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Physician Views: Five key pre-ASCO questions on the immuno-oncology race

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Abstracts

The annual meeting of the American Society of Clinical Oncology (ASCO) will take place between May 30 and June 3, and for the second year in succession, conference headlines will be dominated by developments in the immuno-oncology (IO) space.

Data presented at last year's ASCO meeting acted as the catalyst for bullish commercial projections for the first generation of IO products, which include Bristol-Myers Squibb's already marketed Yervoy (ipilimumab; for melanoma) and the PD-1/PD-L1 inhibitors being developed by AstraZeneca, Bristol-Myers Squibb, Merck & Co. and Roche (which are initially being developed for melanoma, lung, renal and bladder cancer).

Analysts are now confidently predicting that the market for these products could be worth around $30 billion and potentially more, given that combinational use of IO therapies may facilitate expansion in multiple tumour types that are not yet being studied.

Focus in 2014 will not only be sharpened on new data presented at ASCO, but also the regulatory arena, with Merck potentially set to become the first company to secure approval for a PD-1/PD-L1 inhibitor; MK-3475 for the treatment of third-line melanoma. This could prove to be an important landmark in the race to translate R&D potential into commercial superiority.

Bristol-Myers Squibb retains pole position in the eyes of most analysts and observers, this status formed in part by the impressive combination data it presented for nivolumab and Yervoy at last year's ASCO conference in melanoma.

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The reality, however, is that the race to market has become tighter over the past 12 months; failure of the nivolumab and Yervoy combination to showcase similarly impressive data in non-small-cell lung cancer (NSCLC) patients has demonstrated that there is still much to play for, while licensing deals, collaborations and acquisitions have helped to accelerate strategies designed to identify key combinations in the IO space.

Ahead of this year's ASCO meeting, FirstWord is polling US and EU5-based oncologists to ask them five key questions about the IO development space...

> How their expectations for IO therapies being developed for melanoma, non-small-cell lung cancer (NSCLC) and renal cell carcinoma (RCC) have evolved over the past 12 months?
>
> Which IO product/regimen – and for what indication – excites them the most based on currently available data?
>
> To what percentage of first-line melanoma patients they would consider prescribing Merck's MK-3475 if approved for third-line (Yervoy-refractory) melanoma patients (based on available clinical data)?
>
> How significant a role they anticipate PD-L1 expression to play in shaping the use of PD-1/PD-L1 antibodies for the treatment of NSCLC?
>
> How significant a role they anticipate Yervoy to play in combination with PD-1/PD-L1 inhibitors in tumour types outside of melanoma?

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