Drug development companies in the APAC region have a huge opportunity to participate in the $33bn+ global immuno-oncology arena, observes GlobalData, a recognised leader in providing business information and analytics.

According to the company's recent PD-(L)1 combination pipeline visualisation chart, APAC companies contribute to the development of only a minority of all PD-(L)1 combinations, signifying that APAC companies operating in the oncology space are missing an opportunity to partner with PD-(L)1s.

GlobalData Healthcare Consultant Fenix Leung says, "The PD-(L)1 combination R&D chart indicates that companies from this region are involved in investigations of only 6.4% of all PD-(L)1 combinations, reflecting APAC development is underrepresented in the oncology space despite the high unmet need."

Currently, Japan is leading the APAC region's PD-(L)1 combination development. However, with 3 out of 15 anti-PD-(L)1 molecules under development as both monotherapy and combination, China is on course to outperform Japan in the near future.

Leung adds: "Takeda and Eisai are currently the largest APAC contributors to the PD-(L)1 combination studies; however, they need to look out for the challenges from three Chinese companies, BeiGene, Shanghai Junshi, and Jiangsu Hengrui, which have in-house anti-PD-(L)1 drugs that are being developed in combinations."

Given that anti-PD-1 monotherapy has become the SOC (standard of care) of early line treatment, non–small cell lung cancer (NSCLC) and melanoma witnessed highest number of combination studies in this region. Further, the R&D chart has shown rising number of combinations studied in solid tumour (multiple tumor types) fields, suggesting the indication strategy of companies to target as many tumour types as possible.