European Federation of Pharmaceutical Industries and Associations

Immuno-Oncology – New Ways Of Tackling Cancer

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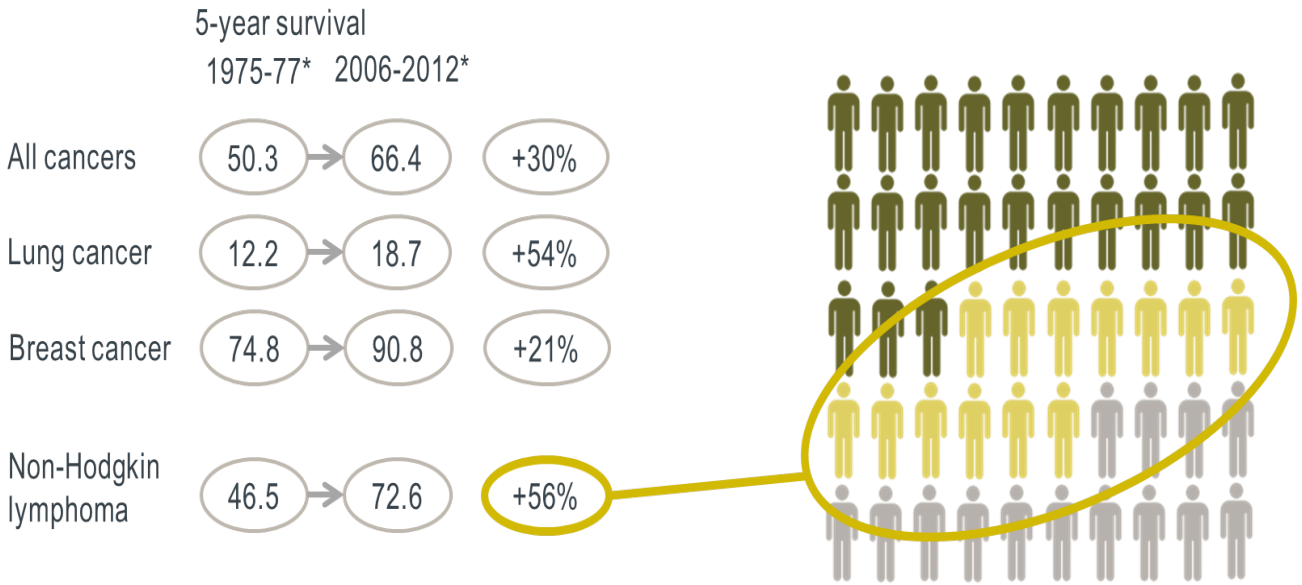
23 May 2018






"Unlocking Tomorrow's Cures"

In The Past Two Decades We Have Made Major Progress In Treating Cancer

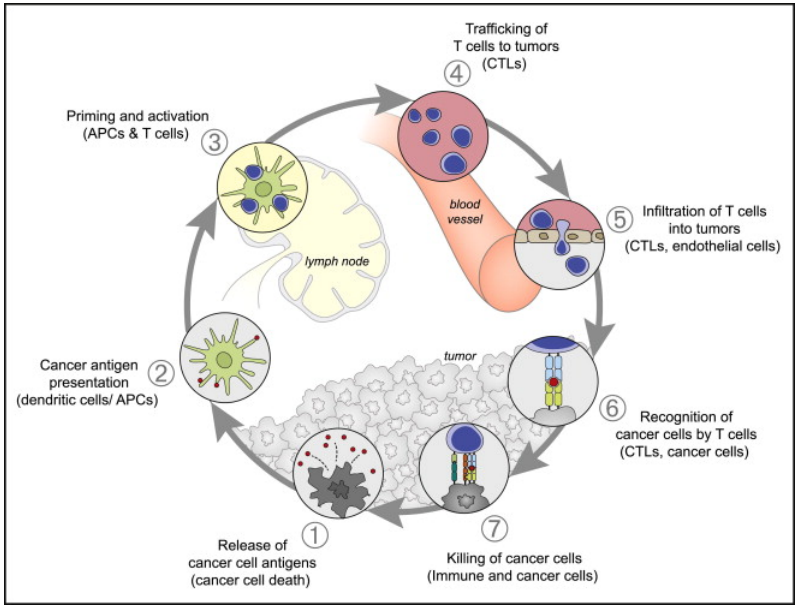


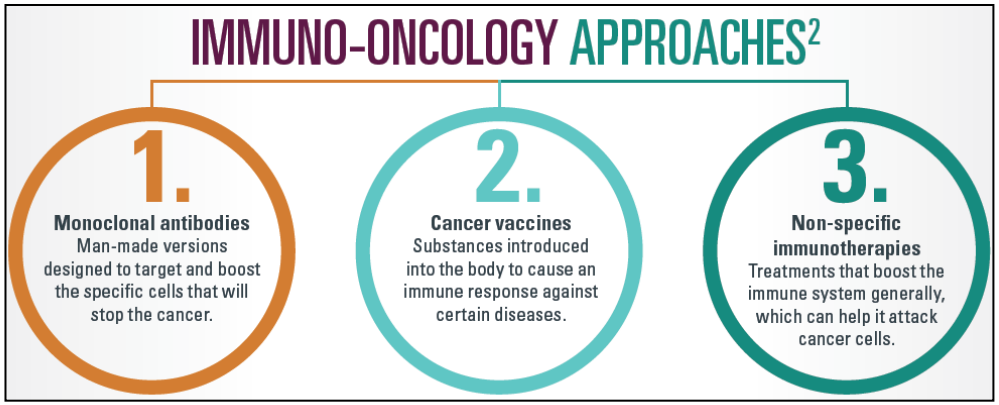
* - Changes in 5-year relative survival (%) for the most common cancers, all stages, all ages, SEER 9*, 1975–2012
Source: Jemal A et al. (2017), Annual Report to the Nation on the Status of Cancer, 1975-2014, Featuring Survival; JNCI J Natl Cancer Inst 109(9)

Today, 7 out of 10 patients with Non-Hodgkin Lymphoma live at least 5 years. In the mid-70's it was less then half.

IMMUNO-ONCOLOGY – THE BASICS

CANCER IMMUNITY CYCLE

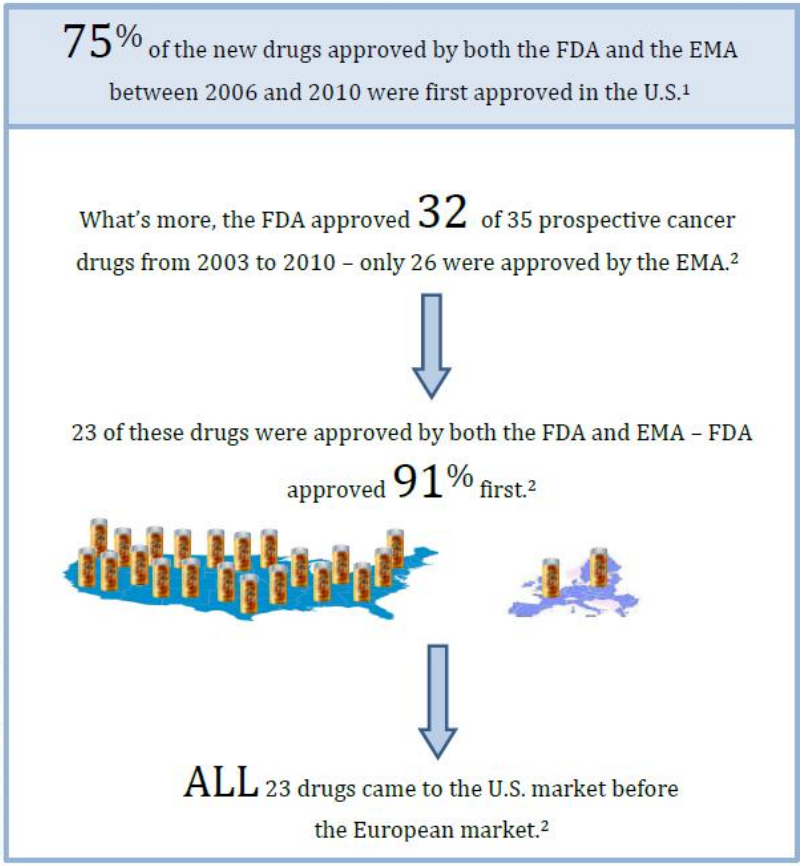




CHEN & MELLMAN. IMMUNITY 2013,

AMERICAN CANCER SOCIETY. CANCER IMMUNOTHERAPY. AVAILABLE AT: *HTTP://WWW.CANCER.ORG/ACS/GROUPS/CID/DOCUMENTS/ WEBCONTENT/003013-PDF.PDF*

Differences In Approvals By FDA & EMA



Sources: [1] FDA: Is the US really slower than Europe at approving new drugs? Accessed March 11, 2012. Available: http://www.fda.gov/downloads/AboutFDA/Transparency/Basics/UCM247470.pdf
[2] Roberts SA, Allen JD, Sigal EV. Despite Criticism Of The FDA Review Process, New Cancer Drugs Reach Patients Sooner In The United States Than In Europe. Health Affairs, June 2011.

Patient Access Solutions Across Europe

Germany grants immediate access & allows for bundling of indications.

France and the UK have specific access schemes in place such as ATU and EAMS, respectively

Italy has created an Innovation Fund to incentivise access to innovative cancer medicines

Belgium, Denmark and The Netherlands have created so-called Multi-Year-Multi-Indication Agreements to accelerate access to the various indications of the latest Immuno-Oncolgoy medicines

THANK YOU!

Q&A