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Intelligent Life Science

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The PD-1 / PD-L1 Combination Therapies Revolution: New EP Vantage Report Sees Immuno-oncology Trials Triple and Keytruda Steal the Crown from Opdivo

LONDON, BOSTON, TOKYO (JUNE 1, 2017) – The battle to find a cure for cancer has led to an explosion in the number of clinical trials using anti-PD-1 and anti-PD-L1 antibodies combined with other therapeutic approaches, says a new report by EP Vantage, the wholly independent editorial arm of Evaluate, the trusted provider of life science commercial intelligence.

When EP Vantage published its first PD-1/PD-L1 combination report in November 2015 there were 215 studies, as of April 2017 there were 765. The latest PD-1/PD-L1 report, released today, also reveals that Keytruda has overtaken Opdivo as the combination partner of choice.

Other key findings include:

- There are now 268 combo trials involving Keytruda and 242 with Opdivo, of which 86 combine Opdivo with Yervoy. Keytruda's dominance comes as the drug continues to impress in clinical trials
- The number of studies combining PD-1/PD-L1s with chemotherapy have surged, potentially spurred by Roche's efforts with Tecentriq
- IO-IO combos also represent a significant part of the analysis. Keytruda, Opdivo and Tecentriq are in 56, 54 and 32 IO-IO combo studies respectively
- The most popular indication for combinations is lung cancer, which makes up the biggest single market (16%), followed by melanoma and sarcoma (13%), which has so far showed the best efficacy for PD-1/PD-L1s. But uro-gynecological (12%) and haematological cancers are becoming more prevalent

There is little to suggest a slowdown in this field, given the speed with which immuno-oncology combination studies have proliferated and the blockbuster potential of the anti-PD-1/PD-L1 class.

Combination trials may also be driven by a desire to improve on the striking efficacy of the first wave of anti-PD-1/PD-L1 agents, but also by a need to improve on the limited efficacy seen with many novel oncology projects.

"It will be interesting to watch whether combinations with small molecules and other therapeutic agents will win out in the end," said report author Jacob Plieth.

"However, the focus will increasingly turn from throwing everything into a combination and seeing what sticks to generating real data. Sprinkling magic immuno-oncology dust will not come to the rescue of mediocre assets," added Mr Plieth. "Ultimately, it will all come down to hard data."

To download this free report, please visit: www.evaluategroup.com/PD1-2017 . You can also meet our EP Vantage reporters Jacob Plieth @JacobPlieth and Jon Gardner @ByJonGardner at ASCO and keep track of all the action by following @EPVantage.

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Notes to Editors

This report provides an analysis of the PD-1/PD-L1 clinical trial landscape. This report aims to quantify how many trials are on-going with which assets and in which cancer indications, as well as suggesting reasons why some of the most popular approaches are being pursued. The report was built using data and information sourced from Evaluate, from primary and secondary research and in-house analysis conducted by EP Vantage journalists.

About Evaluate

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