

Latent TB Testing Market Size, Share and Growth Outlook 2026: By Test Method (Tuberculin Skin Test (TST), Interferon-Gamma Release Assays (IGRA)), By Sample Type, By Technology Platform, By Application, By End-User, Companies to 2034.

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Abstracts

The global Latent TB Testing Market size is forecast to increase from \$2 Billion in 2026 to \$3.16 Billion in 2034 at a CAGR of 5.87% between 2026 and 2034.

The Latent TB Testing market report provides detailed analysis and outlook of Latent TB Testing segments including By Test Method (Tuberculin Skin Test (TST), Interferon-Gamma Release Assays (IGRA)), By Sample Type (Blood, Other Samples), By Technology Platform (ELISA-Based IGRA, Chemiluminescence Immunoassay, Fluorescence Immunoassay, Lateral-Flow / Point-of-Care), By Application (Household Contacts with Pulmonary TB, People Living with HIV (PLHIV), Other Applications), By End-User (Hospitals and Clinics, Diagnostic Laboratories, Academic and Research Institutes) across global and regional markets. Further, analysis and outlook across 21 countries in North America, Europe, Asia Pacific, Middle East, Africa, and South America are provided in the study.

Latent TB Testing Industry Overview

Automated IGRA Platforms Increase Laboratory Testing Capacity

The latent TB testing industry is advancing through automation technologies that improve throughput, turnaround times, and laboratory efficiency. DiaSorin and QIAGEN received U.S. FDA approval for the LIAISON QuantiFERON-TB Gold Plus II assay, a next-generation automated Interferon Gamma Release Assay designed for latent

tuberculosis detection. The platform delivers a 25% faster turnaround time while enabling laboratories to test up to 75% more patients per hour compared with previous versions. These performance improvements address increasing demand for large-scale tuberculosis screening programs and support broader adoption of automated latent TB testing solutions across clinical laboratories.

Touchless Laboratory Workflows Reduce Manual Processing

Laboratory automation is becoming a major focus within latent tuberculosis diagnostics as healthcare systems seek greater efficiency and standardization. Inpeco, QIAGEN, and DiaSorin announced a partnership to develop a fully automated track-based workflow for QuantiFERON-TB testing. The solution combines Inpeco's FlexLab™ X automation platform with QIAGEN testing technology and DiaSorin's LIAISON analyzers to create a touchless workflow spanning sample handling, processing, and detection. The integrated system is designed to reduce manual hands-on time by up to 80%, helping laboratories improve productivity while minimizing workflow variability and operational bottlenecks.

AI-Enabled Risk Stratification Expands Diagnostic Value

The latent TB testing market is evolving beyond laboratory detection toward data-driven clinical decision support. QIAGEN announced plans to integrate artificial intelligence-based risk stratification tools into its latent tuberculosis testing ecosystem. The initiative forms part of a broader sample-to-insight strategy designed to provide laboratories with enhanced analytical capabilities for evaluating tuberculosis progression risk. By combining diagnostic testing with AI-driven interpretation tools, laboratories can generate more actionable insights while supporting public health programs, screening initiatives, and patient management strategies in regions facing increasing demand for tuberculosis surveillance and prevention.

Latent TB Testing Market Trends, Growth Drivers, Competitive Landscape, and Future Opportunities

The global Latent TB Testing market is witnessing increasing investments in innovation, product development, digital transformation, artificial intelligence integration, healthcare infrastructure expansion, and strategic partnerships across developed and emerging economies. Key Companies in the industry include- QIAGEN N.V., Revvity, Inc., bioMérieux S.A., Sanofi, Beijing Wantai Biopharmaceutical Co., Ltd., Serum Institute of India Pvt. Ltd., SD Biosensor, Inc., ARKRAY, Inc., Lionex GmbH, Boditech Med Inc..

The Latent TB Testing market is expected to remain one of the most closely watched segments in the global healthcare industry, with companies focusing on niche market segments. As healthcare systems across the US, Europe, Asia-Pacific, Latin America, and Middle East & Africa continue to prioritize efficiency, access, and innovation, the Latent TB Testing industry outlook remains shaped by rising healthcare expenditure, demographic change, digital transformation, and product innovation.

The report provides detailed market analysis including-

- Growth Latent TB Testing Market size outlook across 3 scenarios- High growth, reference, and Low growth cases

- Market Trends, Drivers, Potential Opportunities, and Challenges faced by Latent TB Testing companies

- Porter's Five forces analysis- Bargaining power of buyers and sellers, Threat of Substitutes and new entrants, and Intensity of competitive rivalry

- Detailed SWOT Analysis of global and regional Latent TB Testing markets

- Competitive analysis including business description, product analysis, and financial profiles

- Key country specific analysis detailing key factors shaping the short-term and long-term outlook

- Recent industry developments and news including mergers, acquisitions, product launches, expansions, and company announcements

Latent TB Testing Market Competitive Benchmarking and Company Analysis

Leading companies in Latent TB Testing industry include- QIAGEN N.V., Revvity, Inc., bioMérieux S.A., Sanofi, Beijing Wantai Biopharmaceutical Co., Ltd., Serum Institute of India Pvt. Ltd., SD Biosensor, Inc., ARKRAY, Inc., Lionex GmbH, Boditech Med Inc..

The Latent TB Testing market remains moderately to highly fragmented, with competition expected to intensify as companies accelerate investments in innovation, geographic expansion, strategic partnerships, and portfolio diversification through 2034. In developed markets such as the United States, Germany, France, the United

Kingdom, and Canada, competition is increasingly centered on innovation, reimbursement positioning, and value-based healthcare solutions. Meanwhile, emerging markets including China, India, Brazil, and countries across the Middle East and Africa continue to present significant opportunities for expansion due to rising healthcare expenditure, growing patient populations, and increasing access to healthcare services.

What to expect in US Latent TB Testing Markets in 2026 and beyond- Market Size, Share, Growth Rate, and Forecast to 2034

The US healthcare expenditure is forecast to reach \$8.2 Trillion in 2034 from \$5.5 Trillion in 2026 based on the National Health Expenditure Accounts (NHEA) data. With an aging population, rising chronic disease burden, and increasing migration toward minimally invasive and outpatient care, the Latent TB Testing market remains one of the strongest-performing segments in the country.

The US Latent TB Testing Companies are opting new business models, optimized pricing models, industry partnerships, and AI-enabled back end transformations to enhance efficiency and cost management. The US Latent TB Testing market faces successive waves of challenging trends, with strong opportunities across select segments. The CMS plan to implement Medicaid from 2027 is driving states to build eligibility verification systems throughout 2026. Looking ahead to 2034, we anticipate stronger results underpinned by opportunities exist across Latent TB Testing industry. On the medical device front, over 7,000 device manufacturers continue to gain from increasing demand from demand for implantable devices, surgical instruments, monitoring equipment, and diagnostic systems.

Canada- Proximity to the US and healthcare similarities to EU5 countries fuel sales of Canadian Latent TB Testing markets

Canada's strong Latent TB Testing sales performance is underpinned by an aging population and a well-developed healthcare infrastructure. Steady growth in new brand spending in rural and urban locations fuel the long-term prospects of small and medium-sized enterprises across medical, diagnostic, and therapeutic devices. The Canadian Latent TB Testing market presents significant opportunities for U.S. exporters of medical devices, with the U.S. being Canada's largest trading partner for this sector. Potential advantages including specialized materials, advanced manufacturing techniques, and digital technologies support the launch of new products in the country.

Germany Latent TB Testing Trends and Perspectives to 2034- Financial sustainability,

hospital restructuring, demographic pressures, and digitization of care delivery continue to shape the German healthcare industry.

Germany continues to remain the largest Latent TB Testing market in Europe, driven by over €600 Billion healthcare expenditure, €12 Billion medical device R&D expenditure, statutory health insurance system covering 90% German population, nationwide rollout of the electronic patient record (ePA), and large-volume of Latent TB Testing population. In particular, Research and development in Germany fuels the commercialization of cutting-edge technologies. Companies across the Germany Latent TB Testing industry value chain are focusing on both domestic markets and exports. The country is also driving digital adoption with the Hospital Future Act driving hospitals to upgrade their information systems by 2027. Over the forecast period, aging population, rising healthcare costs, and increasing procedural volumes drive the Latent TB Testing market outlook.

France Market Size, Growth Rate, and Forecast Analysis to 2034- Universal healthcare system, high public healthcare expenditure, and strong government support Latent TB Testing sales through 2034

France Latent TB Testing companies are emphasizing on opportunities for rapid, at-scale innovation to boost profitability over the long-term. The country's National Health Insurance spending target (ONDAM) estimates 3.7% growth in the country's healthcare expenditure. Over the forecast period, expenditure control measures, chronic disease management initiatives, workforce reforms, and efforts to improve system efficiency drive the long-term prospects.

The biggest 2026 policy frame is the PLFSS 2026. The law sets the Maladie branch spending target at €271.4 billion for 2026 and fixes the ONDAM at €117.5 billion for city care, €112.8 billion for health establishments, and €18.3 billion for elderly-care establishments and services. France's market is also being pulled by demographics. INSEE estimates that on 1 January 2026 France had 69.1 million inhabitants, with 22% aged 65 or over. INSEE also reported that 2025 births were 645,000 and deaths were 651,000, producing a negative natural balance of about 6,000 for the first time since the end of the Second World War.

UK Latent TB Testing Market Size, Share, and Growth Projections to 2034- Rapid growth driven by new and existing brands across the industry value chain

Small high-need consumer segments remain key priority of Latent TB Testing

distributors in the UK industry. Continuous launch of new products coupled with high expenditures support the market outlook. The UK Government financing remains the dominant funding source at 81.3% of total healthcare expenditure, or £280 billion in 2025. According to the ONS, total healthcare spending grew 7.7% nominally and 3.9% in real terms from 2024 to 2025. Similarly, out-of-pocket spending was £49 billion (14.1%) and voluntary health insurance was £9.5 billion (2.8%). The market is driven by rapid digital adoption with NHS England's plan to give more than 500,000 staff access to new AI tools.

China Latent TB Testing Market Growth Drivers, Revenue Trends, and Forecast-
Medical insurance coverage is rapidly expanding over the past few years

China Latent TB Testing market is undergoing a structural shift from hospital-centric care toward a more integrated system emphasizing primary care, outpatient services, and long-term care. Chinese local players are emerging as a strong pillar of Latent TB Testing industry, offering opportunities for both competition and partnership. Over the forecast period, new and innovative product launches remain key elements driving market outlook. China's healthcare industry is increasingly centered on expanding healthcare capacity, improving access to advanced treatments, and reducing dependence on imported technologies.

The National Healthcare Security Administration reported that by end-2024, China's basic medical insurance covered 1.32662 billion people and the coverage rate was 95%. Regional disparities in consumer spending trends continue to become more pronounced in the Chinese Latent TB Testing industry. Over the forecast period, demand will keep shifting toward geriatrics, chronic disease management, rehabilitation, long-term care, and outpatient care, while pricing pressure will remain intense in drugs and consumables because reimbursement.

India Latent TB Testing Market Landscape: Current Size and Long-Term Growth Outlook - Increased pricing pressures in US market is encouraging domestic vendors to expand across India

Indian Latent TB Testing market is witnessing the rapid emergence of an ecosystem that brings together diverse companies across the industry value chain. Further, large-scale healthcare public and private investments and a steady growth in chronic conditions is driving sales of pharmaceuticals and medical devices. Further, non-retail channel is experiencing volume decrease and patients are migrating to the retail. Indian medical device firms are also combining precision engineering with lower labor costs to

make world-class diagnostics, robotics, and critical care devices.

Brazil Latent TB Testing market remains price-driven, with products domestically manufactured and accessibility offering potential opportunities

Healthcare expenditure in Brazil exceeds 10% of GDP, with the country among the highest healthcare spenders in Latin America. ANS reported 53.2 million medical-plan beneficiaries in December 2025, while IBGE projects a steady rise in older-age cohorts, with people aged 60+ already representing about 23% of the population. The price sensitive market access is broad through the public system, private coverage adds a sizeable premium layer, and reimbursement, procurement, and hospital efficiency remain key buying drivers.

Middle East and Africa Latent TB Testing Industry Trends and Perspectives to 2034

According to the World Bank, the Middle East and North Africa population exceeds 500 million, while Sub-Saharan Africa's population exceeds 1.2 billion, making the broader MEA region one of the fastest-growing healthcare demand centers globally. The GCC countries including Saudi Arabia, United Arab Emirates, Qatar, and Kuwait continue to account for a disproportionately large share of regional healthcare spending. Government-led programs such as Saudi Arabia's Vision 2030 are accelerating investments in hospital infrastructure, private-sector participation, medical technology adoption, and healthcare digitalization. On the other hand, South Africa, Egypt, Nigeria, and Kenya remain key healthcare markets due to their large populations, expanding private healthcare sectors, and growing investments in healthcare delivery systems.

Latent TB Testing Market Segmentation

By Test Method

Tuberculin Skin Test (TST)

Interferon-Gamma Release Assays (IGRA)

By Sample Type

Blood

Other Samples

By Technology Platform

ELISA-Based IGRA

Chemiluminescence Immunoassay

Fluorescence Immunoassay

Lateral-Flow / Point-of-Care

By Application

Household Contacts with Pulmonary TB

People Living with HIV (PLHIV)

Other Applications

By End-User

Hospitals and Clinics

Diagnostic Laboratories

Academic and Research Institutes

Leading Companies in Latent TB Testing Industry (2026)

QIAGEN N.V.

Revvity, Inc.

bioMérieux S.A.

Sanofi

Beijing Wantai Biopharmaceutical Co., Ltd.

Serum Institute of India Pvt. Ltd.

SD Biosensor, Inc.

ARKRAY, Inc.

Lionex GmbH

Boditech Med Inc.

Countries Included

North America- US, Canada, Mexico

Europe- Germany, France, UK, Spain, Italy, Nordics, Others

Asia Pacific- China, India, Japan, South Korea, Australia, Southeast Asia,
Others

Latin America- Brazil, Argentina, Others

Middle East and Africa- Saudi Arabia, UAE, Other Middle East, South Africa,
Other Africa

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By Technology Platform

ELISA-Based IGRA

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Fluorescence Immunoassay

Lateral-Flow / Point-of-Care

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Sanofi
Beijing Wantai Biopharmaceutical Co., Ltd.
Serum Institute of India Pvt. Ltd.
SD Biosensor, Inc.
ARKRAY, Inc.
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Conclusion & Strategic Recommendations

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