

# **Pancreatic and Biliary Stents Market Outlook 2026-2034: Market Share, and Growth Analysis By Product (Plastic Stents, Metal Stents), By Application (Benign Biliary Structures, Bili-Pancreatic Leakages, Pancreatic Cancer, Others), By End-User**

<https://marketpublishers.com/r/P33E7C2AAF86EN.html>

Date: November 2025

Pages: 160

Price: US\$ 3,950.00 (Single User License)

ID: P33E7C2AAF86EN

## **Abstracts**

The Pancreatic and Biliary Stents Market is valued at USD 353.99 million in 2025 and is projected to grow at a CAGR of 6.5% to reach USD 648.2 million by 2034.

### **Pancreatic and Biliary Stents Market**

The Pancreatic & Biliary Stents Market addresses endoscopic, EUS-guided, and percutaneous drainage of malignant and benign obstructions in the common bile duct and pancreatic duct, spanning plastic stents (straight, pigtail) and self-expanding metal stents (SEMS) - uncovered, partially, and fully covered - as well as lumen-apposing metal stents (LAMS) for EUS-guided gallbladder drainage and pancreatic fluid collections. Value creation hinges on patency, migration resistance, controlled radial force, anti-reflux design, and deliverability through tortuous anatomy under fluoroscopic and ultrasound guidance. Oncology (cholangiocarcinoma, pancreatic, periampullary tumors) and post-operative strictures dominate indications, while chronic pancreatitis and benign biliary strictures sustain exchange-driven volumes. Trends include thinner, more trackable delivery systems for altered anatomy, hydrophilic/low-friction coatings, anti-biofilm surfaces, and stents tuned for ERCP vs EUS roles. Hospitals and advanced ASCs weigh upfront device cost against exchange frequency, anesthesia time, readmission risk, and quality-of-life endpoints; reimbursement pathways and day-care protocols influence site-of-care shift. Competitive dynamics pit global endoscopy majors and specialized innovators against regional value players, with stickiness driven by physician preference, proctorship programs, and accessory ecosystems

(sphincterotomes, guidewires, dilation, cholangioscopy). As cancer care pathways emphasize faster biliary decompression and fewer re-interventions, procurement favors platforms with strong clinical evidence, predictable deployment, and comprehensive training and service.

## Pancreatic and Biliary Stents Market Key Insights

**Plastic vs. metal: economics, patency, and exchange strategy** Plastic stents remain favored for short-term drainage and benign disease due to lower unit cost and easy removal, but occlusion from sludge/biofilm necessitates planned exchanges. SEMS deliver higher radial force and longer patency in malignant obstruction, with covering choices balancing tissue ingrowth prevention against migration and side-branch access.

**Covered, partially covered, and anti-migration design trade-offs** Fully covered SEMS aid removability and reduce ingrowth; partially covered variants seek anchoring without overgrowth; uncovered offer maximal frictional hold but risk tissue embedding. Flared ends, anchoring fins, and braided nitinol geometries tailor fixation, while anti-reflux valves target duodenobiliary reflux that accelerates occlusion.

**EUS-guided interventions expand the addressable market** LAMS and dedicated EUS stents enable gallbladder drainage when ERCP is inaccessible, and create cystogastrostomy tracts for pancreatic fluid collections. Wider lumens improve drainage and endoscopic access for necrosectomy, but require rigorous training, cautery-enhanced delivery control, and post-deployment surveillance protocols.

**Benign strictures demand planned, protocolized therapy** Multistent plastic strategies or removable fully covered SEMS are used to remodel benign biliary and pancreatic strictures (e.g., post-surgical, chronic pancreatitis). Success depends on exchange cadence, dilation technique, and minimizing pancreatic irritation; clear pathways reduce recurrence and anesthesia exposure.

**Materials & coatings: pushing patency and visibility** Nitinol frameworks provide elastic recovery and kink resistance; PTFE/silicone coverings reduce sludge adherence; radiopaque markers and echogenic tips aid placement under dual imaging. Emerging surface treatments target biofilm control without compromising flexibility, while controlled radial force profiles protect fragile ducts.

System-level kits and accessories create stickiness Procedural reliability rests on compatible guidewires, cannulation catheters, dilation balloons, and sphincterotomes. Vendors that bundle stents with “pathway kits,” pre-shaped tips, and torque-responsive delivery gain share by shortening cannulation time and standardizing success across operator skill levels.

Cholangioscopy and imaging guide difficult anatomy Direct visualization supports stone management, biopsy, and stricture characterization, informing stent choice and length. Integration with digital scopes and AI-assisted lesion assessment is growing, but requires robust sterilization, workflow alignment, and capital justification for high-mix centers.

Complication mitigation is a procurement criterion Pancreatitis, cholangitis, perforation, and bleeding risks are mitigated through atraumatic tips, smooth transitions, and reliable recapture. Hospitals scrutinize migration rates, occlusion curves, and ease of revision; post-market surveillance and registries strengthen trust during value-analysis reviews.

Reimbursement and site-of-care shifts influence portfolios Day-care ERCP and ASC expansion prioritize predictable deployment, low fluoroscopy times, and minimal re-interventions. DRG/OPPS dynamics drive preference for devices that extend exchange intervals and reduce readmissions, while standardized UDI and consignment models simplify inventory control.

Regulatory and quality systems shape vendor selection MDR and FDA expectations around biocompatibility, shelf-life, and PMS place a premium on robust clinical files and change control. Consistent IFU clarity, MRI labeling, and traceability - plus proctoring and credentialing support - are decisive for formulary access and multi-hospital wins.

## Pancreatic and Biliary Stents Market Regional Analysis

### North America

High ERCP/EUS adoption and ASC growth favor easy-to-deploy SEMS and LAMS with reliable anti-migration features. Value analysis teams prioritize clinical evidence for reduced exchanges and complications. Integrated vendor training, on-call proctorship,

and strong post-market data are key to system-wide standardization.

## Europe

Stringent MDR documentation and multidisciplinary tumor boards drive evidence-led selection. Preference leans toward covered/removable options for benign disease and long-patency SEMS for malignancy, with growing EUS use in centers of excellence. Hospitals value comprehensive accessory ecosystems, clear IFUs, and sustainability initiatives in reprocessing and packaging.

## Asia-Pacific

Large patient volumes and expanding endoscopy infrastructure accelerate uptake of cost-effective plastic stents and selected SEMS, with rapid growth in EUS-guided therapies at tertiary centers. Training partnerships and local service footprints are critical; vendors win with broad size ranges, trackable delivery systems, and multilingual support.

## Middle East & Africa

Referral centers expand ERCP programs, with gradual introduction of EUS-guided drainage in major hubs. Procurement emphasizes durable SEMS for malignant obstruction and dependable plastic options for benign cases. Reliable supply, physician training, and responsive technical support underpin vendor selection.

## South & Central America

Public–private mixes and budget variability shape a two-tier market: plastic stents for accessibility and SEMS where long patency lowers total care cost. Skilled centers adopt EUS-guided LAMS for complex cases. Partners offering consignment, training, and streamlined logistics build durable relationships across hospital networks.

## Pancreatic and Biliary Stents Market Segmentation

### By Product

Plastic Stents

Metal Stents

## By Application

Benign Biliary Structures

Bili-Pancreatic Leakages

Pancreatic Cancer

Others

## By End-User

Hospitals

Ambulatory Surgical Centers

Others

## Key Market players

Boston Scientific, Cook Medical, Olympus Corporation, Taewoong Medical, M.I.Tech (HANAROSTENT), Micro-Tech (Nanjing) Co., Ltd., W. L. Gore & Associates, Merit Medical Systems (Merit Endotek), CONMED Corporation, Medi-Globe Group (ENDO-FLEX), ELLA-CS, S&G Biotech (BONASTENT), Zeon Medical, Balton, Becton, Dickinson and Company (C. R. Bard)

## Pancreatic and Biliary Stents Market Analytics

The report employs rigorous tools, including Porter's Five Forces, value chain mapping, and scenario-based modelling, to assess supply–demand dynamics. Cross-sector influences from parent, derived, and substitute markets are evaluated to identify risks and opportunities. Trade and pricing analytics provide an up-to-date view of international flows, including leading exporters, importers, and regional price trends. Macroeconomic indicators, policy frameworks such as carbon pricing and energy security strategies, and evolving consumer behaviour are considered in forecasting

scenarios. Recent deal flows, partnerships, and technology innovations are incorporated to assess their impact on future market performance.

## Pancreatic and Biliary Stents Market Competitive Intelligence

The competitive landscape is mapped through OG Analysis' proprietary frameworks, profiling leading companies with details on business models, product portfolios, financial performance, and strategic initiatives. Key developments such as mergers & acquisitions, technology collaborations, investment inflows, and regional expansions are analyzed for their competitive impact. The report also identifies emerging players and innovative startups contributing to market disruption. Regional insights highlight the most promising investment destinations, regulatory landscapes, and evolving partnerships across energy and industrial corridors.

## Countries Covered

North America — Pancreatic and Biliary Stents market data and outlook to 2034

United States

Canada

Mexico

Europe — Pancreatic and Biliary Stents market data and outlook to 2034

Germany

United Kingdom

France

Italy

Spain

BeNeLux

Russia

Sweden

Asia-Pacific — Pancreatic and Biliary Stents market data and outlook to 2034

China

Japan

India

South Korea

Australia

Indonesia

Malaysia

Vietnam

Middle East and Africa — Pancreatic and Biliary Stents market data and outlook to 2034

Saudi Arabia

South Africa

Iran

UAE

Egypt

South and Central America — Pancreatic and Biliary Stents market data and outlook to 2034

Brazil

Argentina

Chile

Peru

\* We can include data and analysis of additional countries on demand.

### Research Methodology

This study combines primary inputs from industry experts across the Pancreatic and Biliary Stents value chain with secondary data from associations, government publications, trade databases, and company disclosures. Proprietary modeling techniques, including data triangulation, statistical correlation, and scenario planning, are applied to deliver reliable market sizing and forecasting.

### Key Questions Addressed

What is the current and forecast market size of the Pancreatic and Biliary Stents industry at global, regional, and country levels?

Which types, applications, and technologies present the highest growth potential?

How are supply chains adapting to geopolitical and economic shocks?

What role do policy frameworks, trade flows, and sustainability targets play in shaping demand?

Who are the leading players, and how are their strategies evolving in the face of global uncertainty?

Which regional “hotspots” and customer segments will outpace the market, and what go-to-market and partnership models best support entry and expansion?

Where are the most investable opportunities—across technology roadmaps, sustainability-linked innovation, and M&A—and what is the best segment to invest over the next 3–5 years?

## Your Key Takeaways from the Pancreatic and Biliary Stents Market Report

Global Pancreatic and Biliary Stents market size and growth projections (CAGR), 2024-2034

Impact of Russia-Ukraine, Israel-Palestine, and Hamas conflicts on Pancreatic and Biliary Stents trade, costs, and supply chains

Pancreatic and Biliary Stents market size, share, and outlook across 5 regions and 27 countries, 2023-2034

Pancreatic and Biliary Stents market size, CAGR, and market share of key products, applications, and end-user verticals, 2023-2034

Short- and long-term Pancreatic and Biliary Stents market trends, drivers, restraints, and opportunities

Porter's Five Forces analysis, technological developments, and Pancreatic and Biliary Stents supply chain analysis

Pancreatic and Biliary Stents trade analysis, Pancreatic and Biliary Stents market price analysis, and Pancreatic and Biliary Stents supply/demand dynamics

Profiles of 5 leading companies—overview, key strategies, financials, and products

Latest Pancreatic and Biliary Stents market news and developments

### Additional Support

With the purchase of this report, you will receive

An updated PDF report and an MS Excel data workbook containing all market tables and figures for easy analysis.

7-day post-sale analyst support for clarifications and in-scope supplementary data, ensuring the deliverable aligns precisely with your requirements.

Complimentary report update to incorporate the latest available data and the impact of recent market developments.

\* The updated report will be delivered within 3 working days

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