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Canada Latent Tuberculosis Infection Detection Market Size, Share & Trends Analysis Report By Test Type (Tuberculin Skin Test, Interferon Gamma Release Assays), By End Use, By Province, And Segment Forecasts, 2022 - 2030

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Abstracts

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Canada Latent Tuberculosis Infection Detection Market Growth & Trends

The Canada latent tuberculosis infection detection market size is expected to reach USD 47.08 million by 2030, according to a new report by Grand View Research, Inc. The market is projected to expand at a CAGR of 6.2% from 2022 to 2030. The rising infection rate of latent TB in the indigenous population and high inbound traveling from the regions where TB is endemic are the major factors increasing the demand for latent tuberculosis infection screening. Moreover, the surge in tuberculosis testing and ongoing research activities to develop novel TB tests is another factor contributing to market expansion.

The increasing incidence of latent tuberculosis infection in the country is expected to fuel the demand for testing. Most people infected with M. tuberculosis remain asymptomatic, however, about 5% of latent TB infections develop into active cases. The goal of public health authorities to test for LTBI and to identify people at high risk of developing TB disease is increasing the demand for tuberculosis testing.

According to data published by the Canadian Medical Association, around 70% of immigrants to Canada come from Asia, Africa, and Latin American countries where TB infection is endemic. Out of these immigrants, around 50% are estimated to have latent

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tuberculosis infection. Moreover, around two-thirds of reported cases occur in foreign-born individuals in Canada.

Canada's government is taking favorable initiatives to achieve WHO's goal to eliminate the disease in the country. It has already achieved the End TB target milestone, an action plan by the WHO to eliminate the disease by 2050. Optimal management of tuberculosis and improvement in healthcare infrastructure is expected to eradicate the disease in the coming years.

Moreover, increasing recommendations for latent TB infection tests for the high-risk population in the country is expected to fuel market growth. The Canadian TB Standards recommend the use of TST and IGRA for the detection of LTBI. IGRAs are preferred to test LTBI in individuals who have taken the BCG vaccine and in groups with poor TST test results. However, TST is mainly recommended when repeated testing is planned.

The screening for LTBI of immigrants and the general population in the country is low. About 2.5% of new immigrants are flagged for surveillance after reaching the country. Medical screening programs for immigrants in Canada do not specifically include screening for LTBI and it is not mentioned in most lists of reportable diseases in the country. The inclusion of LTBI screening in surveillance programs in the country may increase the demand for latent tuberculosis tests in the coming years.

The reimbursement for tests used to detect latent tuberculosis infection is provided for people who have been identified as having contact with active cases or those at high risk of developing active TB. The reimbursement for TB testing is decentralized in the country and is provided at the province level with certain criteria. The government does not recommend latent tuberculosis infection testing and reimbursement to the general population in the country.

Most states in Canada have established three priority strategies for the prevention and management of the disease; identification of people with tuberculosis infection, investigation of contacts of infectious TB, and investigation of the population at high risk for latent TB infection. Such strategies to manage the disease in the country will increase the demand for screening tests for tuberculosis infections.

Canada Latent Tuberculosis Infection Detection Market Report Highlights

The interferon-gamma release assays segment accounted for the largest

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revenue share in 2021 owing to the increasing recommendations for IGRAs from various public health authorities

The tuberculin skin test segment dominated in terms of the number of tests performed due to its higher market penetration and cost-effectiveness of the test

The diagnostic laboratories segment held the largest revenue share in 2021 followed by the hospitals & clinics segment

The North Canadian provinces are anticipated to register a faster growth rate during the projected period. The growth of the region is governed by a high portion of the indigenous population and improvement in healthcare facilities

Key players such as QIAGEN; Oxford Immunotec USA, Inc.; Sanofi; and Abbott held a significant market share

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