

Bio-Rad Laboratories, Inc.

The detailed segments and sub-segments of the market are explained below:

By Test Type:

Tuberculin Skin Test (TST)

IGRA Test

By Application:

Household Contacts (HHC) of Tuberculosis (TB) Patients

People Living with HIV

By End User:

Diagnostic Labs

Hospitals

By Region:

## North America

U.S.

Canada

## Europe

UK

Germany

France

Spain

Italy

Rest of Europe

## Asia-Pacific

China

India

Japan

Australia

South Korea

Rest of Asia-Pacific

## Latin America

Brazil

Mexico

Rest of Latin America

Middle East & Africa

Saudi Arabia

South Africa

Rest of Middle East & Africa

Years considered for the study are as follows:

Historical Year: 2022

Base Year: 2023

Forecast Period: 2024 to 2032

Key Takeaways:

Comprehensive market estimates and forecasts spanning 10 years.

Segmental insights highlighting test type, application, and end-user trends.

Detailed analysis of regional market dynamics and growth opportunities.

In-depth evaluation of market drivers, challenges, and emerging trends.

Competitive profiling of leading players with insights into their strategic initiatives.

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