**Immuno-Oncology Deal Trends, 2011-15**

**Description:**
Immuno-oncology is an emerging field in medicine that has the potential to radically change how cancer is treated. The Big Pharma and Mid Pharma peer sets are an integral part of development and have been furthering efforts via deal-making. The peer groups' deal volume in immuno-oncology has grown over sevenfold from 2011 to 2015.

More than 50% of the immuno-oncology deals between 2011 and 2015 involved testing combinations that may eventually address previously unresponsive patients and/or additional tumor types. Combination agreements are structured differently to traditional licensing deals and are often pre-competitive in nature, early stage, and involve only one or two single studies.

This report addresses the following questions:
- What is the growth of immuno-oncology deal-making over the last five years in volume and dollar value, and how does that compare with overall oncology deal-making?
- Who are the top players in immuno-oncology deal-making, and what were the structures of their key deals?
- Which solid and hematological tumor indications and anticancer immunotherapy targets are most involved immuno-oncology deals?
- What strategies are being implemented by some of the most influential companies in immuno-oncology?

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**Executive Summary**

**Immuno-Oncology: A Brief Introduction**

1. Immuno-oncology has sparked multiple industry, academic, and government initiatives
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**Key Trends in Immuno-Oncology Deal-Making**

3. Immuno-oncology deal volume has rapidly increased
4. Bristol-Myers Squibb and Merck & Co were the top immuno-oncology dealmakers
5. Immuno-oncology represented most of the overall oncology deal value
6. Solid tumors, especially lung cancer and melanoma, led immuno-oncology deals
7. Non-Hodgkin's lymphoma and myeloma decreasing in overall share of deals
8. PD-L1/PD-1 dominated immuno-oncology deals
9. Immuno-oncology targets vary across indications
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**Immuno-Oncology Combinations: Collaborative Efforts**

11. Combinations are the driving force in immuno-oncology deal-making
12. Combination collaborations have unique characteristics
13. Combination collaborations
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**Immuno-Oncology Deal-Making Case Studies**

15. AstraZeneca has high hopes for durvalumab in combinations and in hematological cancers
16. Bristol-Myers Squibb aims to extend immuno-oncology leadership
17. Celgene is trying to make an impact in hematological cancers
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19. Merck & Co is banking on Keytruda combinations
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