

Latent TB Testing Market 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), Region - Global Forecast to 2029

Market Report | 2024-11-01 | 261 pages | MarketsandMarkets

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Report description:

The latent TB testing market will rise in value from estimated USD 582.5 million in 2024 to USD 773.4 million in 2029, at a CAGR of 5.8% over the forecast period. Increased funding and grants for TB control programs across the globe have emerged as an important growth factor in the latent TB testing market. Substantial funding is now being committed by governments and international bodies, including WHO and the Global Fund, to address the increasing burden of TB, especially in terms of early detection and prevention. These funds are being channeled into increasing access to diagnostic facilities, especially in high-burden regions where the healthcare infrastructure is generally weak. The availability of funds also encourages the training of healthcare professionals who work with a patient to accurately diagnose and properly manage cases of latent TB. Apart from that, research grants and international collaborations are also enabling TB testing integration into routine healthcare services. Thus, this growing funding is rendering latent TB tests available and enhancing the efforts to control TB globally. This, in turn, is fuelling the growth of the global latent TB testing market.

"Interferon gamma release assay (IGRA) segment is expected to have the fastest growth rate in the latent TB testing market, by test type, during the forecast period."

The latent TB testing market is segmented into tuberculin skin test (TST) and interferon gamma release assay (IGRA), based on test type. Interferon gamma release assay (IGRA) tests are projected to account for the highest CAGR during the forecast period. One major driving factor is its higher accuracy than conventional tuberculin skin tests (TST); IGRA tests do not suffer from interference by prior BCG vaccination, which can cause false positives for TST. Thus, IGRA is preferred in populations that have high BCG vaccination coverage. Furthermore, IGRA tends to offer faster and more consistent results, meaning that patients require fewer visits, enhancing overall efficiency in testing. Growing penetration of these tests in high-risk populations, such as patients who are immunocompromised and health care workers, continue to support increased demand. Favourable regulatory

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approvals and recommendations by various international health bodies, including the WHO, have also helped increase their adoption. Along with such factors, rising funding for research in TB and advancements in diagnostics are also driving the high growth of the IGRA test segment in the latent TB testing market.

"Household contacts with pulmonary TB segment accounted for the highest growth rate in the latent TB testing market, by application, during the forecast period."

Based on application, the latent TB testing market is bifurcated into household contacts (HHC) with pulmonary tuberculosis (TB)/household contacts (HHC) of tuberculosis (TB) patients, people living with HIV, and other applications. The household contacts with pulmonary TB application segment is expected to have the highest CAGR during the forecast period. Individuals in close contact with a TB patient have a much higher probability of becoming infected with latent TB, which is the reason why regular screenings are crucial in being able to diagnose the illness early and intervene by taking preventive measures. Increasing recognition of the critical role that latent TB testing plays among high-risk groups by healthcare providers and public health agencies also drives the need for accurate latent TB diagnostics. In addition, screening of contacts across the households by the governments and TB control programs in efforts to curb latent infections from becoming active TB is further driving growth in the market segment. Collectively, all these factors are contributing to the fast growth of this application within the latent TB testing market.

"Asia Pacific: The fastest-growing region in latent TB testing market."

The worldwide market for latent TB testing is categorized into North America, Europe, Asia Pacific, Latin America, and the Middle East & Africa. Notably, the Asia Pacific region is anticipated to experience the most substantial growth in the forecast period. The Asia Pacific region bears a high burden of tuberculosis, such as in India and China, which record a high incidence rate and thereby drive the need for essential latent TB screening and management. Growth in government and international organization funding and campaigns against TB has also led to better access to diagnostics and healthcare infrastructure in Asia Pacific. Awareness among the communities and among healthcare workers regarding the need for early detection of latent TB has also been significantly increasing the demand for further testing. Another major growth driver of this segment in the latent TB testing market is the increasing healthcare expenditure, along with supportive regulatory frameworks. All these factors propel increased growth of the latent TB testing market in the Asia Pacific region.

The break-up of the profile of primary participants in the latent TB testing market:

-□By Company Type: Tier 1 - 40%, Tier 2 - 30%, and Tier 3 - 30%

-□By Designation: C-level - 27%, D-level - 18%, and Others - 55%

-□By Region: North America - 51%, Europe - 21%, Asia Pacific - 18%, Latin America - 6%, and Middle East & Africa- 4%

The key players in this market are QIAGEN (Netherlands), Revvity (US), Beijing Wantai Biopharmaceutical Co., Ltd. (China), Sanofi (France), Endo, Inc. (US), bioMerieux (France), SD Biosensor, INC. (South Korea), Lionex GmbH (Germany), Sanofi (France), Serum Institute of India Pvt. Ltd. (India), ARKRAY, Inc. (Japan), Zhi Fei Biological (China), AID Autoimmun Diagnostika GmbH (Germany), Boditech Med Inc. (South Korea), Bioneovan Co., Ltd (China), and Biopanda Reagents Ltd (UK).

Research Coverage:

This research report categorizes the latent TB testing market by test type (tuberculin skin test (TST) and interferon gamma release assay (IGRA)), by application (household contacts with pulmonary TB, people living with HIV, and other applications), by end user (diagnostic laboratories, hospitals & clinics, academic & research institutes, and other end users), and region (North America, Europe, Asia Pacific, Latin America, and the Middle East & Africa). The scope of the report covers detailed information regarding the major factors, such as drivers, restraints, opportunities, and challenges influencing the growth of the latent TB testing market. A detailed analysis of the key industry players has been done to provide insights into their business overview, solutions, key strategies, acquisitions, and agreements. New product & service launches, and recent developments associated with the latent TB testing market. Competitive analysis of upcoming startups in the latent TB testing market ecosystem is covered in this report.

Reasons to buy this report:

The report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall latent TB testing market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The

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report also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, opportunities, and challenges.

The report provides insights on the following pointers:

- Analysis of key drivers (rising incidence of latent tuberculosis, widespread use of BCG vaccine, and increased funding and grants for TB control programs), opportunities (Growth opportunities in emerging economies), restraints (Unfavorable reimbursement scenario), and challenges (changing regulatory landscape and operational barriers and labor shortage) influencing the growth of the latent TB testing market.

- Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product launches in the latent TB testing market.

- Market Development: Comprehensive information about lucrative markets - the report analyses the latent TB testing market across varied regions.

- Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the latent TB testing market.

- Competitive Assessment: In-depth assessment of market shares, growth strategies, product offerings of leading players like QIAGEN (Netherlands), Revvity (US), Beijing Wantai Biopharmaceutical Co., Ltd. (China), Sanofi (France), and Endo, Inc. (US).

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