

CHAPTER ONE: INTRODUCTION.....	1
STUDY GOALS AND OBJECTIVES.....	1
REASONS FOR DOING THIS STUDY.....	1
SCOPE OF REPORT.....	2
INTENDED AUDIENCE.....	2
METHODOLOGY.....	2
INFORMATION SOURCES.....	2
ABOUT THE AUTHOR.....	3
RELATED BCC REPORTS.....	3
BCC ONLINE SERVICES.....	4
DISCLAIMER.....	4
CHAPTER TWO: EXECUTIVE SUMMARY.....	5
<i>SUMMARY TABLE GLOBAL FORECAST FOR MARINE-DERIVED</i>	
<i>DRUGS BY TYPE, THROUGH 2016 (\$ MILLIONS)</i> .....	5
<i>SUMMARY FIGURE GLOBAL FORECAST FOR MARINE-DERIVED</i>	
<i>DRUGS, 2010-2016 (\$ MILLIONS)</i> .....	6
EXECUTIVE SUMMARY (CONTINUED).....	7
INVESTMENT AND PATH FORWARD.....	8
INVESTMENT AND PATH FORWARD (CONTINUED).....	9
KEY DRIVERS.....	10
KEY CHALLENGES.....	11
KEY TRENDS.....	11
DEVELOPMENT OF MICROBES SYMBIOTIC WITH MARINE	
INVERTEBRATES.....	12
USE OF ALGAE IN NOVEL WAYS.....	12
GREATER USE OF ESTABLISHED MARINE LIFE	
LIBRARIES.....	13
CONTINUED FOCUS ON CANCER.....	13
EXPANSION OF KNOWLEDGE AND USE OF	
CONOPEPTIDES.....	14
IMMUNE CELL INDUCEMENT THERAPY.....	14
INVESTMENT LANDSCAPE.....	14
KEY INVESTMENTS/COLLABORATIONS IN MARINE-	
DERIVED DRUG DEVELOPMENT.....	15
Abbott Laboratories and Seattle Genetics.....	15
Algenics, IFREMER, Roquette Group.....	15
Aphios Corp., Novartis, Bayer, Bristol-Myers Squibb, Eli	
Lilly, Baxter Healthcare, Sigma-Aldrich.....	15
Aquapharm Biodiscovery, Ltd. and Albany Molecular	
Research Group.....	16
ArcticZymes, Universities in Tromsø, Trondheim	
(NTNU/Norway), and Umeå (Sweden).....	16
ASKA and Yakult Honsha.....	16

AstraZeneca (MedImmune) and Xenome .....	16
Azur Pharma and Eisai.....	17
Boehringer Ingelheim, Sigma-Tau, Pacira.....	17
Cognetix, Inc. and the University of Utah .....	17
Genzyme and Abbott Laboratories .....	17
Gilead Sciences, Inc. and UC Santa Cruz .....	17
GlaxoSmithKline and Pfizer .....	18
GlaxoSmithKline/Pronova, Affiris, and Stellar Biotechnologies.....	18
GlycoMar and Verona Pharma .....	18
Johnson & Johnson, PharmaMar, and Taiho Pharmaceuticals.....	18
National Cancer Institute and Bristol-Myers Squibb.....	19
Nautilus Biosciences Canada, Inc. and the NRC-INH on the campus of UPEI .....	19
Scripps Institution of Oceanography, Trius Therapeutics, and Nereus Pharmaceuticals.....	19
Seattle Genetics, Astellas, CellDex, Millennium .....	20
Stellar Biotechnologies, Bayer Innovation, Amgen, Merck, Biovest, Néovacs, Affiris, GlaxoSmithKline.....	21
Triton Biopharma, University of Mississippi, PharmaMar.....	21
 CHAPTER THREE: OVERVIEW .....	 22
HISTORY OF MARINE DRUGS.....	22
HISTORY OF MARINE DRUGS (CONTINUED) .....	23
HISTORY OF MARINE DRUGS (CONTINUED) .....	24
<i>TABLE 1 KEY DATES IN MARINE-DERIVED DRUG HISTORY</i> .....	25
<i>TABLE 2 GROWTH IN THE INTEREST IN MARINE NATURAL     PRODUCTS BASED ON THE NUMBER OF PRODUCTS     DESCRIBED IN SCIENTIFIC JOURNALS, 1999–2004</i> .....	26
MAJOR CATEGORIES OF MARINE DRUGS.....	26
MAIN CHEMICAL CLASSES .....	27
Phenols.....	27
Steroids .....	27
Ether .....	27
Strigolactones .....	27
Peptides.....	28
MAIN MARINE LIFE GROUPINGS .....	28
Marine Microorganisms .....	29
Marine Algae.....	30
Marine Invertebrates .....	31
Porifera.....	31
Discodermolide.....	31
Cnidarians.....	32
Ctenophora.....	32

	Bryozoa .....	32
	Mollusca .....	32
	Echinoderms.....	33
	Protozoa.....	34
	Chordates .....	34
	<i>FIGURE 1 THE TUNICATE ECTEINASCIDIA TURBINATE FROM WHICH YONDELIS (TRABECTEDIN) FOR CANCER TREATMENT IS MADE</i> .....	34
	<i>FIGURE 2 MARINE SPECIES PER PHYLLUM BASED ON WORMS</i> .....	35
	<i>FIGURE 3 APPROXIMATION OF KNOWN VERSUS POSSIBLE SPECIES WITHIN THREE PHYLA, 2011</i> .....	36
CHAPTER FOUR: MARKET LANDSCAPE .....		37
COMMERCIALIZED MARINE LIFE DRUGS BY TYPE.....		37
ANTIVIRALS .....		37
ANTI-LEUKEMIC DRUG .....		37
IMMUNOTHERAPEUTIC .....		37
PAIN MEDICATION FOR CANCER PATIENTS .....		38
TRIGLYCERIDE-LOWERING DRUG.....		38
ANTICANCER DRUG .....		38
BREAST CANCER DRUG.....		39
ANTIBODY DRUG CONJUGATE.....		39
<i>FIGURE 4 COMMERCIALIZED MARINE DRUGS BY MARINE LIFE TYPE, 2011 AND 2016 (NO. OF UNITS)</i> .....		40
<i>FIGURE 5 COMMERCIALIZED MARINE DRUGS*, 2010–2016 (NUMBER OF UNITS**)</i> .....		41
<i>FIGURE 6 GLOBAL FORECAST FOR MARINE-DERIVED DRUGS* BY THERAPEUTIC CATEGORY, 2009-2016 (\$ MILLIONS)</i> .....		42
<i>FIGURE 7 COMMERCIALIZED MARINE DRUGS BY THERAPEUTIC AREA, 2011 (NUMBER OF UNITS EXPRESSED AS A %)</i> .....		43
<i>FIGURE 8 COMMERCIALIZED MARINE DRUGS BY MARINE LIFE TYPE, 2016 (NUMBER OF UNITS EXPRESSED AS A %)</i> .....		44
PHARMACEUTICAL MARKET IN GENERAL .....		44
PHARMACEUTICAL MARKET IN GENERAL (CONTINUED) .....		45
<i>FIGURE 9 GLOBAL PHARMACEUTICAL DRUG SALES, 2010 (\$ BILLIONS)</i> .....		46
<i>FIGURE 10 GEOGRAPHIC DISTRIBUTION OF PHARMACEUTICAL SALES, 2010 AND 2016 (% OF MARKET SHARE)</i> .....		47
<i>TABLE 3 TOP 10 PHARMA IN SALES IN 2010 (\$ BILLIONS)</i> .....		48
MARINE-DERIVED DRUG LANDSCAPE .....		49
APPROVED DRUGS.....		50
AZT, Retrovir, Combivir, AZT/3TC (Zidovudine).....		50
Zovirax (Acyclovir, Aciclovir) .....		51
Ara-C, Cytosar-U, or DepoCyt (Cytarabine).....		51
Vira-A (Vidarabine) .....		52

Prialt (Ziconotide).....	52
Lovaza/Omacor (Fish-Derived Omega-3s).....	53
Immucothel/(Keyhole Limpet Hemocyanin).....	53
Halaven (Eribulin Mesylate).....	54
Yondelis (Trabectedin) .....	55
Adcetris (Brentuximab Vedotin).....	56
Adcetris (Brentuximab Vedotin) (Continued).....	57
<b>TABLE 4 PHARMAMAR R&amp;D PIPELINE IN THE U.S. OR EUROPE,</b>	
<b>2011</b> .....	<b>58</b>
<b>DRUGS IN DEVELOPMENT</b> .....	<b>58</b>
Phase III.....	58
Yondelis (Trabectedin).....	58
BiovaxID.....	58
Phase II.....	59
Soblidotin (YHI-501).....	59
Aplidin (Plitidepsin).....	59
<b>TABLE 5 MARINE-DERIVED DRUGS APPROVED AND IN LATE-</b>	
<b>STAGE DEVELOPMENT*, 2011</b> .....	<b>60</b>
<b>TABLE 5 (CONTINUED)</b> .....	<b>61</b>
<b>TABLE 5 (CONTINUED)</b> .....	<b>62</b>
Affitope AD02.....	63
DMXBA .....	63
Bryostatin.....	63
Plinabulin (NPI-2358).....	64
Elisidepsin (Irvalec, PM02734) .....	64
PM1004 (Zalypsis) .....	65
Squalamine (Evison).....	65
CDX-011 .....	65
Xen2174.....	66
Phase I.....	66
Affitope AD 03.....	66
ASG-5ME .....	67
ASG-22ME.....	67
Tasidotin (ILX-651).....	67
Hemiasterlin (E7974) .....	68
Salinosporamide A (NPI-0052).....	68
SGN-75 .....	69
<b>COMMERCIALIZATION LANDSCAPE BY 2016</b> .....	<b>69</b>
<b>FORERUNNERS IN THE MARINE-DERIVED DRUG</b>	
<b>COMMERCIALIZATION RACE</b> .....	<b>69</b>
Aplidin (Plitidepsin): PharmaMar .....	69
PM01183 and Yondelis (Trabectedin): PharmaMar and	
Johnson & Johnson .....	69
Plinabulin (NPI-2358): Nereus Pharmaceuticals.....	70

CDX-011: CellDex Therapeutics .....	70
Envizon (Squalamine): Ohr Pharmaceuticals .....	70
BiovaxID: Biovest Using Stellar Biotechnologies' KLH.....	71
BiovaxID: Biovest Using Stellar ... (Continued) .....	72
MECHANISMS OF ACTION .....	72
<i>TABLE 6 MARINE-DERIVED DRUGS/DRUG CANDIDATE'S</i>	
<i>MECHANISM OF ACTION</i> .....	73
MARINE DRUG CULTIVATION .....	73
MARINE DRUG CULTIVATION (CONTINUED) .....	74
MARINE DRUG CULTIVATION (CONTINUED) .....	75
<i>TABLE 7 KEY MARINE-DERIVED PRODUCT LIBRARIES.....</i>	76
<i>TABLE 7 (CONTINUED).....</i>	77
<i>FIGURE 11 MARINE SAMPLE/MOLECULE CULTIVATION AND</i>	
<i>PROCESSING.....</i>	78
PRIVATE RESOURCES .....	79
Aphios Corp.....	79
Magellan Bioscience Group .....	79
Phycosource.....	79
Aquapharm Biodiscovery, Ltd.....	80
CASE STUDIES .....	80
Movement of Drug from Lab to Trials .....	80
Academic-Industrial Collaboration.....	81
PharmaMar Serves as an Example of an Integrated	
Developer .....	82
CHALLENGES TO CULTIVATION/PRODUCTION.....	83
REGULATORY ENVIRONMENT .....	83
PATENTS .....	84
CASE STUDIES .....	85
Development is Lagging behind Novel Patents .....	85
Patenting Areas of Growth.....	86
MARINE DRUG DEVELOPMENT: AREAS OF FOCUS TO WATCH.....	86
ENZYMES .....	86
Enzymes (Continued) .....	87
Enzymes (Continued) .....	88
EXTREMOPHILES.....	89
Extremophiles (Continued) .....	90
FLUORESCENT PROTEINS .....	91
Developments in Fluorescent Proteins.....	92
Photo-Activatable Green Fluorescent Protein (PA-	
GFP) .....	92
Dronpa Fluorescent Protein Chromophore	
Photoswitching .....	92
Photoconvertable Fluorescent Proteins .....	92
Fluorescent Proteins as Vectors.....	93

ANTICANCER/ONCOLOGY.....	93
MMP Inhibitors .....	94
Protein Kinase C.....	94
Topoisomerase Inhibitors .....	94
Nuclear Factor-κB (NF-κB) Inhibitors .....	94
Hypoxia-Inducible Factors Inhibitors.....	95
MARINE DRUG DEVELOPMENT RESEARCH .....	95
<i>TABLE 8 KEY MARINE-DERIVED DRUG RESEARCH CANDIDATES: COMPOUNDS BY DRUG TYPE.....</i>	<i>95</i>
<i>TABLE 8 (CONTINUED).....</i>	<i>96</i>
<i>TABLE 8 (CONTINUED).....</i>	<i>97</i>
<i>TABLE 8 (CONTINUED).....</i>	<i>98</i>
DISEASES/CONDITIONS MOST OFTEN TREATED WITH MARINE DRUGS.....	99
CANCER DRUG PIPELINE: 2011 AND BEYOND .....	99
Breast Cancer .....	99
<i>TABLE 9 GLOBAL PHASE III PIPELINE FOR BREAST CANCER THROUGH 2016.....</i>	<i>100</i>
Brain Cancer.....	100
<i>TABLE 10 GLOBAL PHASE III PIPELINE FOR BRAIN OR CNS CANCER, THROUGH 2016.....</i>	<i>101</i>
Bladder Cancer .....	101
<i>TABLE 11 GLOBAL PHASE III PIPELINE FOR BLADDER CANCER, THROUGH 2016.....</i>	<i>101</i>
Colorectal Cancer.....	102
<i>TABLE 12 GLOBAL PHASE III PIPELINE FOR COLORECTAL CANCER, THROUGH 2016.....</i>	<i>102</i>
Head and Neck Cancer.....	102
<i>TABLE 13 GLOBAL PHASE III PIPELINE FOR HEAD AND NECK CANCER, THROUGH 2016.....</i>	<i>103</i>
Kidney Cancer .....	103
<i>TABLE 14 GLOBAL PHASE III PIPELINE FOR KIDNEY CANCER, THROUGH 2016.....</i>	<i>104</i>
Leukemia .....	104
<i>TABLE 15 GLOBAL PHASE III PIPELINE FOR LEUKEMIA, THROUGH 2016.....</i>	<i>105</i>
<i>TABLE 15 (CONTINUED).....</i>	<i>106</i>
Liver Cancer .....	106
<i>TABLE 16 GLOBAL PHASE III PIPELINE FOR LIVER CANCER THROUGH 2016.....</i>	<i>106</i>
<i>TABLE 16 (CONTINUED).....</i>	<i>107</i>
Lung Cancer.....	107
<i>TABLE 17 GLOBAL PHASE III PIPELINE FOR LUNG CANCER THROUGH 2016.....</i>	<i>107</i>

<i>TABLE 17 (CONTINUED)</i> .....	108
Lymphoma .....	108
<i>TABLE 18 GLOBAL PHASE III PIPELINE FOR LYMPHOMA, THROUGH 2016</i> .....	109
<i>TABLE 18 (CONTINUED)</i> .....	110
Multiple Myeloma.....	110
<i>TABLE 19 GLOBAL PHASE III PIPELINE FOR MULTIPLE MYELOMA, THROUGH 2016</i> .....	110
Ovarian Cancer.....	111
<i>TABLE 20 GLOBAL PHASE III PIPELINE FOR OVARIAN CANCER, THROUGH 2016</i> .....	111
Pancreatic Cancer.....	111
<i>TABLE 21 GLOBAL PHASE III PIPELINE FOR PANCREATIC CANCER, THROUGH 2016</i> .....	112
Prostate Cancer .....	112
<i>TABLE 22 GLOBAL PHASE III PIPELINE FOR PROSTATE CANCER, THROUGH 2016</i> .....	113
<i>TABLE 22 (CONTINUED)</i> .....	114
Sarcoma.....	114
<i>TABLE 23 GLOBAL PHASE III PIPELINE FOR SARCOMA, THROUGH 2016</i> .....	114
Skin Cancer.....	115
<i>TABLE 24 GLOBAL PHASE III PIPELINE FOR SKIN CANCER, THROUGH 2016</i> .....	115
Solid Tumors.....	116
<i>TABLE 25 GLOBAL PHASE III PIPELINE FOR SOLID TUMORS, THROUGH 2016</i> .....	116
Stomach Cancer.....	116
<i>TABLE 26 GLOBAL PHASE III PIPELINE FOR STOMACH CANCER, THROUGH 2016</i> .....	116
CHAPTER FIVE: COMPANY PROFILES .....	117
ABBOTT LABORATORIES.....	117
AFFIRIS AG .....	117
AKER BIOMARINE ASA .....	118
ALGENICS.....	119
APHIOS CORP.....	120
APP PHARMACEUTICALS .....	121
ARCTICZYMES .....	122
ASKA PHARMACEUTICAL CO., LTD. ....	123
ASTELLAS (AGENSYS, INC.).....	124
ASTELLAS (AGENSYS, INC.) (CONTINUED) .....	125
AQUAPHARM BIODISCOVERY, LTD. ....	126
AZUR PHARMA.....	126
BASF SE.....	127

BAYER INNOVATION.....	128
BEDFORD LABORATORIES .....	129
BIOSYN CORP.....	130
BIOVEST INTERNATIONAL, INC.....	130
BTG INTERNATIONAL, LTD. ....	131
CATABASIS PHARMACEUTICALS, INC.....	132
CELLEX THERAPEUTICS .....	132
CENTOCOR ORTHO BIOTECH .....	133
COGNETIX, INC. ....	133
COMENTIS .....	134
CYANOTECH CORP. ....	134
EISAI CO., LTD. ....	135
ELAN CORP. (ELAN PHARMACEUTICALS, INC.).....	136
EUROPHARMA, INC. ....	136
GENZYME .....	137
GILEAD SCIENCES, INC.....	138
GLAXOSMITHKLINE.....	138
GLYCOMAR, LTD. ....	139
<i>TABLE 27 GLYCOMAR POLYSACCHARIDE CHARACTERIZATION</i>	
<i>SERVICES .....</i>	<i>140</i>
<i>TABLE 27 (CONTINUED).....</i>	<i>141</i>
GILEAD SCIENCES.....	141
HOSPIRA, INC. ....	142
IMMUNOPHOTONICS .....	142
INTEGRIN ADVANCED BIOSYSTEMS.....	143
INTERMED DISCOVERY GMBH.....	143
INTRACEL.....	144
KLINIPHARM GMBH.....	144
KLINIPHARM GMBH (CONTINUED) .....	145
MAGELLAN BIOSCIENCE GROUP, INC.....	146
MARINE POLYMER TECHNOLOGIES, INC.....	147
MARINOVA PTY, LTD.....	147
MARINOVA PTY, LTD. (CONTINUED) .....	148
MARTEK BIOSCIENCES CORP.....	149
MEDIMETRIKS PHARMACEUTICALS.....	149
MERA PHARMACEUTICALS .....	150
MILLENNIUM, A TAKEDA ONCOLOGY CO.....	151
NAUTILUS BIOSCIENCES CANADA, INC.....	151
NÉOVACS .....	152
NEUROBIOPHARM, INC. (PART OF NEPTUNE TECHNOLOGIES) .....	153
NEREUS PHARMACEUTICALS .....	154
NEREUS PHARMACEUTICALS (CONTINUED) .....	155
OHR PHARMACEUTICALS.....	156
PACIRA PHARMACEUTICALS, INC. ....	156



PHARMAMAR .....	157
PHARMAMAR (CONTINUED) .....	158
PHARMA MARINE USA, LLC .....	159
PHYCOSOURCE .....	160
PML APPLICATIONS, LTD.....	160
PRIMEX EHF.....	161
PROLUME, LTD.....	161
PRONOVA BIOPHARMA ASA .....	162
SEA RUN HOLDINGS .....	163
SEATTLE GENETICS, INC.....	164
SEATTLE GENETICS, INC. (CONTINUED) .....	165
SIGMA-TAU PHARMACEUTICALS, INC.....	166
STELLAR BIOTECHNOLOGIES .....	166
STELLAR BIOTECHNOLOGIES (CONTINUED).....	167
STELLAR BIOTECHNOLOGIES (CONTINUED).....	168
STRATEGRO INTERNATIONAL, LLC .....	169
TAIHO PHARMACEUTICALS .....	169
TEQUESTA BIOVENTURES .....	170
TRITON BIOPHARMA.....	170
TRIOUS THERAPEUTICS .....	171
VERONA PHARMA, PLC.....	172
XENOME, LTD. ....	172
YAKULT HONSHA CO, LTD. ....	173
ZELTIA GROUP (GRUPO ZELTIA) .....	173
ZELTIA GROUP (GRUPO ZELTIA) (CONTINUED).....	174
ZELTIA GROUP (GRUPO ZELTIA) (CONTINUED).....	175
APPENDIX: RESOURCES .....	176
<i>TABLE 28 MARINE RESEARCH RESOURCES BY CATEGORY.....</i>	<i>176</i>
<i>TABLE 28 (CONTINUED).....</i>	<i>177</i>
<i>TABLE 28 (CONTINUED).....</i>	<i>178</i>
<i>TABLE 29 KEY RESEARCHERS/LEADERS AFFECTING MARINE-</i>	
<i>DERIVED DRUG INDUSTRY .....</i>	<i>178</i>
<i>TABLE 29 (CONTINUED).....</i>	<i>179</i>