Locally Advanced Pancreatic Cancer Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Therapy (Chemotherapy, Immunotherapy, Targeted Therapy, Radiation Therapy, Surgery), By Route of administration (Oral, Injectables, Others), By End-User (Hospitals & Clinics, Ambulatory Care Centers, Others) By Region & Competition, 2021-2031F

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Abstracts

The Global Locally Advanced Pancreatic Cancer Market is projected to expand from USD 938.73 Million in 2025 to USD 1680.33 Million by 2031, registering a compound annual growth rate of 10.19%. Locally Advanced Pancreatic Cancer (LAPC) is defined as a malignancy stage where the tumor remains confined to the pancreas and immediate structures but encases major blood vessels, rendering it surgically unresectable without prior downstaging. The market is chiefly sustained by the growing global geriatric population and advancements in high-resolution diagnostic imaging, which facilitate earlier and more accurate detection of vascular involvement. Additionally, the rising clinical implementation of neoadjuvant chemotherapy protocols aimed at transforming unresectable tumors into surgical candidates acts as a primary catalyst for market growth, separate from broader technological developments.

Despite these advancements, the sector encounters significant hurdles due to late-stage diagnoses and the aggressive biological nature of the disease, which severely restricts the therapeutic window for effective intervention. This persistent clinical challenge is supported by recent statistics; the American Cancer Society projects that approximately 67,440 individuals in the United States will be diagnosed with pancreatic

cancer in 2025. Such elevated incidence rates, combined with rapid disease progression, create substantial obstacles to maintaining long-term treatment regimens and achieving sustained market expansion.

Market Driver

Increasing investments in oncology research and development are fundamentally transforming the therapeutic landscape for locally advanced pancreatic cancer by driving the discovery of novel therapeutic targets. Private and philanthropic entities are aggressively funding initiatives to address historical challenges related to the disease's dense stroma and drug resistance, enabling high-risk, high-reward studies that traditional funding might bypass. For example, the Lustgarten Foundation announced in August 2024 that it awarded $10.7 million in new grants specifically to accelerate projects focused on early detection and new drug development, a financial commitment essential for advancing experimental compounds into viable clinical options.

Concurrently, supportive regulatory frameworks and Orphan Drug Designations provide critical commercial incentives for pharmaceutical companies to focus on this high-mortality indication. These designations expedite the clinical development of promising agents intended for aggressive malignancies with few options, effectively lowering market entry barriers. A notable example occurred in October 2024, when the FDA granted orphan status to the novel RAS-targeting agent IMM-1-104 following data showing a 40% overall response rate; such incentives are vital given the immense disease burden, with Digestive Cancers Europe estimating in 2024 that 564,930 individuals globally will be diagnosed with pancreatic cancer by 2025.

Market Challenge

The aggressive biological nature of locally advanced pancreatic cancer, combined with frequent late-stage diagnosis, presents a major obstacle that directly impedes market growth. Because the malignancy often develops without specific symptoms, patients frequently present with extensive vascular encasement that precludes immediate surgical options and severely limits the therapeutic window. This constraint shortens the duration for administering pharmaceutical interventions, thereby reducing the total volume of therapeutics used per patient; furthermore, the rapid progression of the disease means that even when identified, the opportunity for sustained neoadjuvant treatment is often curtailed by clinical deterioration, restricting revenue generation from long-term care cycles.

This limitation is further underscored by mortality statistics that highlight the difficulty in establishing a stable patient base. According to the American Cancer Society, an estimated 51,750 deaths were attributed to pancreatic cancer in the United States in 2024. Such high attrition rates prevent the accumulation of a prevalent population necessary to drive significant market growth. Consequently, the rapid turnover within the patient pool limits the commercial potential of prolonged therapeutic strategies compared to other oncology sectors characterized by higher survival rates.

Market Trends

The emergence of KRAS and NRG1 fusion targeted therapies is redefining clinical management by addressing molecular drivers that were previously considered undruggable. Unlike generic chemotherapy, these agents selectively inhibit oncogenic signaling, offering options for patients with specific mutations, a precision exemplified by new RAS-selective inhibitors showing durable activity. For instance, Revolution Medicines reported in October 2024 that their agent RMC-6236 achieved a median overall survival of 14.5 months in patients with previously treated pancreatic ductal adenocarcinoma harboring RAS mutations, highlighting a shift toward personalized interventions that improve survival outcomes in distinct molecular subtypes.

Simultaneously, the advancement of Tumor Treating Fields (TTFields) introduces a non-invasive modality that disrupts cancer cell division without causing systemic toxicity. This technology is increasingly integrated with standard chemotherapy to enhance efficacy in unresectable cases, a validity confirmed by recent data demonstrating survival improvements. According to Novocure's December 2024 announcement regarding the Phase 3 PANOVA-3 trial, patients treated with TTFields plus chemotherapy achieved a median overall survival of 16.20 months compared to 14.16 months for chemotherapy alone, establishing device-based therapeutics as a vital component of modern multimodal care regimens.

Key Market Players

Glaxosmithkline Plc

Merck & Co., Inc.

Bristol-Myers Squibb Company

Getwell

Ipsen Biopharmaceuticals, Inc.

Novartis Pharmaceuticals Corporation

Pfizer Inc.

Bayer HealthCare Pharmaceuticals, Inc.

Genentech USA, Inc.

AstraZeneca Plc

Report Scope

In this report, the Global Locally Advanced Pancreatic Cancer Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

- Locally Advanced Pancreatic Cancer Market, By Therapy
  - Chemotherapy
  - Immunotherapy
  - Targeted Therapy
  - Radiation Therapy
  - Surgery
- Locally Advanced Pancreatic Cancer Market, By Route of administration
  - Oral
  - Injectables
  - Others

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Locally Advanced Pancreatic Cancer Market, By End-User

- Hospitals & Clinics
- Ambulatory Care Centers
- Others

Locally Advanced Pancreatic Cancer Market, By Region

- North America
  - United States
  - Canada
  - Mexico
- Europe
  - France
  - United Kingdom
  - Italy
  - Germany
  - Spain
- Asia Pacific
  - China
  - India
  - Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Locally Advanced Pancreatic Cancer Market.

Available Customizations:

Global Locally Advanced Pancreatic Cancer Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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