

Pancreatic Cancer Therapeutics & Diagnostics Market – Global Industry Size, Share, Trends, Opportunity, & Forecast 2018-2028 Segmented By Type (Treatment {Targeted Therapies, Chemotherapy, Surgery, Other}, Diagnostics {Imaging, Biopsy, Endoscopic Ultrasound, Other}), By End-User (Hospital & Clinic, Ambulatory Centers, Others) By Region, Competition

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Abstracts

Global Pancreatic Cancer Therapeutics & Diagnostics Market is anticipated to project robust growth in the forecast period. The Global Pancreatic Cancer Therapeutics & Diagnostics Market is a dynamic and evolving sector of the healthcare industry, driven by the urgent need to combat one of the deadliest forms of cancer.

Pancreatic cancer is a relatively rare cancer, accounting for a small percentage of all cancer cases. However, it is one of the most lethal forms of cancer, with a low survival rate. The incidence of pancreatic cancer varies by region, with some areas experiencing higher rates than others. Risk factors include age, family history, smoking, obesity, and certain genetic mutations.

Key Market Drivers

Rising Incidence of Pancreatic Cancer

The rising incidence of pancreatic cancer stands as a significant driver behind the growth of the Global Pancreatic Cancer Therapeutics & Diagnostics Market. This trend is deeply rooted in several related factors that collectively shape the landscape of pancreatic cancer diagnosis and treatment. The primary contributors to the increasing

incidence of pancreatic cancer is the aging global population. As the average age of the population increases, so does the risk of developing cancer, including pancreatic cancer. Older individuals are more susceptible to this disease due to the cumulative effects of genetic mutations and exposure to risk factors over time. Moreover, the aging population leads to a higher demand for healthcare services, including cancer diagnosis and treatment, thereby driving the growth of the therapeutics and diagnostics market.

Lifestyle choices and environmental factors play a pivotal role in the rising incidence of pancreatic cancer. Smoking, for instance, remains one of the most significant modifiable risk factors for pancreatic cancer. The prevalence of smoking, though decreasing in many regions, continues to contribute to the disease's incidence. Additionally, diets high in processed foods, red meat, and low in fruits and vegetables have been associated with an increased risk of pancreatic cancer. As urbanization and changes in dietary habits persist, the number of individuals at risk rises, boosting the demand for early detection and treatment. Obesity and diabetes, two interrelated health conditions, are closely linked to the development of pancreatic cancer. Obesity increases the risk of diabetes, and both conditions independently elevate the risk of pancreatic cancer. The global obesity epidemic, fueled by sedentary lifestyles and unhealthy dietary choices, has led to a surge in individuals at risk of pancreatic cancer. Consequently, healthcare providers are witnessing a growing number of patients with these risk factors, driving the need for efficient diagnostics and therapeutic options.

Genetic factors also contribute significantly to the rising incidence of pancreatic cancer. Certain hereditary conditions, such as Lynch syndrome, BRCA mutations, and familial atypical multiple mole melanoma (FAMMM) syndrome, increase the likelihood of developing pancreatic cancer. The increased availability and affordability of genetic testing have led to more individuals discovering their genetic predisposition to this disease. Consequently, genetic counseling and personalized screening programs are on the rise, boosting the demand for diagnostic services. Advancements in medical technology have improved the early detection of pancreatic cancer. Enhanced imaging techniques, such as magnetic resonance imaging (MRI) and endoscopic ultrasound, enable healthcare providers to detect tumors at earlier, more treatable stages. This, in turn, contributes to the perception that more individuals are developing pancreatic cancer, as cases that were previously undetected or misdiagnosed are now being accurately identified.

Advancements in Diagnostic Technologies

Advancements in diagnostic technologies represent a pivotal driver of the Global Pancreatic Cancer Therapeutics & Diagnostics Market. These innovations have transformed the landscape of pancreatic cancer diagnosis in numerous ways, fostering early detection, accurate assessment, and personalized treatment strategies. The foremost reason for the importance of diagnostic technology is its ability to detect pancreatic cancer at earlier, more treatable stages. Traditional diagnostic methods often failed to identify the disease until it had reached an advanced, less curable stage. However, advancements in imaging modalities, such as computed tomography (CT) scans, magnetic resonance imaging (MRI), and endoscopic ultrasound (EUS), have enabled healthcare providers to visualize tumors and abnormalities with higher precision. This early detection not only increases the chances of successful treatment but also improves patient prognosis.

Modern diagnostic technologies offer a level of accuracy and precision that was previously unattainable. High-resolution imaging techniques, coupled with computer-aided detection and artificial intelligence algorithms, allow for the precise identification and characterization of pancreatic tumors. This accuracy is vital for guiding treatment decisions, including surgical interventions and targeted therapies. Another significant advancement is the identification of specific biomarkers associated with pancreatic cancer. These biomarkers, including CA 19-9 and genetic mutations, can be detected through blood tests and molecular diagnostics. The ability to identify these markers early in the disease process enhances the potential for timely intervention and personalized treatment approaches.

Genomic profiling has emerged as a powerful tool in pancreatic cancer diagnostics. Next-generation sequencing (NGS) technologies allow for comprehensive analysis of a patient's genetic makeup, uncovering specific mutations and alterations associated with pancreatic cancer. This information guides treatment decisions, enabling the selection of targeted therapies and immunotherapies tailored to the individual patient. Diagnostic technologies have evolved to offer non-invasive methods for monitoring pancreatic cancer progression. Liquid biopsies, for example, allow for the detection of tumor-specific DNA fragments in bodily fluids, such as blood or urine. This approach provides a less invasive means of tracking disease status and treatment response, reducing the need for repeated invasive procedures.

Aging Population

The aging population is a significant driver of the Global Pancreatic Cancer Therapeutics & Diagnostics Market. This demographic trend has a profound impact on

the incidence, prevalence, and management of pancreatic cancer, creating a strong demand for therapeutic and diagnostic solutions the most critical reasons for the influence of the aging population is the heightened risk of developing pancreatic cancer with age. Pancreatic cancer primarily affects older individuals, with the majority of cases diagnosed in people over the age of 65. The aging process introduces cumulative genetic mutations and prolonged exposure to risk factors, making older individuals more susceptible to the disease. As the global population continues to age, the absolute number of pancreatic cancer cases naturally rises, driving the demand for therapeutic and diagnostic solutions.

Demographic shifts, characterized by a higher proportion of older individuals, directly impact the prevalence of pancreatic cancer. As birth rates decline and life expectancy increases, the proportion of elderly people in the population expands. This demographic shift has a multiplier effect on the incidence of age-related diseases like pancreatic cancer, further intensifying the need for effective therapeutics and diagnostics. Older individuals often have complex healthcare needs, and pancreatic cancer management is no exception. Due to factors such as comorbidities and reduced physiological reserves, the treatment and diagnostic approaches for older patients may differ from those for younger individuals. Healthcare providers must tailor their strategies to address these unique needs, driving the development of age-specific therapies and diagnostic tools. The growing awareness of the association between aging and pancreatic cancer risk has led to increased screening and early detection efforts among older populations. Healthcare providers are more vigilant in screening elderly patients, especially those with risk factors such as a family history of pancreatic cancer or other predisposing conditions. This proactive approach amplifies the demand for advanced diagnostic technologies capable of detecting the disease at its earliest stages.

Improvements in healthcare, medical treatments, and overall living conditions have extended the life expectancy of the elderly population. While longer life is a positive development, it also means that more individuals are susceptible to age-related diseases like pancreatic cancer. As older individuals continue to lead active lives, they seek comprehensive healthcare services that encompass cancer diagnostics and treatment...

Growing Awareness about Pancreatic Cancer

Growing awareness about pancreatic cancer is a potent driver of the Global Pancreatic Cancer Therapeutics & Diagnostics Market. This heightened awareness has led to a range of positive effects on the market, from early detection to increased research

funding. the most significant impact of growing awareness is the emphasis on early detection and diagnosis of pancreatic cancer. Pancreatic cancer is notoriously challenging to detect in its early stages due to minimal symptoms. However, increased awareness campaigns have educated the public and healthcare professionals about the risk factors and warning signs associated with the disease. Consequently, individuals are more likely to seek medical attention at the onset of symptoms, leading to earlier diagnoses and a higher likelihood of curative treatment options.

Growing awareness has played a crucial role in helping people recognize potential symptoms of pancreatic cancer. Symptoms such as jaundice, unexplained weight loss, abdominal pain, and changes in bowel habits are now more likely to raise concerns among individuals and healthcare providers. This heightened vigilance prompts timely medical evaluations and, subsequently, diagnostic tests.

Increased awareness has spurred the development of screening programs for pancreatic cancer, especially for individuals at higher risk, such as those with a family history of the disease or specific genetic predispositions. Screening programs often include imaging tests and blood markers, which contribute to early detection efforts and stimulate demand for diagnostic services. The growth of awareness has led to the formation of advocacy and support groups dedicated to pancreatic cancer. These organizations work tirelessly to raise funds, promote research, and provide resources for patients and their families. Their efforts not only bolster the fight against the disease but also draw attention to the need for improved therapeutics and diagnostics. Medical professionals are increasingly educated about the complexities of pancreatic cancer diagnosis and treatment. Continuing medical education programs and conferences focused on pancreatic cancer ensure that healthcare providers remain up to date with the latest diagnostic technologies and treatment options. This knowledge translates into more accurate and timely diagnoses for patients.

Key Market Challenges

Late-Stage Diagnosis

Pancreatic cancer is notorious for its late-stage diagnosis. Most patients are asymptomatic in the early stages, and symptoms often mimic other, less severe conditions. By the time symptoms become noticeable, the cancer has often reached an advanced stage, making it less amenable to curative treatment. This late-stage diagnosis challenge is compounded by the lack of reliable early detection methods, unlike other cancers like breast or colon cancer.

Late-stage diagnosis affects the demand for therapeutic and diagnostic products. The market's growth potential is limited because a substantial portion of patients may not qualify for curative treatments. Instead, they may only be eligible for palliative care or supportive treatments, reducing the market's scope for advanced therapeutics.

High Treatment Costs

Pancreatic cancer treatment can be prohibitively expensive. The disease often necessitates aggressive interventions, including surgery, chemotherapy, radiation therapy, and personalized targeted therapies. These treatments not only involve substantial direct medical costs but also indirect costs related to hospitalization, supportive care, and managing side effects. Additionally, the complexity of pancreatic cancer cases often requires specialized healthcare providers and facilities, further driving up costs.

High treatment costs pose financial burdens on patients, healthcare systems, and insurers. This can limit patient access to advanced therapies and diagnostics, impacting market growth. Moreover, it can lead to delays in seeking treatment and influence treatment choices based on cost considerations rather than optimal clinical outcomes.

Limited Therapeutic Options

Pancreatic cancer is a complex disease with limited therapeutic options, especially in advanced stages. The tumor's location, late diagnosis, and aggressive nature make it challenging to treat effectively. Chemotherapy, the most common treatment, often provides only modest survival benefits. Immunotherapies, which have shown promise in other cancers, have had limited success in pancreatic cancer. Targeted therapies are available for specific genetic mutations, but not all patients have actionable mutations.

Limited therapeutic options restrict the market's growth potential by reducing the number of patients who can benefit from specific treatments. Additionally, the high mortality rate of pancreatic cancer means that patients may have limited time to explore different therapies, impacting market demand. The development of effective therapies for pancreatic cancer remains a critical unmet need in the field.

Key Market Trends

Advancements in Personalized Medicine:

Personalized medicine is a significant trend in the treatment of pancreatic cancer. This approach tailors treatment plans based on an individual patient's genetic makeup, tumor characteristics, and other factors. Advancements in genomics and molecular profiling technologies have made it possible to identify specific mutations and biomarkers associated with pancreatic cancer. This trend is driven by the need for more effective and targeted therapies, as standard treatments have shown limited success in improving survival rates for pancreatic cancer patients.

The adoption of personalized medicine is expanding the range of therapeutic options available in the market. Pharmaceutical companies are developing targeted therapies that address specific genetic mutations, offering new hope for patients. Diagnostic tools that enable genetic profiling and guide treatment decisions are also in high demand. This trend is expected to drive market growth as more personalized treatment approaches become available.

Advances in Early Detection Technologies

Early detection of pancreatic cancer is a key factor in improving patient outcomes. Recent advancements in diagnostic technologies, such as liquid biopsies and improved imaging techniques, are enhancing the ability to detect pancreatic cancer at earlier, more treatable stages. This trend is driven by the recognition that early diagnosis can significantly increase the chances of successful treatment and long-term survival.

The demand for advanced diagnostic tools and early detection methods is on the rise. Liquid biopsies, which can detect tumor-specific DNA fragments in bodily fluids like blood, are gaining prominence for their non-invasive nature and potential to detect cancer at its earliest stages. Imaging technologies like magnetic resonance imaging (MRI) and endoscopic ultrasound (EUS) continue to evolve, providing higher-resolution images for accurate diagnosis. These advancements are expanding the market's diagnostic capabilities and improving patient outcomes.

Immunotherapy as a Promising Treatment Option

Immunotherapy has emerged as a promising treatment option in the field of pancreatic cancer. This trend is driven by a better understanding of the tumor microenvironment and the immune system's role in cancer progression. Researchers are developing immunotherapies, including immune checkpoint inhibitors and cancer vaccines, to stimulate the patient's immune response against pancreatic cancer cells. While

challenges remain, such as the immunosuppressive nature of the pancreatic tumor microenvironment, the potential for immunotherapy to improve survival rates is driving considerable interest and investment.

The inclusion of immunotherapies in the treatment arsenal for pancreatic cancer is expanding the market's offerings. Pharmaceutical companies are conducting clinical trials to evaluate the effectiveness of these therapies, and some immunotherapies have received regulatory approvals for specific indications. As the research in this area continues to progress and more clinical data becomes available, the market for immunotherapies and related diagnostics is expected to grow significantly.

Segmental Insights

Type Insights

Based on the category of Type, the treatment segment emerged as the dominant player in the global market for Pancreatic Cancer Therapeutics & Diagnostics in 2022. Pancreatic cancer is associated with high incidence and mortality rates, making it one of the deadliest cancers. The disease often progresses silently without noticeable symptoms until it reaches advanced stages. As a result, patients are frequently diagnosed when curative treatment options are limited. This stark reality emphasizes the critical role of treatment in managing pancreatic cancer and prolonging patient survival.

The challenging nature of pancreatic cancer means that curative treatment options, such as surgery, are feasible for only a minority of patients. Surgical resection is possible when the cancer is localized and has not spread to other organs. However, due to late-stage diagnosis, many patients are ineligible for surgery, leaving them with limited curative options. Consequently, non-surgical treatments, such as chemotherapy and radiation therapy, become the primary means of managing the disease. Recent years have witnessed significant advancements in the development of therapeutic options for pancreatic cancer. These include targeted therapies, immunotherapies, and combination treatment regimens. Targeted therapies, in particular, focus on specific genetic mutations associated with pancreatic cancer, offering more precise and effective treatment approaches. These advancements have expanded the range of therapeutic options available to patients, making treatment a more prominent aspect of managing the disease.

Clinical trials and ongoing research efforts are heavily centered around developing and

testing novel treatment modalities for pancreatic cancer. The urgency of addressing this challenging disease has driven pharmaceutical companies, research institutions, and healthcare organizations to invest in clinical trials exploring innovative therapies. These trials often focus on improving existing treatments, developing new drug combinations, and evaluating the efficacy of immunotherapies, all of which contribute to the dominance of the treatment segment. Patients and their families actively seek better treatment options for pancreatic cancer. The devastating impact of the disease on patient quality of life and survival underscores the importance of effective treatments. Patient advocacy groups and pancreatic cancer awareness initiatives have also played a role in raising the profile of treatment options and encouraging research into more advanced therapeutics. These factors are expected to drive the growth of this segment.

End-User Insights

The hospital & clinics segment is projected to experience rapid growth during the forecast period. Hospitals and clinics are equipped to provide comprehensive care to pancreatic cancer patients. They offer a range of diagnostic services, including advanced imaging, biopsies, and laboratory testing, which are essential for accurate diagnosis and staging of the disease. Additionally, these institutions have the facilities and expertise to provide various treatment modalities, such as surgery, chemotherapy, radiation therapy, and palliative care, all under one roof. This integrated approach ensures that patients receive the full spectrum of care, from diagnosis to treatment and supportive care, contributing to the dominance of this segment.

The complex nature of pancreatic cancer requires specialized multidisciplinary teams composed of oncologists, surgeons, radiologists, pathologists, nurses, and other healthcare professionals. Hospitals and clinics often have established these teams with expertise in pancreatic cancer management. The collaborative efforts of these specialists enhance patient outcomes, as they can tailor treatment plans to the individual needs of each patient. This specialization and coordination are key reasons why patients seek care in hospital and clinic settings. Hospitals and clinics typically have access to state-of-the-art diagnostic and treatment technologies. Advanced imaging modalities, such as magnetic resonance imaging (MRI), computed tomography (CT) scans, and endoscopic ultrasound (EUS), are readily available for accurate diagnosis and staging. Furthermore, these institutions can offer the latest therapeutic options, including targeted therapies, immunotherapies, and participation in clinical trials. Access to cutting-edge technologies and treatments makes hospitals and clinics attractive choices for patients seeking the most advanced care. These factors collectively contribute to the growth of this segment.

Regional Insights

North America emerged as the dominant player in the global Pancreatic Cancer Therapeutics & Diagnostics market in 2022, holding the largest market share in terms of value. The United States and Canada, boasts a highly advanced and well-developed healthcare infrastructure. This includes state-of-the-art hospitals, clinics, research institutions, and diagnostic facilities. The availability of cutting-edge technologies and a skilled workforce in these healthcare settings makes North America a hub for pancreatic cancer diagnosis and treatment. The region has been an early adopter of advanced diagnostic technologies and treatment modalities. This early adoption ensures that patients have access to the latest advancements in pancreatic cancer diagnostics, including molecular profiling and imaging techniques. This, in turn, contributes to the dominant position of North America in the market. North America has a robust research ecosystem, with numerous pharmaceutical companies, research institutions, and academic centers actively engaged in pancreatic cancer research and clinical trials. The availability of research funding, patient participation in trials, and collaborative efforts between academia and industry drive innovation in therapies and diagnostics.

The Asia-Pacific market is poised to be the fastest-growing market, offering lucrative growth opportunities for Pancreatic Cancer Therapeutics & Diagnostics players during the forecast period. Factors such as Several countries in the Asia-Pacific region are investing in expanding and modernizing their healthcare infrastructure. This includes the development of specialized cancer treatment centers and the adoption of advanced diagnostic technologies. As healthcare infrastructure improves, access to pancreatic cancer care and diagnostics becomes more widespread. The Asia-Pacific region represents emerging markets for pharmaceutical and diagnostic companies. These markets offer substantial growth opportunities due to the large population and increasing healthcare expenditures. As a result, companies are keen to establish a presence in this region, leading to market growth. Clinical research and trials related to pancreatic cancer are gaining momentum in the Asia-Pacific region. This is driven by the need to develop region-specific treatment approaches and diagnostic tools. As more research is conducted and clinical trials are initiated, the region is poised to witness rapid advancements in pancreatic cancer care.

Key Market Players

Myriad Genetics Inc.

Pfizer Inc.

Novartis AG

Bristol-Myers Squibb Company

AstraZeneca PLC

Amgen Inc.

Viartis Inc.

Boston Scientific Corporation

FUJIFILM Holdings Corporation

Canon Inc. (canon Medical Systems Corporation)

Rafael Holdings Inc

Report Scope:

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

Pancreatic Cancer Therapeutics & Diagnostics Market, By Type:

Treatment

Diagnostics

Pancreatic Cancer Therapeutics & Diagnostics 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

Kuwait

Turkey

Egypt

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Pancreatic Cancer Therapeutics & Diagnostics Market.

Available Customizations:

Global Pancreatic Cancer Therapeutics & Diagnostics market report with the given market data, Tech Sci 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).

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

4. VOICE OF CUSTOMER

5. GLOBAL PANCREATIC CANCER THERAPEUTICS & DIAGNOSTICS MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Type (Treatment {Targeted Therapies, Chemotherapy, Surgery, Other}, Diagnostics {Imaging, Biopsy, Endoscopic Ultrasound, Other})

- 5.2.2. By End-User (Hospital & Clinics, Ambulatory Centers, Others)
- 5.2.3. By Region
- 5.2.4. By Company (2022)
- 5.3. Market Map

6. NORTH AMERICA PANCREATIC CANCER THERAPEUTICS & DIAGNOSTICS MARKET OUTLOOK

- 6.1. Market Size & Forecast
 - 6.1.1. By Value
- 6.2. Market Share & Forecast
 - 6.2.1. By Type
 - 6.2.2. By End-User
 - 6.2.3. By Country
- 6.3. North America: Country Analysis
 - 6.3.1. United States Pancreatic Cancer Therapeutics & Diagnostics Market Outlook
 - 6.3.1.1. Market Size & Forecast
 - 6.3.1.1.1. By Value
 - 6.3.1.2. Market Share & Forecast
 - 6.3.1.2.1. By Type
 - 6.3.1.2.2. By End-User
 - 6.3.2. Canada Pancreatic Cancer Therapeutics & Diagnostics Market Outlook
 - 6.3.2.1. Market Size & Forecast
 - 6.3.2.1.1. By Value
 - 6.3.2.2. Market Share & Forecast
 - 6.3.2.2.1. By Type
 - 6.3.2.2.2. By End-User
 - 6.3.3. Mexico Pancreatic Cancer Therapeutics & Diagnostics Market Outlook
 - 6.3.3.1. Market Size & Forecast
 - 6.3.3.1.1. By Value
 - 6.3.3.2. Market Share & Forecast
 - 6.3.3.2.1. By Type
 - 6.3.3.2.2. By End-User

7. EUROPE PANCREATIC CANCER THERAPEUTICS & DIAGNOSTICS MARKET OUTLOOK

- 7.1. Market Size & Forecast
 - 7.1.1. By Value

7.2. Market Share & Forecast

7.2.1. By Type

7.2.2. By End-User

7.3. Europe: Country Analysis

7.3.1. Germany Pancreatic Cancer Therapeutics & Diagnostics Market Outlook

7.3.1.1. Market Size & Forecast

7.3.1.1.1. By Value

7.3.1.2. Market Share & Forecast

7.3.1.2.1. By Type

7.3.1.2.2. By End-User

7.3.2. United Kingdom Pancreatic Cancer Therapeutics & Diagnostics Market Outlook

7.3.2.1. Market Size & Forecast

7.3.2.1.1. By Value

7.3.2.2. Market Share & Forecast

7.3.2.2.1. By Type

7.3.2.2.2. By End-User

7.3.3. Italy Pancreatic Cancer Therapeutics & Diagnostics Market Outlook

7.3.3.1. Market Size & Forecast

7.3.3.1.1. By Value

7.3.3.2. Market Share & Forecast

7.3.3.2.1. By Type

7.3.3.2.2. By End-User

7.3.4. France Pancreatic Cancer Therapeutics & Diagnostics Market Outlook

7.3.4.1. Market Size & Forecast

7.3.4.1.1. By Value

7.3.4.2. Market Share & Forecast

7.3.4.2.1. By Type

7.3.4.2.2. By End-User

7.3.5. Spain Pancreatic Cancer Therapeutics & Diagnostics Market Outlook

7.3.5.1. Market Size & Forecast

7.3.5.1.1. By Value

7.3.5.2. Market Share & Forecast

7.3.5.2.1. By Type

7.3.5.2.2. By End-User

8. ASIA-PACIFIC PANCREATIC CANCER THERAPEUTICS & DIAGNOSTICS MARKET OUTLOOK

8.1. Market Size & Forecast

- 8.1.1. By Value
- 8.2. Market Share & Forecast
 - 8.2.1. By Type
 - 8.2.2. By End-User
- 8.3. Asia-Pacific: Country Analysis
 - 8.3.1. China Pancreatic Cancer Therapeutics & Diagnostics Market Outlook
 - 8.3.1.1. Market Size & Forecast
 - 8.3.1.1.1. By Value
 - 8.3.1.2. Market Share & Forecast
 - 8.3.1.2.1. By Type
 - 8.3.1.2.2. By End-User
 - 8.3.2. India Pancreatic Cancer Therapeutics & Diagnostics Market Outlook
 - 8.3.2.1. Market Size & Forecast
 - 8.3.2.1.1. By Value
 - 8.3.2.2. Market Share & Forecast
 - 8.3.2.2.1. By Type
 - 8.3.2.2.2. By End-User
 - 8.3.3. Japan Pancreatic Cancer Therapeutics & Diagnostics Market Outlook
 - 8.3.3.1. Market Size & Forecast
 - 8.3.3.1.1. By Value
 - 8.3.3.2. Market Share & Forecast
 - 8.3.3.2.1. By Type
 - 8.3.3.2.2. By End-User
 - 8.3.4. South Korea Pancreatic Cancer Therapeutics & Diagnostics Market Outlook
 - 8.3.4.1. Market Size & Forecast
 - 8.3.4.1.1. By Value
 - 8.3.4.2. Market Share & Forecast
 - 8.3.4.2.1. By Type
 - 8.3.4.2.2. By End-User
 - 8.3.5. Australia Pancreatic Cancer Therapeutics & Diagnostics Market Outlook
 - 8.3.5.1. Market Size & Forecast
 - 8.3.5.1.1. By Value
 - 8.3.5.2. Market Share & Forecast
 - 8.3.5.2.1. By Type
 - 8.3.5.2.2. By End-User

9. SOUTH AMERICA PANCREATIC CANCER THERAPEUTICS & DIAGNOSTICS MARKET OUTLOOK

9.1. Market Size & Forecast

9.1.1. By Value

9.2. Market Share & Forecast

9.2.1. By Type

9.2.2. By End-User

9.3. South America: Country Analysis

9.3.1. Brazil Pancreatic Cancer Therapeutics & Diagnostics Market Outlook

9.3.1.1. Market Size & Forecast

9.3.1.1.1. By Value

9.3.1.2. Market Share & Forecast

9.3.1.2.1. By Type

9.3.1.2.2. By End-User

9.3.2. Argentina Pancreatic Cancer Therapeutics & Diagnostics Market Outlook

9.3.2.1. Market Size & Forecast

9.3.2.1.1. By Value

9.3.2.2. Market Share & Forecast

9.3.2.2.1. By Type

9.3.2.2.2. By End-User

9.3.3. Colombia Pancreatic Cancer Therapeutics & Diagnostics Market Outlook

9.3.3.1. Market Size & Forecast

9.3.3.1.1. By Value

9.3.3.2. Market Share & Forecast

9.3.3.2.1. By Type

9.3.3.2.2. By End-User

10. MIDDLE EAST AND AFRICA PANCREATIC CANCER THERAPEUTICS & DIAGNOSTICS MARKET OUTLOOK

10.1. Market Size & Forecast

10.1.1. By Value

10.2. Market Share & Forecast

10.2.1. By Type

10.2.2. By End-User

10.3. MEA: Country Analysis

10.3.1. South Africa Pancreatic Cancer Therapeutics & Diagnostics Market Outlook

10.3.1.1. Market Size & Forecast

10.3.1.1.1. By Value

10.3.1.2. Market Share & Forecast

10.3.1.2.1. By Type

- 10.3.1.2.2. By End-User
- 10.3.2. Saudi Arabia Pancreatic Cancer Therapeutics & Diagnostics Market Outlook
 - 10.3.2.1. Market Size & Forecast
 - 10.3.2.1.1. By Value
 - 10.3.2.2. Market Share & Forecast
 - 10.3.2.2.1. By Type
 - 10.3.2.2.2. By End-User
- 10.3.3. UAE Pancreatic Cancer Therapeutics & Diagnostics Market Outlook
 - 10.3.3.1. Market Size & Forecast
 - 10.3.3.1.1. By Value
 - 10.3.3.2. Market Share & Forecast
 - 10.3.3.2.1. By Type
 - 10.3.3.2.2. By End-User

11. MARKET DYNAMICS

- 11.1. Drivers & Challenges

12. MARKET TRENDS & DEVELOPMENTS

- 12.1. Recent Developments
- 12.2. Product Launches
- 12.3. Mergers & Acquisitions

13. GLOBAL PANCREATIC CANCER THERAPEUTICS & DIAGNOSTICS MARKET: SWOT ANALYSIS

14. COMPETITIVE LANDSCAPE

- 14.1. Myriad Genetics Inc.
- 14.2. Pfizer Inc.
- 14.3. Novartis AG
- 14.4. Bristol-Myers Squibb Company
- 14.5. AstraZeneca PLC
- 14.6. Amgen Inc.
- 14.7. Viartis Inc.
- 14.8. Boston Scientific Corporation
- 14.9. FUJIFILM Holdings Corporation

14.10. Canon Inc. (canon Medical Systems Corporation)

14.11. Rafael Holdings Inc

15. STRATEGIC RECOMMENDATIONS

16. ABOUT US & DISCLAIMER

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