

Global Latent Tuberculosis Infection (LTBI) Testing Market: Analysis By Type (Tuberculin Skin Test LTBI Testing and Interferon Gamma Released Assay (IGRA) LTBI Testing), By Region Size and Trends with Impact of COVID-19 and Forecast up to 2027

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Abstracts

The global latent tuberculosis infection (LTBI) testing market in 2021 was valued at US\$1.75 billion. The market value is expected to reach US\$2.47 billion by 2027. Latent Tuberculosis tests diagnose latent tuberculosis which is the type of TB infection where the bacteria remains inactive i.e., bacteria are present in the sleeping state inside the body. This infection can only be manifested through the tuberculin skin test (TST). In spite of this, there is a continuing risk that the latent infection may step up to active TB disease. The risk is increased by other illnesses such as HIV, drug abuse or medications which weakens the immune system.

The market is expected to grow at a CAGR of 5.95% during the forecast period of 2022-2027. Due to the aging population, upsurge in cigarette consumption and growth in pharmaceutical research and development, the market would propel in the forthcoming years. The global LTBI testing market volume reached 83.84 million in 2021.

Market Segmentation Analysis:

By Type: The report provides the bifurcation of the market into three segments based on the type: Tuberculin skin test LTBI testing and interferon gamma released assay (IGRA). In 2021, tuberculin skin test LTBI Testing segment held a major share of more than 60% in the market. On the other hand, the interferon gamma released assay (IGRA) segment is expected to grow at the highest CAGR in the forthcoming years

owing to the growth in pharmaceutical research and development, surging prevalence of HIV, and growing urbanization.

By Region: The report provides insight into the latent tuberculosis infection (LTBI) testing market based on the regions namely North America, Europe, Asia Pacific, Middle East & Africa and Latin America. North America held the major share of above 40% in the market, owing to the high R&D spending and increasing cigarette consumption.

In North America, the US is expected to be the fastest growing region in the forecasted period. The US continues to have one of the lowest TB case rates in the world. However, according to the Centers of Disease Control and Prevention (CDC), there is still a significant percentage of people that suffer from TB and the progress toward eliminating TB is relatively slow in the country. Whereas, in the Europe region, Germany held almost 31% share in the market owing to the rising healthcare expenditure, expanding urbanization, and advanced and hybrid technologies.

Market Dynamics:

Growth Drivers: One of the most important factors impacting the global latent tuberculosis infection (LTBI) testing market is aging population. Since aged people are highly prone to have latent TB infection as underlying illnesses, age-related diminution in immune function, increased frequency of adverse drug reactions and institutionalization can complicate the overall clinical approach to tuberculosis in elderly patients. As the aging population grows further, the risk of latent tuberculosis prevalence among them also tends to increase, which is expanding the scope for the growth of the global latent tuberculosis infection testing market in coming years. Furthermore, the market has been growing over the past few years, due to factors such as rapid urbanization, surging prevalence of HIV, accelerating TB funding, accelerating construction activities, rise in consumer spending, escalating government initiatives, and many other factors.

Challenges: However, the market has been confronted with some challenges specifically, multidrug resistant tuberculosis (MDR-TB), stringent government regulations, etc.

Trends: The market is projected to grow at a fast pace during the forecast period, due to various latest trends such as increasing healthcare expenditure in emerging markets, line probe assays (LPAs), nucleic acid amplification tests (NAATs), expansion of

advanced and hybrid technique, etc. The expansion of advanced and hybrid techniques has immensely affected the clinical use of these, resulting in the increase of application of advanced testing techniques in latent tuberculosis diagnosis. Hence, expansion of advanced and hybrid technique is predicted to create growth opportunities for the global LTBI testing market.

Impact Analysis of COVID-19 and Way Forward:

The provision of TB health services (TB diagnosis, care and prevention services), and access to these services, were severely disrupted by COVID-19. TB service providers across many high TB burden contexts have faced difficulties in service provision, due to lack of appropriate equipment and capacity, restrictions to movement (affecting health care workers, commodities and stock) and reallocation of resources.

The COVID-19 pandemic has reversed significant progress that had been made in the global fight against TB, causing many TB reduction targets to be missed. In recent, few studies have proved COVID-19 may have factored into the case of LTBI reactivation. This is consistent with the knowledge that LTBI is reactivated in the setting of immunosuppression. Given its high global prevalence and relatively high lifetime risk of reactivation, estimated to be 5%–10%, it is worth considering screening select populations for LTBI, especially in the context of the COVID-19 pandemic.

Competitive Landscape:

The global LTBI testing market is moderately fragmented, with a large number of small- and medium-sized manufacturers accounting for a major revenue share.

The key players in the global LTBI testing market are:

Roche Holding AG

Thermo Fisher Scientific Inc.

Abbott Laboratories

Sanofi S.A.

Endo International plc

Becton, Dickinson and Company

PerkinElmer, Inc.

Bio-rad Laboratories, Inc.

BioMerieux SA

Qiagen N.V.

Cyrus Poonawalla Group (Serum Institute of India Pvt. Ltd.)

Bruker Corporation

Some of the strategies among key players in the market for LTBI market are mergers, acquisitions, and collaborations. For instance, in 2022, Sanofi S.A. announced a collaboration with Innovent Biologics to bring innovative medicines to patients in China with difficult-to-treat cancers. Whereas, Becton, Dickinson & Company announced a collaboration agreement with Labcorp, a global life sciences company, creating a framework to develop, manufacture, market and commercialize flow cytometry-based companion diagnostics (CDx) intended to match patients with life-changing treatments for cancer and other diseases. ?

Contents

1. EXECUTIVE SUMMARY

2. INTRODUCTION

2.1 Latent Tuberculosis Infection Testing: An Overview

2.1.1 Definition of Latent Tuberculosis Infection Testing

2.1.2 Elements of Latent TB

2.2 LTBI Testing Segmentation: An Overview

2.2.1 LTBI Testing Segmentation

3. GLOBAL MARKET ANALYSIS

3.1 Global LTBI Testing Market: An Analysis

3.1.1 Global LTBI Testing Market: An Overview

3.1.2 Global LTBI Testing Market by Value

3.1.3 Global LTBI Testing Market by Type (Tuberculin Skin Test LTBI Testing and Interferon Gamma Released Assay (IGRA) LTBI Testing)

3.1.4 Global LTBI Testing Market by Region (North America, Europe, Asia Pacific, Latin America, and the Middle East and Africa)

3.2 Global LTBI Testing Market: Type Analysis

3.2.1 Global LTBI Testing Market by Type: An Overview

3.2.2 Global Tuberculin Skin Test LTBI Testing Market by Value

3.2.3 Global Interferon Gamma Released Assay (IGRA) LTBI Testing Market by Value

3.3 Global LTBI Testing Market Volume: An Analysis

3.3.1 Global LTBI Testing Market by Volume: An Overview

3.3.2 Global LTBI Testing Market by Volume

3.3.3 Global LTBI Testing Market Volume by Type (Tuberculin Skin Test LTBI Testing and Interferon Gamma Released Assay (IGRA) LTBI Testing)

3.3.4 Global LTBI Testing Market Volume by Region (North America, Europe, Asia Pacific, Latin America, and the Middle East and Africa)

3.4 Global LTBI Testing Market Volume: Type Analysis

3.4.1 Global LTBI Testing Market Volume by Type: An Overview

3.4.2 Global Tuberculin Skin Test LTBI Testing Market by Volume

3.4.3 Global Interferon Gamma Released Assay (IGRA) LTBI Testing Market by Volume

4. REGIONAL MARKET ANALYSIS

4.1 North America LTBI Testing Market: An Analysis

4.1.1 North America LTBI Testing Market: An Overview

4.1.2 North America LTBI Testing Market by Value

4.1.3 North America LTBI Testing Market by Region (The US, Canada, Mexico)

4.1.4 The US LTBI Testing Market by Value

4.1.5 Canada LTBI Testing Market by Value

4.1.6 Mexico LTBI Testing Market by Value

4.1.7 North America LTBI Testing Market by Volume: An Overview

4.1.8 North America LTBI Testing Market by Volume

4.1.9 North America LTBI Testing Market Volume by Region (The US, Canada, Mexico)

4.1.10 The US LTBI Testing Market by Volume

4.1.11 Canada LTBI Testing Market by Volume

4.1.12 Mexico LTBI Testing Market by Volume

4.2 Europe LTBI Testing Market: An Analysis

4.2.1 Europe LTBI Testing Market: An Overview

4.2.2 Europe LTBI Testing Market by Value

4.2.3 Europe LTBI Testing Market by Region (UK, Germany, France, Spain, and Rest of Europe)

4.2.4 Germany LTBI Testing Market by Value

4.2.5 United Kingdom LTBI Testing Market by Value

4.2.6 France LTBI Testing Market by Value

4.2.7 Italy LTBI Testing Market by Value

4.2.8 Spain LTBI Testing Market by Value

4.2.9 Rest of Europe LTBI Testing Market by Value

4.2.10 Europe LTBI Testing Market by Volume: An Overview

4.2.11 Europe LTBI Testing Market by Volume

4.2.12 Europe LTBI Testing Market Volume by Region (UK, Germany, France, Spain, and Rest of Europe)

4.2.13 Germany LTBI Testing Market by Volume

4.2.14 United Kingdom LTBI Testing Market by Volume

4.2.15 France LTBI Testing Market by Volume

4.2.16 Italy LTBI Testing Market by Volume

4.2.17 Spain LTBI Testing Market by Volume

4.2.18 Rest of Europe LTBI Testing Market by Volume

4.3 Asia Pacific LTBI Testing Market: An Analysis

4.3.1 Asia Pacific LTBI Testing Market: An Overview

4.3.2 Asia Pacific LTBI Testing Market by Value

4.3.3 Asia Pacific LTBI Testing Market by Region (China, Japan, and Rest of Asia Pacific)

4.3.4 China LTBI Testing Market by Value

4.3.5 Japan LTBI Testing Market by Value

4.3.6 Rest of Asia Pacific LTBI Testing Market by Value

4.3.7 Asia Pacific LTBI Testing Market by Volume: An Overview

4.3.8 Asia Pacific LTBI Testing Market by Volume

4.3.9 Asia Pacific LTBI Testing Market Volume by Region (China, Japan, and Rest of Asia Pacific)

4.3.10 China LTBI Testing Market by Volume

4.3.11 Japan LTBI Testing Market by Volume

4.3.12 Rest of Asia Pacific LTBI Testing Market by Volume

4.4 Middle East & Africa LTBI Testing Market: An Analysis

4.4.1 Middle East & Africa LTBI Testing Market: An Overview

4.4.2 Middle East & Africa LTBI Testing Market by Value

4.4.3 Middle East & Africa LTBI Testing Market by Volume: An Overview

4.4.4 Middle East & Africa LTBI Testing Market by Volume

4.5 Latin America LTBI Testing Market: An Analysis

4.5.1 Latin America LTBI Testing Market: An Overview

4.5.2 Latin America LTBI Testing Market by Value

4.5.3 Latin America LTBI Testing Market by Volume: An Overview

4.5.4 Latin America LTBI Testing Market by Volume

5. IMPACT OF COVID-19

5.1 Impact of COVID-19

5.1.1 Impact of COVID-19 on LTBI Testing Market

5.1.2 Impact of COVID-19 on Poverty Rate

5.1.3 Impact of COVID-19 on Geriatric Population & Latent TB Treatment

5.1.4 Post COVID-19 Impact on Global LTBI Market

6. MARKET DYNAMICS

6.1 Growth Drivers

6.1.1 Aging Population

6.1.2 Upsurge in Cigarette Consumption

6.1.3 Surging Prevalence of HIV

6.1.4 Urbanization leading to Monitoring and Screening Procedures

6.1.5 Growth in Pharmaceutical Research and Development

6.2 Challenges

- 6.2.1 Multidrug Resistant Tuberculosis (MDR-TB)
- 6.2.2 Stringent Government Regulations
- 6.2.3 Lack of Laboratory Facilities

6.3 Market Trends

- 6.3.1 Increasing Healthcare Expenditure in Emerging Markets
- 6.3.2 Accelerating TB Funding
- 6.3.3 Line Probe Assays (LPAs)
- 6.3.4 Nucleic Acid Amplification Tests (NAATs)
- 6.3.5 Expansion of Advanced and Hybrid Technique
- 6.3.6 Escalating Government Initiatives

7. COMPETITIVE LANDSCAPE

- 7.1 Global LTBI Testing Market Players by Market Capitalization
- 7.2 Global LTBI Testing Market Players by R&D Comparison

8. COMPANY PROFILES

8.1 Qiagen N.V.

- 8.1.1 Business Overview
- 8.1.2 Business Strategy

8.2 Thermo Fisher Scientific Inc.

- 8.2.1 Business Overview
- 8.2.2 Operating Segment
- 8.2.3 Business Strategy

8.3 Bio-rad Laboratories, Inc.

- 8.3.1 Business Overview
- 8.3.2 Operating Segment
- 8.3.3 Business Strategy

8.4 Abbott Laboratories

- 8.4.1 Business Overview
- 8.4.2 Operating Segment
- 8.4.3 Business Strategy

8.5 Becton, Dickinson & Company

- 8.5.1 Business Overview
- 8.5.2 Operating Segments
- 8.5.3 Business Strategy

8.6 BioMérieux SA

- 8.6.1 Business Overview
- 8.6.2 Operating Segment
- 8.6.3 Business Strategy
- 8.7 Roche Holdings AG
 - 8.7.1 Business Overview
 - 8.7.2 Operating Segment
 - 8.7.3 Business Strategy
- 8.8 PerkinElmer, Inc.
 - 8.8.1 Business Overview
 - 8.8.2 Operating Segments
 - 8.8.3 Business Strategy
- 8.9 Sanofi S.A.
 - 8.9.1 Business Overview
 - 8.9.2 Operating Segments
 - 8.9.3 Business Strategy
- 8.10 Endo International plc
 - 8.10.1 Business Overview
 - 8.10.2 Operating Segment
 - 8.10.3 Business Strategy
- 8.11 Cyrus Poonawalla Group (Serum Institute of India Pvt. Ltd.)
 - 8.11.1 Business Overview
 - 8.11.2 Business Strategy
- 8.12 Bruker Corporation
 - 8.12.1 Business Overview
 - 8.12.2 Operating Segment
 - 8.12.3 Business Strategy

List Of Figures

LIST OF FIGURES

Figure 1: Elements of Latent TB

Figure 2: LTBI Testing Segmentation

Figure 3: Global LTBI Testing Market by Value; 2017-2021 (US\$ Billion)

Figure 4: Global LTBI Testing Market by Value; 2022-2027 (US\$ Billion)

Figure 5: Global LTBI Testing Market by Type; 2021 (Percentage, %)

Figure 6: Global LTBI Testing Market by Region; 2021 (Percentage, %)

Figure 7: Global Tuberculin Skin Test LTBI Testing Market by Value; 2017-2021 (US\$ Billion)

Figure 8: Global Tuberculin Skin Test LTBI Testing Market by Value; 2022-2027 (US\$ Billion)

Figure 9: Global Interferon Gamma Released Assay (IGRA) LTBI Testing Market by Value; 2017-2021 (US\$ Million)

Figure 10: Global Interferon Gamma Released Assay (IGRA) LTBI Testing Market by Value; 2022-2027 (US\$ Million)

Figure 11: Global LTBI Testing Market by Volume; 2017-2021 (Million)

Figure 12: Global LTBI Testing Market by Volume; 2022-2027 (Million)

Figure 13: Global LTBI Testing Market Volume by Type; 2021 (Percentage, %)

Figure 14: Global LTBI Testing Market Volume by Region; 2021 (Percentage, %)

Figure 15: Global Tuberculin Skin Test LTBI Testing Market by Volume, 2017-2021 (Million)

Figure 16: Global Tuberculin Skin Test LTBI Testing Market by Volume, 2022-2027 (Million)

Figure 17: Global Interferon Gamma Released Assay (IGRA) LTBI Testing Market by Volume, 2017-2021 (Million)

Figure 18: Global Interferon Gamma Released Assay (IGRA) LTBI Testing Market by Volume, 2022-2027 (Million)

Figure 19: North America LTBI Testing Market by Value; 2017-2021 (US\$ Million)

Figure 20: North America LTBI Testing Market by Value; 2022-2027 (US\$ Million)

Figure 21: North America LTBI Testing Market by Region; 2021 (Percentage, %)

Figure 22: The US LTBI Testing Market by Value; 2017-2021 (US\$ Million)

Figure 23: The US LTBI Testing Market by Value; 2022-2027 (US\$ Million)

Figure 24: Canada LTBI Testing Market by Value; 2017-2021 (US\$ Million)

Figure 25: Canada LTBI Testing Market by Value; 2022-2027 (US\$ Million)

Figure 26: Mexico LTBI Testing Market by Value; 2017-2021 (US\$ Million)

Figure 27: Mexico LTBI Testing Market by Value; 2022-2027 (US\$ Million)

- Figure 28: North America LTBI Testing Market by Volume; 2017-2021 (Million)
- Figure 29: North America LTBI Testing Market by Volume; 2022-2027 (Million)
- Figure 30: North America LTBI Testing Market Volume by Region; 2021 (Percentage, %)
- Figure 31: The US LTBI Testing Market by Volume; 2017-2021 (Million)
- Figure 32: The US LTBI Testing Market by Volume; 2022-2027 (Million)
- Figure 33: Canada LTBI Testing Market by Volume; 2017-2021 (Million)
- Figure 34: Canada LTBI Testing Market by Volume; 2022-2027 (Million)
- Figure 35: Mexico LTBI Testing Market by Volume; 2017-2021 (Million)
- Figure 36: Mexico LTBI Testing Market by Volume; 2022-2027 (Million)
- Figure 37: Europe LTBI Testing Market by Value; 2017-2021 (US\$ Million)
- Figure 38: Europe LTBI Testing Market by Value; 2022-2027 (US\$ Million)
- Figure 39: Europe LTBI Testing Market by Region; 2021 (Percentage, %)
- Figure 40: Germany LTBI Testing Market by Value; 2017-2021 (US\$ Million)
- Figure 41: Germany LTBI Testing Market by Value; 2022-2027 (US\$ Million)
- Figure 42: United Kingdom LTBI Testing Market by Value; 2017-2021 (US\$ Million)
- Figure 43: United Kingdom LTBI Testing Market by Value; 2022-2027 (US\$ Million)
- Figure 44: France LTBI Testing Market by Value; 2017-2021 (US\$ Million)
- Figure 45: France LTBI Testing Market by Value; 2022-2027 (US\$ Million)
- Figure 46: Italy LTBI Testing Market by Value; 2017-2021 (US\$ Million)
- Figure 47: Italy LTBI Testing Market by Value; 2022-2027 (US\$ Million)
- Figure 48: Spain LTBI Testing Market by Value; 2017-2021 (US\$ Million)
- Figure 49: Spain LTBI Testing Market by Value; 2022-2027 (US\$ Million)
- Figure 50: Rest of Europe LTBI Testing Market by Value; 2017-2021 (US\$ Million)
- Figure 51: Rest of Europe LTBI Testing Market by Value; 2022-2027 (US\$ Million)
- Figure 52: Europe LTBI Testing Market by Volume; 2017-2021 (Million)
- Figure 53: Europe LTBI Testing Market by Volume; 2022-2027 (Million)
- Figure 54: Europe LTBI Testing Market Volume by Region; 2021 (Percentage, %)
- Figure 55: Germany LTBI Testing Market by Volume; 2017-2021 (Million)
- Figure 56: Germany LTBI Testing Market by Volume; 2022-2027 (Million)
- Figure 57: United Kingdom LTBI Testing Market by Volume; 2017-2021 (Million)
- Figure 58: United Kingdom LTBI Testing Market by Volume; 2022-2027 (Million)
- Figure 59: France LTBI Testing Market by Volume; 2017-2021 (Million)
- Figure 60: France LTBI Testing Market by Volume; 2022-2027 (Million)
- Figure 61: Italy LTBI Testing Market by Volume; 2017-2021 (Million)
- Figure 62: Italy LTBI Testing Market by Volume; 2022-2027 (Million)
- Figure 63: Spain LTBI Testing Market by Volume; 2017-2021 (Million)
- Figure 64: Spain LTBI Testing Market by Volume; 2022-2027 (Million)
- Figure 65: Rest of Europe LTBI Testing Market by Volume; 2017-2021 (Million)

- Figure 66: Rest of Europe LTBI Testing Market by Volume; 2022-2027 (Million)
- Figure 67: Asia Pacific LTBI Testing Market by Value; 2017-2021 (US\$ Million)
- Figure 68: Asia Pacific LTBI Testing Market by Value; 2022-2027 (US\$ Million)
- Figure 69: Asia Pacific LTBI Testing Market by Region; 2021 (Percentage, %)
- Figure 70: China LTBI Testing Market by Value, 2017-2021 (US\$ Million)
- Figure 71: China LTBI Testing Market by Value; 2022-2027 (US\$ Million)
- Figure 72: Japan LTBI Testing Market by Value; 2017-2021 (US\$ Million)
- Figure 73: Japan LTBI Testing Market by Value; 2022-2027 (US\$ Million)
- Figure 74: Rest of Asia Pacific LTBI Testing Market by Value; 2017-2021 (US\$ Million)
- Figure 75: Rest of Asia Pacific LTBI Testing Market by Value; 2022-2027 (US\$ Million)
- Figure 76: Asia Pacific LTBI Testing Market by Volume; 2017-2021 (Million)
- Figure 77: Asia Pacific LTBI Testing Market by Volume; 2022-2027 (Million)
- Figure 78: Asia Pacific LTBI Testing Market Volume by Region; 2021 (Percentage, %)
- Figure 79: China LTBI Testing Market by Volume; 2017-2021 (Million)
- Figure 80: China LTBI Testing Market by Volume; 2022-2027 (Million)
- Figure 81: Japan LTBI Testing Market by Volume; 2017-2021 (Million)
- Figure 82: Japan LTBI Testing Market by Volume; 2022-2027 (Million)
- Figure 83: Rest of Asia Pacific LTBI Testing Market by Volume; 2017-2021 (Million)
- Figure 84: Rest of Asia Pacific LTBI Testing Market by Volume; 2022-2027 (Million)
- Figure 85: Middle East & Africa LTBI Testing Market by Value; 2017-2021 (US\$ Million)
- Figure 86: Middle East & Africa LTBI Testing Market by Value; 2022-2027 (US\$ Million)
- Figure 87: Middle East & Africa LTBI Testing Market by Volume; 2017-2021 (Million)
- Figure 88: Middle East & Africa LTBI Testing Market by Volume; 2022-2027 (Million)
- Figure 89: Latin America LTBI Testing Market by Value; 2017-2021 (US\$ Million)
- Figure 90: Latin America LTBI Testing Market by Value; 2022-2027 (US\$ Million)
- Figure 91: Latin America LTBI Testing Market by Volume; 2017-2021 (Million)
- Figure 92: Latin America LTBI Testing Market by Volume; 2022-2027 (Million)
- Figure 93: Global Poverty Rate, 2014-2021 (Percentage, %)
- Figure 94: Global Aging Population – 60 and Above; 2014-2021(Billion)
- Figure 95: Global Cigarette Consumption; 2017-2021 (Billion)
- Figure 96: Global Number of People Living with HIV; 2000-2021 (Million)
- Figure 97: Global Urban Population; 2016-2021 (Billion)
- Figure 98: Global Pharmaceutical Research and Development Expenditures; 2021-2030 (US\$ Billion)
- Figure 99: Healthcare Expenditure by Region; 2019-2021(US\$ Thousand)
- Figure 100: The US Funding for Global Tuberculosis (TB); 2016-2021 (US\$ Million)
- Figure 101: Thermo Fisher Scientific Inc. Revenues by Segment; 2021 (Percentage, %)
- Figure 102: Bio-rad Laboratories, Inc. Net Sales by Segment; 2021 (Percentage, %)
- Figure 103: Abbott Laboratories Sales by Segment; 2021 (Percentage, %)

Figure 104: Becton, Dickinson & Company Revenues by Segment; 2021 (Percentage, %)

Figure 105: BioMérieux SA Sales by Segments; 2021 (Percentage, %)

Figure 106: Roche Holdings AG Revenues by Operating Segment; 2021 (Percentage, %)

Figure 107: PerkinElmer, Inc. Revenues by Operating Segments; 2021 (Percentage, %)

Figure 108: Sanofi S.A. Net Sales by Operating Segments; 2021 (Percentage, %)

Figure 109: Endo International plc Net Revenues by Segment; 2021 (Percentage, %)

Figure 110: Bruker Corporation Revenue by Segment; 2021 (Percentage, %)

Table 1: Current LPA products and Associated Equipment

Table 2: NAAT-based Technologies

Table 3: Global LTBI Testing Market Players by Market Capitalization; 2022 (US\$ Billion)

Table 4: Global LTBI Testing Market Players by R&D Comparison; 2021 (US\$ Billion)

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