

**Summer Training at
MSN Lab. Pvt. Ltd.,
Hyderabad**

**Study on Preferences of Nutritional Supplements in Managing
Osteoarthritis Among Orthopaedic Doctors in Hyderabad**

**By
Amit Vyas**

**Under the guidance of
Dr. Sandeep Narula**

**MBA Pharmaceutical Management
2015-2017**



**The IIHMR University, Jaipur
2016**

CERTIFICATE

TO WHOM SO EVER IT MAY CONCERN

This is to certify that **Amit Vyas** student of **MBA Pharmaceutical Management** from the IIHMR University; Jaipur has undergone summer training at **MSN Laboratories Pvt. Ltd., Hyderabad** from 1st April to 31st May, 2016.

The candidate has successfully carried out the study designated to him during summer training and his approach to the study has been sincere, scientific & analytical.

The internship is in fulfilment of the course requirements.

I wish him all success in all his future endeavours.

Col. (Dr.) Ashok Kaushik
Dean (Academics & Student Affairs)
IIHMR University, Jaipur

Dr. Sandeep Narula
Associate Professor
IIHMR University, Jaipur



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July 27, 2016

TO WHOMSOEVER IT MAY CONCERN

This is to certify that **Mr Amit Vyas**, S/o Ranesh Kumar Vyas bearing Registration No: 0056 from IIHMR University, Jaipur has successfully completed his project work in our Formulation Marketing Department on "A Study on Preferences of Nutritional Supplements in Managing Osteoarthritis Among Orthopedic Doctors in Hyderabad" at MSN Laboratories Pvt. Ltd under the guidance of **Mrs M Kiranmayi**, Marketing Manager from 1st April, 2016 to 31st May, 2016.

During Project work **Mr Amit Vyas** performance was found satisfactory.

for MSN Laboratories Pvt. Ltd


P Narsimha Rao
Senior Vice President - Group HR



DECLARATION

*I am a student of MBA Pharmaceutical management, Institute Of Health Management and Research Jaipur, declare that the project titled “A study on **A STUDY ON PREFERENCES OF NUTRITIONAL SUPPLEMENTS IN MANAGING OSTEOARTHRITIS AMONG ORTHOPEDIC DOCTORS IN HYDERABAD**” is written and Submitted by me in partial fulfillment of the degree of master of business administration in Pharmaceuticals in the Institute of health management of research, Jaipur University, Rajasthan is my Original work and has not been submitted elsewhere previously in partial or full of the award of any degree in any University.*

Amit Vyas

Acknowledgement:

The Summer Training opportunity I had with “MSN Laboratory Pvt. Ltd.”, as a part of MBA Pharmaceutical Management program was a great chance for learning and professional development. Therefore, I consider myself as a very lucky individual as I was provided with an opportunity to be a part of it. I am also grateful for having a chance to meet so many wonderful people and professionals who led me through this internship period.

Bearing in mind previous I am using this opportunity to express my deepest gratitude and special thanks to my Guide “**Mrs. M. Kiranmayi**” (Marketing manager) who in spite of being extraordinarily busy with his duties, took time out to hear, guide and keep me on the correct path and allowing me to carry out my Training with ease and within extended duration of whole two month of Internship Training. I extend my thanks to **Mr. Vishal Arora**, (SBU Head Domestic form) MSN Lab. Pvt. Ltd and **Mr. P. Srinivas**, (senior manager H.R.) for facilitating this training.

I express my deepest thanks to Training coordinator **Mr. Rahul Sharma** (Assistant Professor) **IHMR** University, Jaipur for taking part in useful decision & giving necessary advices and guidance on how to incept and commence the Summer Training. I choose this moment to acknowledge their contribution gratefully.

Last but not the least I would like to praise and thanks Almighty God for his shower of blessings throughout my Internship, hence I could work with full integrity and Zest.

I perceive as this opportunity as a big milestone in my career development. I will strive to use gained skills and knowledge in the best possible way, and I will continue to work on their improvement, in order to attain desired career objectives. Hope to continue cooperation with all of you in the future.

Thanks, Sincerely,

Amit Vyas

MBA Pharmaceutical Management

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Chapter-I

INTRODUCTION

COMPANY PROFILE:

MSN Group is one of the fastest growing manufacturers of Active Pharmaceutical Ingredients (APIs) and finished dosages in India. Established in the year 2003, MSN Group comprises of eight API manufacturing plants (including one for Oncology), three finished dosage facility (including one for Oncology) and a dedicated R&D Center. Our plants are ISO 9001-2000 certified, WHO: GMP, EU:GMP and USFDA approved. Our manufacturing units are designed to confirm to the principles of Quality, Safety and sound Environment.

MSN Group management team comprises of top notch professionals, with extensive experience in synthetic chemistry, process engineering, quality, IT, SCM, marketing, regulatory requirements and environmental safety and a proven track record in pharmaceutical industry. Our outstanding teams of well-educated, motivated and result-oriented employees have contributed actively to our spectacular growth.

Thriving on the platform of innovation and excellence, we have grown into a successful and profitable enterprise with a portfolio covering all the major therapeutic areas.

MSN Groups efficient and well-knit global sales and marketing team of professionals assimilate market trends effectively & market our products in all the major pharmaceutical markets globally. Their professional knowledge and attitude combined with common sense and business acumen have played a pivotal role in surging our sales and revenues.

MSN Group seeks to explore and develop more strategic areas to diligently pursue new opportunities and effectively transmit ethically consistent and truthful image of our products.

Expand our network of reliable intellectual partners

Actively file DMFs & Dossiers/ANDAs

Constantly evaluate our Regulatory compliance

Obtain all the possible regulatory approvals

Continuously invest and build our intellectual property

Our Vision

We would like to be the preferred supplier of quality Pharmaceuticals to global markets complying to international regulatory requirements and aim for the highest possible customer satisfaction.

Our Mission

To discover, develop, manufacture, market safe and innovative pharmaceuticals for better health and improved quality of life. To be a true world class, reliable pharmaceutical company and manufacture pharmaceuticals that effectively and safely alleviate, treat and prevent diseases Instill greater team spirit and generate motivation and pride.

Features

Fully equipped manufacturing blocks with attached clean air systems

More than 400 SS/GL/HP reactors ranging from 504000

Dedicated pilot plants (with clean air systems) for scaleup studies

Process R&D team at each plant

Cryogenic facilities (80 to 250 degree C)

Purified water distribution loop confirming to USP In house Micronization capabilities

Clean rooms at every block

Dedicated Microbiology Labs

Wide range of analytical equipment including GCs, HPLCs with PDA, UV spectrometers, IR, PSD, DSC & XRD

Abosulte compliance with Safety, Health & Environment

Research & Development

(R&D) forms the very basis of MSN. It is the wind beneath our wings. The aim of R&D at MSN is to work on solutions that offer a hope for a better tomorrow. With an outstanding workforce, cutting-edge science, state-of-the-art technology base and knowledge intensive initiatives, we are working on innovative solutions for tomorrow`s healthcare problems.

Innovation & Speed form the core of our strategy. At MSN we mix more than reactants, we mix Innovation, Speed & Trust to create value for the customer.

Regulatory Approvals

USFDA

PIC/S

WHO: GMP

EUGMP

Hamburg, Germany

ISO 9001: 2008

DSIR Recognition

Korean FDA

Cofepris

Department of Science & Technology, Govt. of India

Department of Scientific and Industrial Research, Govt. of India

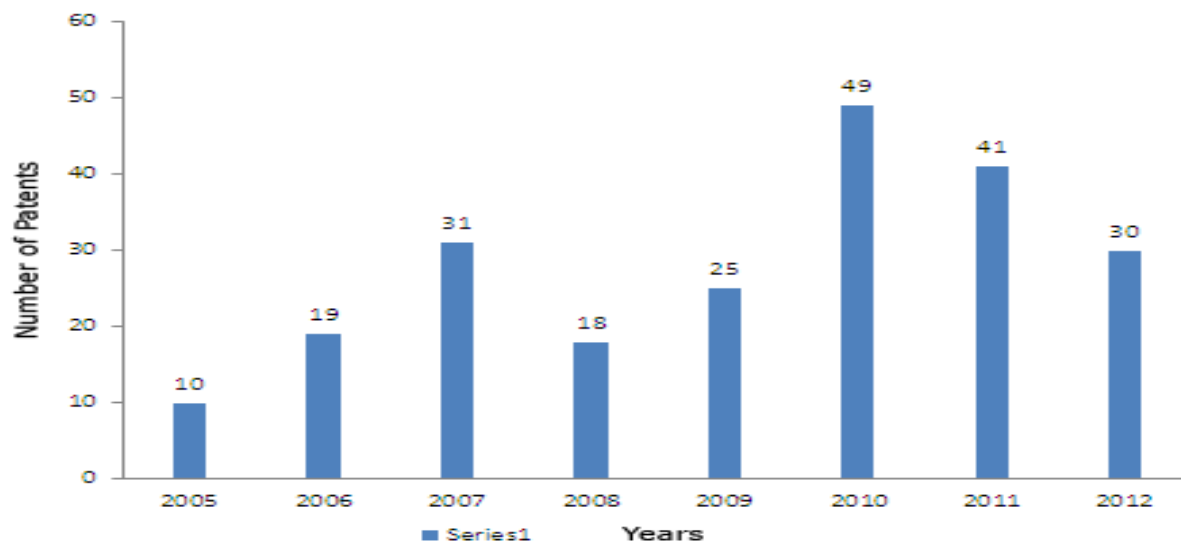
Infrastructure

The MSN R&D Center is **750,000** sq.ft. facility housing **42** labs & **600** scientists. It is absolutely a green facility equipped with state-of-the-art data security systems. The setting is designed to be as natural as possible ideal for research activity.

Patents

Of the 100+ products we have worked so far, we have filed more than 188 patents for them.

55PCTs filed 45published 137Indian Patents filed 82published.



Financial

In a short span of 8 years, we have recorded 100% growth in multiple years from USD 22 million in 2005 to USD 130 million in 2011.

Filings

120 US / EU / CEP / Korean / Canadian / Japanese DMFs

1500 dossiers

10^{1st} in India

Generics

188 Indian & International Patent

Recognitions / Awards

MSN Laboratories Wins Pharmaexcil's Patent Award 2015

MSN Laboratories has been awarded TV5 Business Leader award 2015 in the Pharmaceutical (Medium Scale) category.

MSN Laboratories Limited has been awarded CPhI India Award 2012 for "Innovation in Cost". It recognizes our contribution

(1st in India)

Nominated as the Best Company in an Emerging Markets by Scrip Awards 2011

PHARMEXCIL (Pharmaceutical Export Promotion Council) Outstanding Export Performer Award, 2009 & 2010.

INTRODUCTION:

Collagen peptides are short chain amino acids and most abundant protein in the body. it is composed of the individual amino acids Glycine, Proline, Hydroxyproline and Arginine. In nature found exclusively in animal tissue especially bone and connective tissue. It is what is responsible for giving skin elasticity, hair its strength and connective tissue its ability to hold everything in place.

Collagen occurs in many places throughout the body. Over 90% of the collagen in the human body, however, is type I. Collagen protein makes 30% of the total protein in the body and 70% of the protein of the skin. So far, 28 types of collagen have been identified and described. They can be divided into several groups according to the structure they form.

Types of collagen peptide:

1. Fibrillar (Type I, II, III, V, XI)
2. FACIT (Fibril Associated Collagens with Interrupted Triple Helices)
3. Short chain
4. Basement membrane
5. Multiplexing (Multiple Triple Helix domains with Interruptions)
6. MACIT (Membrane Associated Collagens with Interrupted Triple Helices)

Most common type: The five most common types are:

Type I: Skin, Tendon, Vascular ligature, organs, Bone (main component of the organic part of bone)

Type II: Cartilage (main Collagenous component of cartilage)

Type III: Reticulate (main component of reticular fibers), commonly found alongside type I.

Type IV: forms Basal Lamina,

Type V: Cell surfaces, Hair and Placenta.

Literature Review:

Proteoglycans in O.A Patients, improving the quality of their joint tissue.

- resist cartilage protein digesting enzymes
- Reprogram destructive chondrocytes to lessen inflammation.
- protects surface of cartilage from oxidative damage(free radicals)
- Powerful anti inflammatory modulator.
- Well tolerated better safety profile for long-term use.
- Collagen Type-II is more effective than Glucosamine and chondroitin combination in O.A & R.A and good scores in WOMAC,VAS & QOL

Hydrolyzed collagen peptide:

Hydrolyzed collagen peptide is Very effective in treating O.A and Rheumatoid arthritis.

Major focus on bone metabolism by inducing maturation of osteoblast and prevention of bone resorption and osteopenia, increasing bone solidity. It reduces pain in joints. Collagen peptides along with popular nutraceuticals used for prophylaxis of osteoarthritis (OA). Type II collagen is the basis for articular cartilage and hyaline cartilage. It makes up 50% of all protein in cartilage and 85-90% of collagen of articular cartilage. It is very effective in treating O.A and Rheumatoid arthritis. and Works in the root cause of the O.A & R.A , provides long lasting effect Cartilage destruction is mediated by the loss of collagen type II and proteoglycans in O.A. it Reduces the moderate to severe knee pain from OA enhances the synthesis of HA and cartilage. Proteoglycans in O.A patients, improving the quality of their joint tissue.

- resist cartilage protein digesting enzymes
- Reprogram destructive chondrocytes to lessen inflammation.
- protects surface of cartilage from oxidative damage(free radicals)

- Powerful anti inflammatory modulator.
- Well tolerated better safety profile for long-term use.
- Collagen Type-II is more effective than Glucosamine and chondriotin combination in O.A & R.A and good scores in WOMAC,VAS & QOL

Objective:

1. To conduct market assessment of collagen peptide in Hyderabad.
2. To find the market potential of collagen peptide.
3. To find the price range of collagen peptide in sachet and tablet/capsule form.
4. To find the leading market player in collagen peptide.
5. To find out nutritional supplement used to treat osteoarthritis.

Section-2

MODE OF DATA COLLECTION

MATERIAL AND TOOLS:

Data type: Primary data

Data will be collected through designed **structured questionnaire** and reactions will be made by chemists and orthopedic doctors only after reading questionnaire.

There are nine questions in the chemist questionnaire and six questions in the chemist questionnaire. The questions are based on the sales of the various drugs in their retail pharmacy store and the drugs prescribed by physician. For data collection each pharmacy shop was selected as per the area where, maximum pharmacy shops and orthopedic doctors are available.

Data collection tool:

Data will be collected through questionnaire and responses will be compiled in the Excel sheet.

Ethical consideration:

Before collecting the primary data and responses from Pharmacists and doctors informed agreement/Consent is taken from the respondents and the proposed informal agreement is provided by IIHMR University for conducting summer internship training as a part of academia of MBA Pharmaceutical Management programmed.

DATA MANAGEMENT AND ANALYSIS:

Data Collection:

Primary data (through structured Questionnaire as attested in Annexure), as suggested earlier was collected by contacting the Pharmacists and doctors response as per convenience and availability in Hyderabad. Total ten days were made to bring the desired sample size of pharmacy shop. Following table shows the ten days of data collection:

Sr. No.	Day	Area	Respondents
1	1 st	Apollo hospital, Film Nagar	7
2	2 rd day	Jubli hills	9

3	3 th day	NIMS Hospital, Yashodha hospital	5
4	4 th day	Care hospital	7
5	5 th day	K.P.H.B	5
6	6 nd day	Balanagar	4
7	7 th day	Miyapur	5
8	8 th day	Vidya Nagar	7
9	9 th day	Sunshine Hospital	3
10	10 th day	Banjara Hills	5

So total 57 pharmacists responded the questionnaire.

METHODOLOGY:

- **Study Design:** Descriptive.
- **Primary data** was collected from the chemist shop and orthopedic doctors in Hyderabad.
- **Secondary data:** web was used.
- **Structured questionnaires:** was used to collect the information from private pharmacy shops and orthopedic doctors.
- **Total respondents:** Chemist: 60
Doctors: 60
- **Study area:** Hyderabad, India.
- **Sampling: Convenience Sampling**

SECTION-3
DATA COMPILATION,
ANALYSIS &
INTERPRETATION

NEED FOR THE STUDY:

As the sales of the osteoarthritis drugs increased day by day we are need to assess the market of osteoarthritis drugs. By this study we will be able to know about potential of osteoarthritis drugs in the market. So this study can be use to know the market of osteoarthritis drugs. Need of this study is as follow.

- a. We know about the different price range osteoarthritis drugs in the market.
- b. To know about which branded and generic drugs has more sales.
- c. To know how many patient of osteoarthritis disease received per day.
- d. To know which is emerging new molecule or compound in the market of osteoarthritis drugs.
- e. To know about which nutritional supplement is used for management of osteoarthritis.
- f. To know about the therapies used to management of osteoarthritis.

Goal:

Examine the market of various collagen peptide and therapies and nutritional Supplement used in the management of osteoarthritis.

Data entry:

Primary data collected through the survey forms, where organized and assigned the individual forms with the specific numerical number from 1 to 60. This makes easier for segregating data and allotting specific form its individual identity. The questionnaire is develop as first some options are given in the questions and also the others option is also given so which response are not included in the options will be write in others option.

For Example

1. In your clinical practice what is the percentage of arthritis patient you treat daily?

A) 20-30 % B) 30-40 % C) 50 % D) > 50 %

After collecting the data total responses of each options of each question were counted. These responses are compared with total responses which are 60, and then % were calculated of each responses of Question to the total response 60.

Drug	WOMAC scores 90 days- stiffness and difficulty in physical function	VAS Scores 90 days General level of pain	During treatment- Effect of pain on daily activities
Type 2 collagen	33	40	20
Glucosamine +chondroitin	14	15.4	6

Source: International journal of medical sciences, 2009, volume 6, pages 312-321

Pricing Strategy- Market products (Tablets & Capsule)

Drug	Company	M.R.P.	Drug Type
Jointace C2	Meyer	198.00	Tablet
Tendowell	Sundyota	219.96	Capsule

Pricing Strategy- Market product (Sachets)

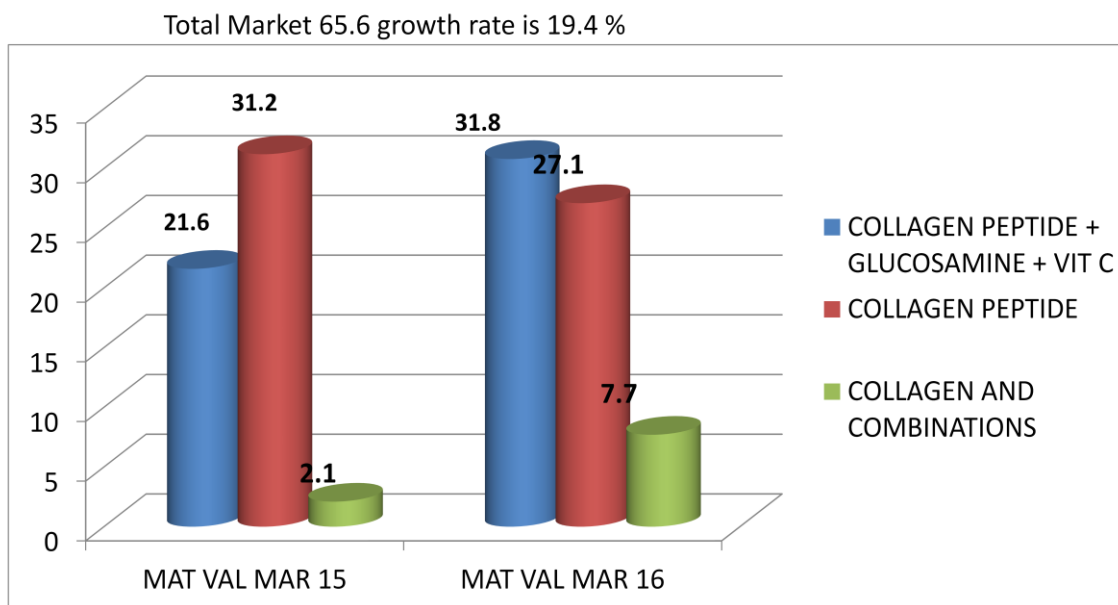
Brand Name	Company	M.R.P	Drug type
Orthoboon	Mankind	60.00	Sachet
Kondroflex	Panacea	71.50	Sachet
Collacee	Pharmed	65.00	Sachet
Collaflex Pro	Sanofi	82.00	Sachet
Jointking	Akumentis	90.00	Sachet
Collabond	Zydus	89.00	sachet

Market Potential- Awacs Mar-16-Pan India

COLLAGEN PEPTIDE Mar-16 AWACS (Values in crs)

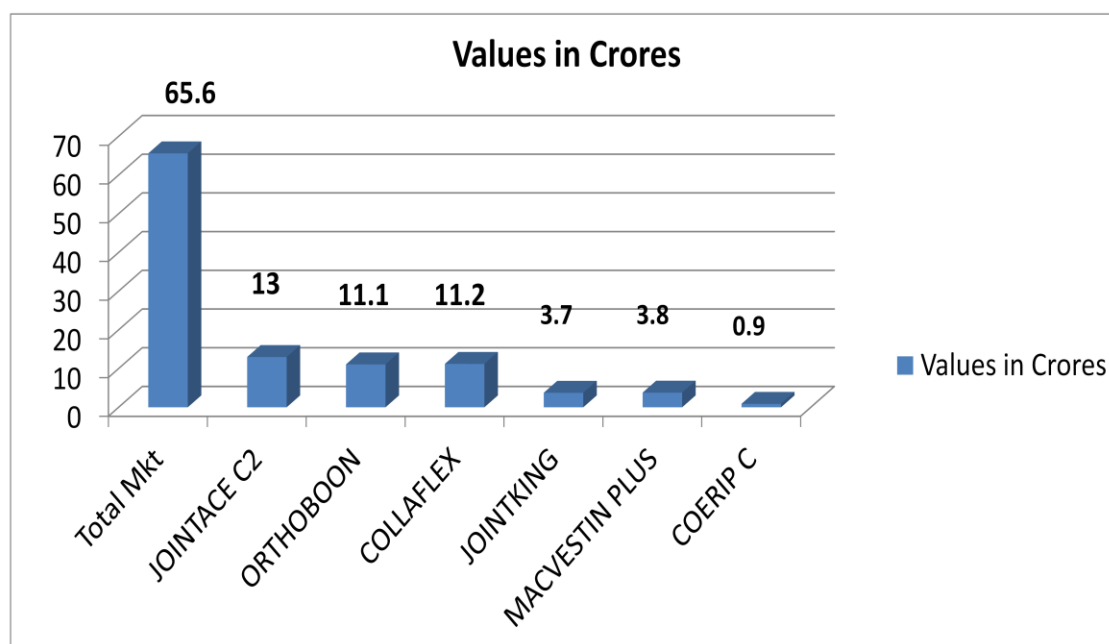
SUBGROUP	BRAND	COMPANY	MAT VAL MAR 16	MAT VAL MAR 15	MAT VAL GR MAR 16
COLLAGEN PEPTIDE M5B15			27.1	31.2	-13.2
COLLAGEN PEPTIDE M5B15	COLLAFLEX	SANOFI	11.2	7.5	49.1
COLLAGEN PEPTIDE M5B15	JOINTKING	AKUMENTIS	3.7	5.6	-33.1
COLLAGEN PEPTIDE M5B15	COLLABOND	ZYDUS CADILA	2.6	4.3	-38.1
COLLAGEN PEPTIDE M5B15	ZEROSTIFF	AKUMENTIS	2.3	5.9	-61.4
COLLAGEN PEPTIDE M5B15	ZEDFIT	TABLETS	2.0	2.4	-17.5

Market Potential-Awacs Mar-16-Pan India



Source: company data

Brand Wise Mkt data

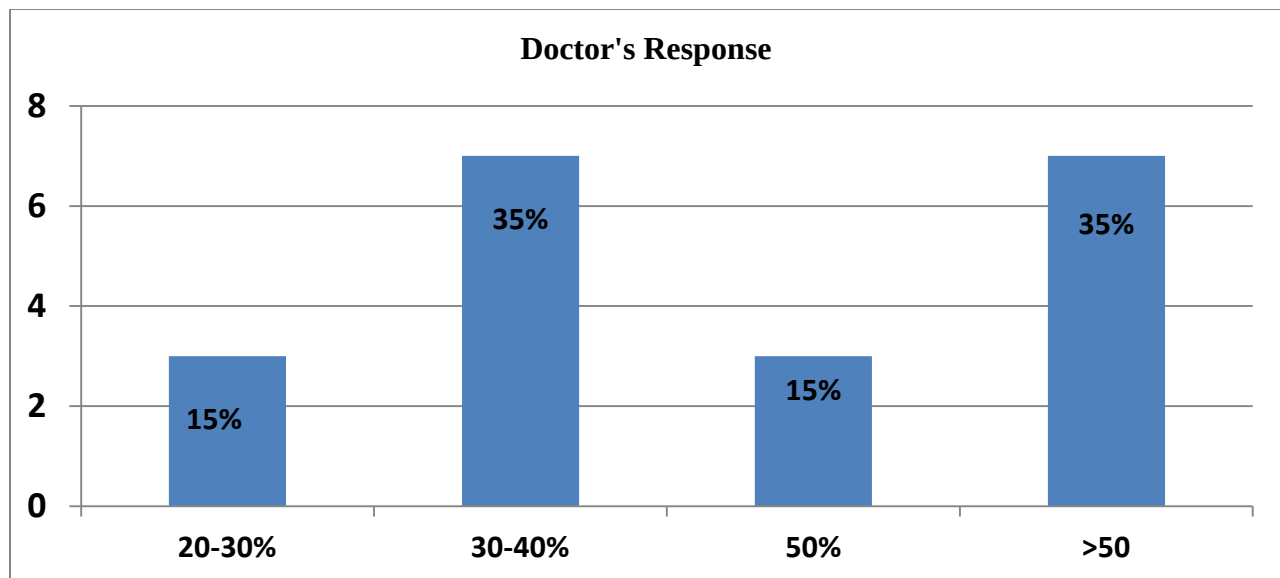


Source: company data

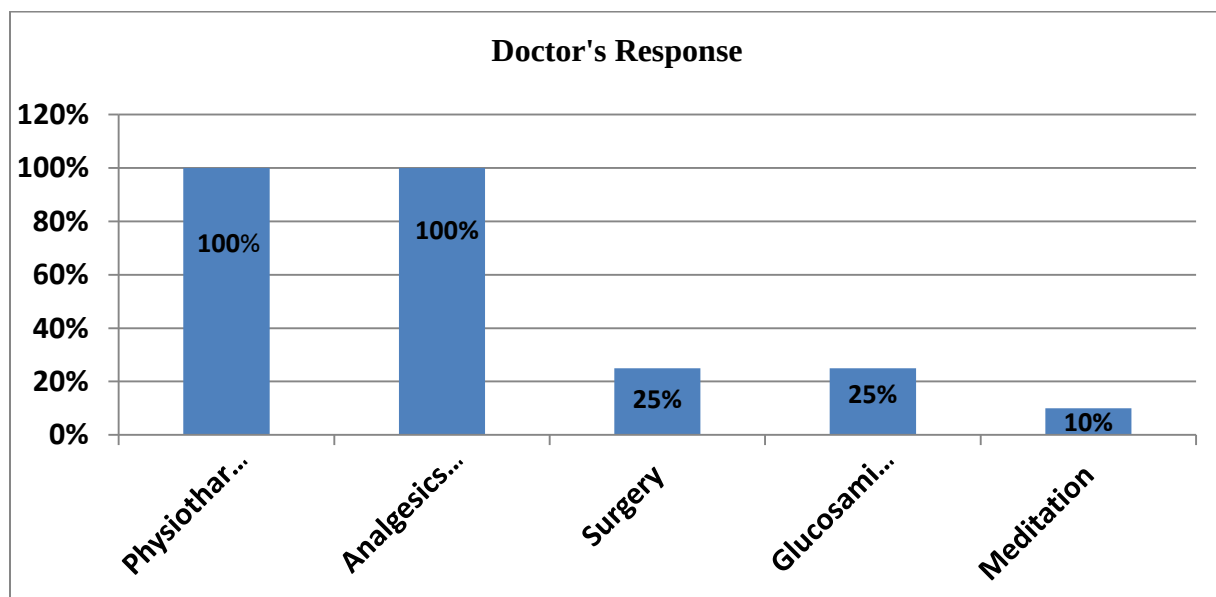
RESULT AND FINDINGS

Percentage of arthritis patient:

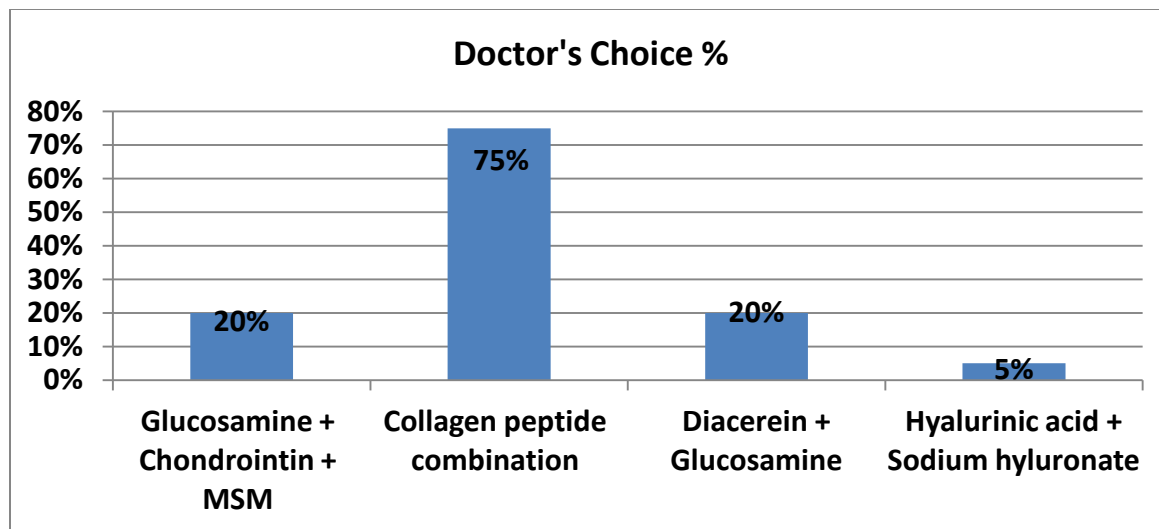
Total Respondents	20-30 %	30-40 %	50 %	>50%
20	03	07	03	07



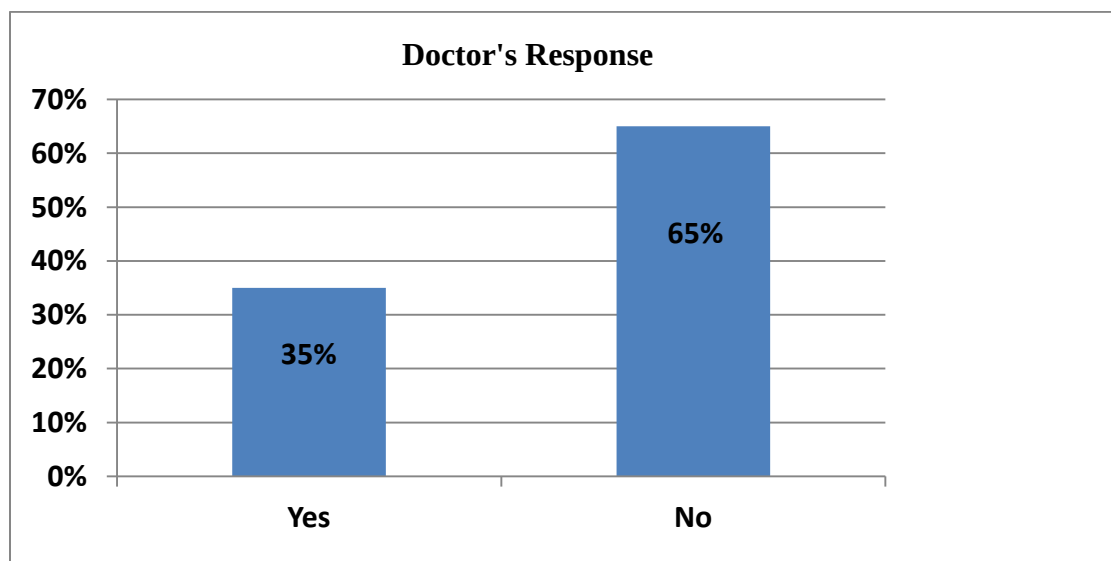
1. Therapies to treat Osteoarthritis



2. Preferred choice of nutritional supplement

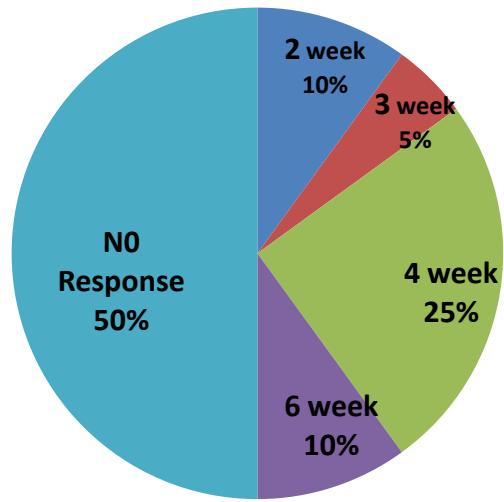


3. (UC-II) as a better Alternative or not in the management of Osteoarthritis

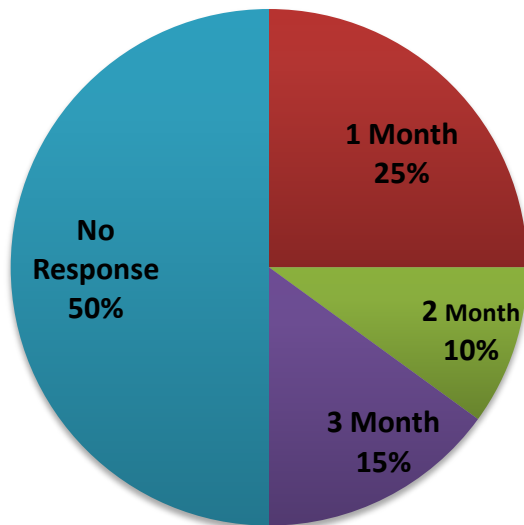


4. Mean period taken by UC-II to relief

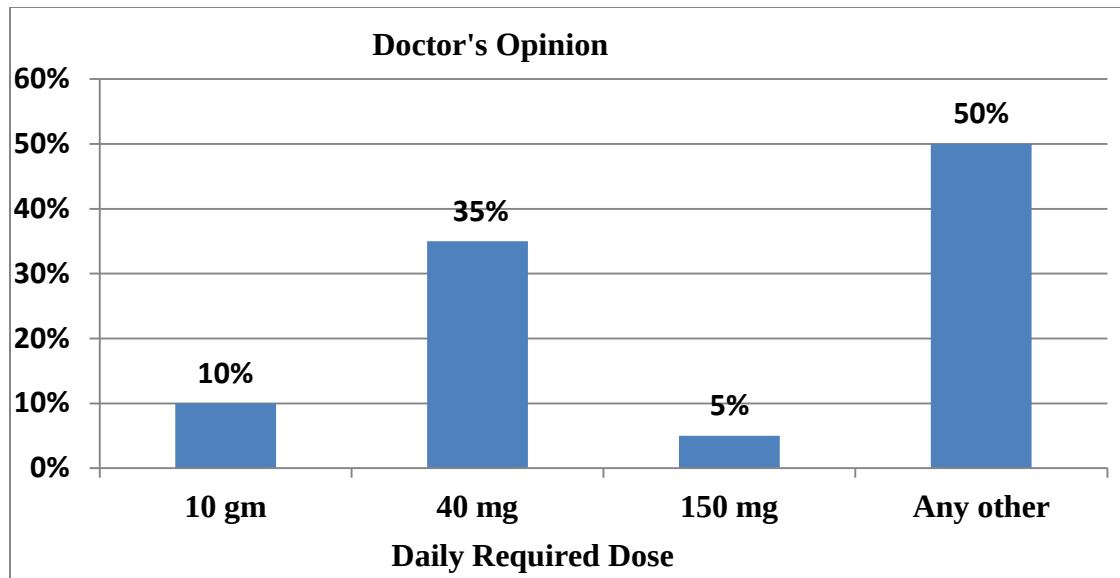
Doctor's response on Pain



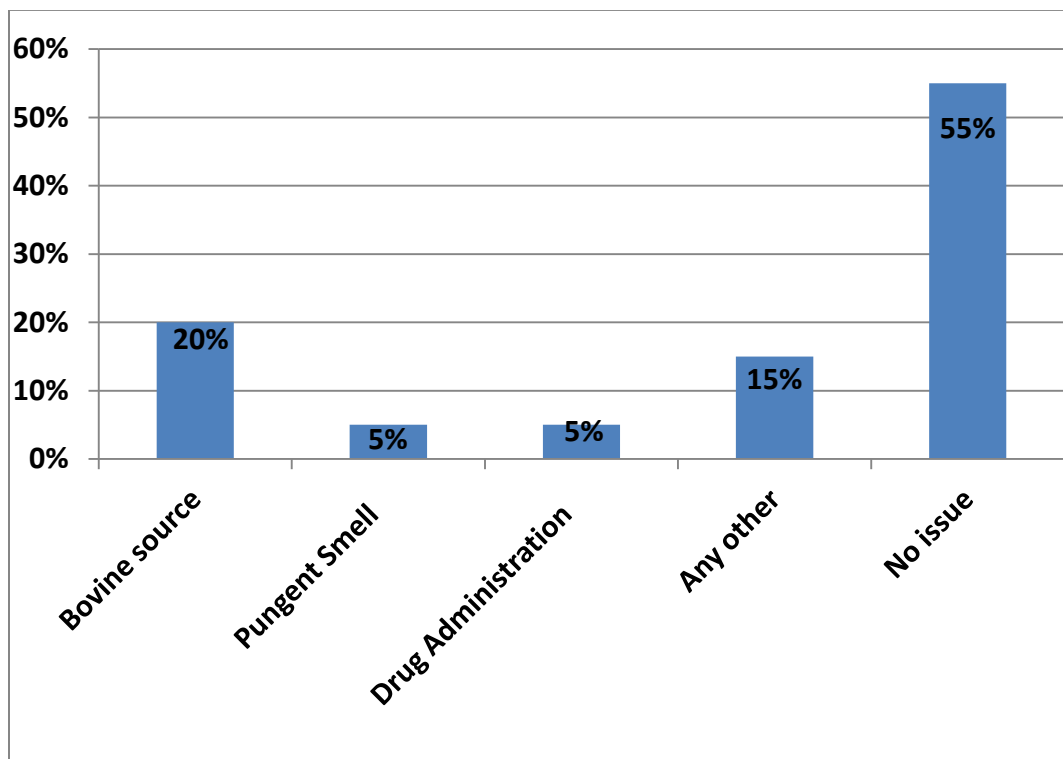
Doctor's Response on Stiffness & Mobility



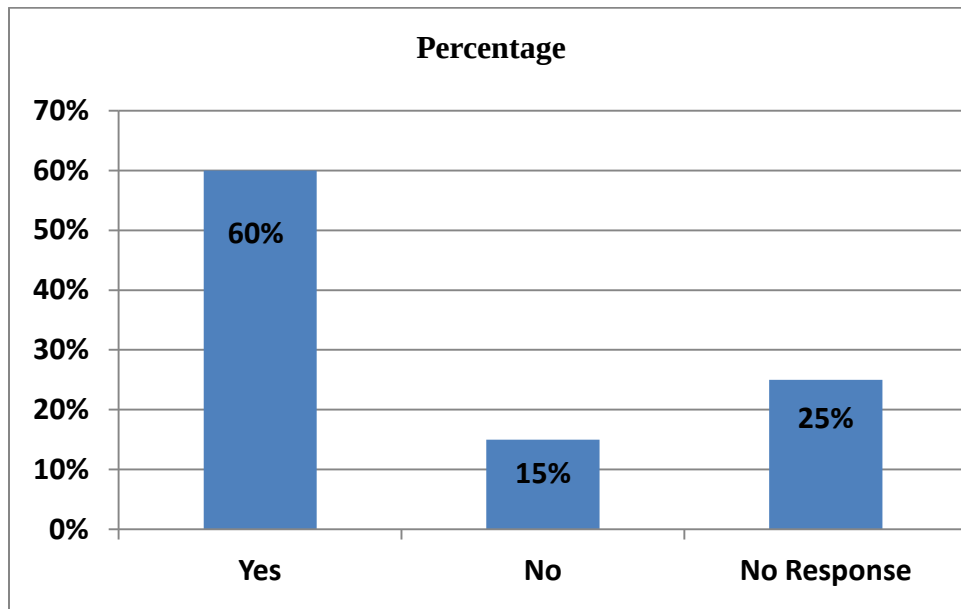
5. Daily required dose of the UC-II



6. Challenges faced during collagen peptide administration by Patient

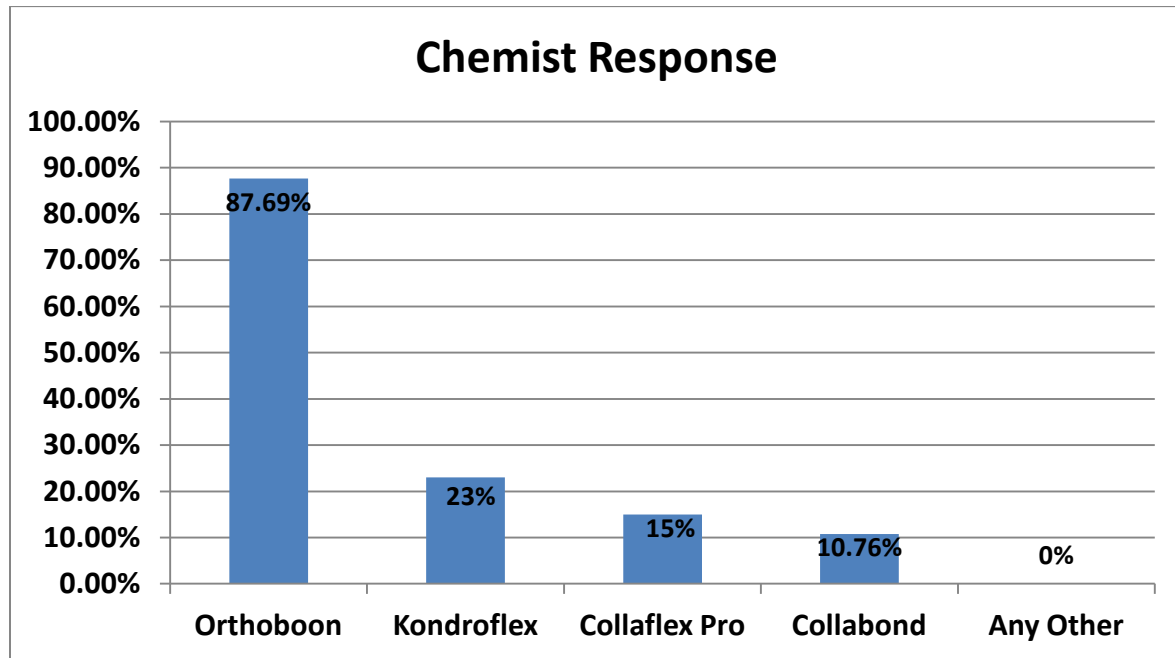


7. Do you recommend collagen peptide Type- II come in capsule form which is palatable and efficacious.

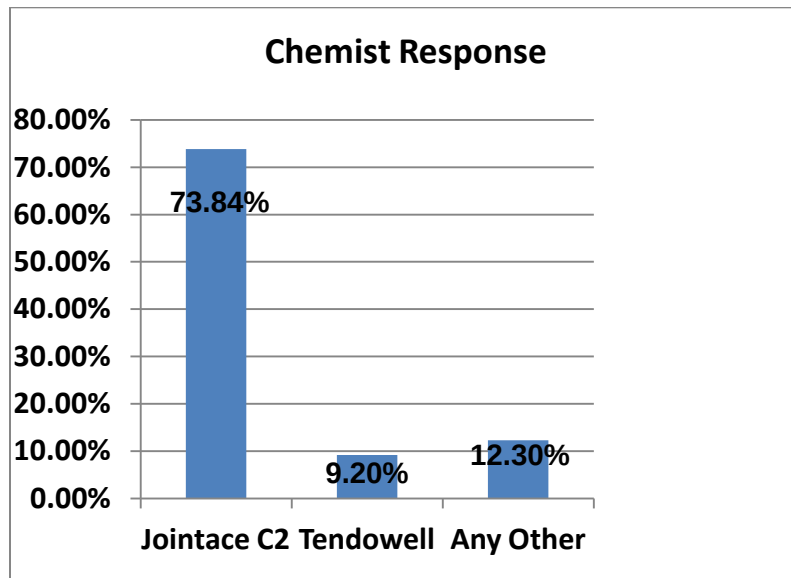


CHEMIST FEEDBACK ANALYSIS

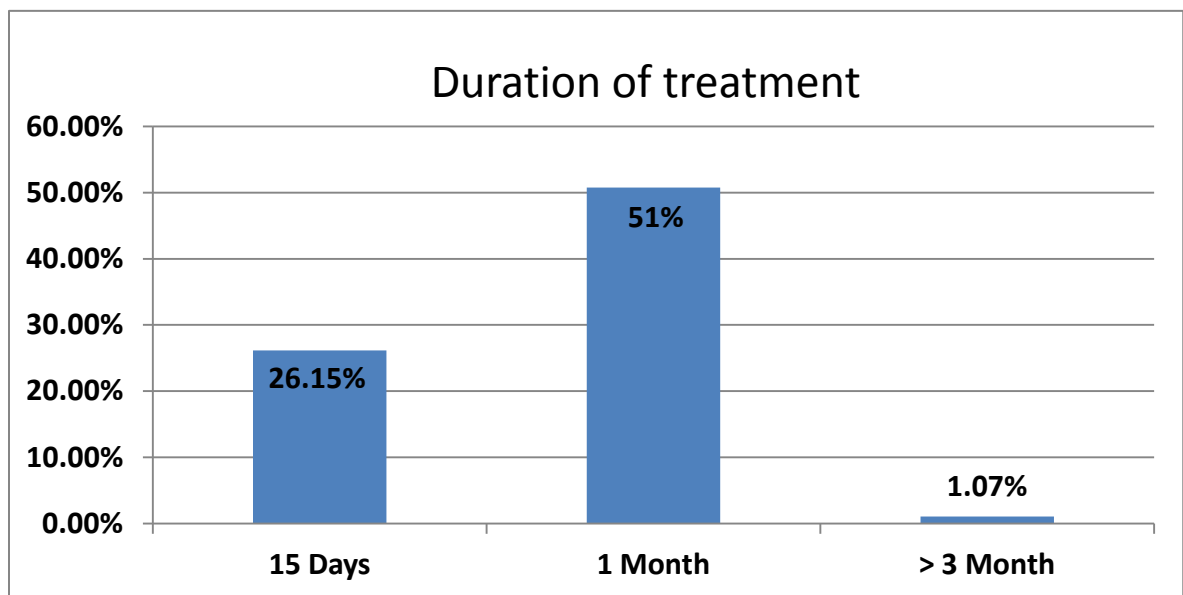
1. Collagen peptide combination brands available



2. Collagen peptide brands available in Tab. / Cap. Form



3. Duration of prescription



Chapter-4

SUMMARY AND SUGGESTIONS

SUMMARY AND SUGGESTIONS

Discussion:

As per the aim and objective of study these find the various results related to collagen peptide Brands and combinations in market and Preferred therapies and Nutritional Supplement to treat Osteoarthritis. Here in Various Collagen peptide Brands drugs are more selling as per the study. Most of the respondents said that JointaceC2 and Orthoboone are most selling drugs as in Osteoarthritis. JointaceC2, Tendowell, Orthoboone, Kondroflex, are the most prescribed brands in Hyderabad by Physician. These drugs are prescribed by physician mostly for One month. Osteoarthritis drugs have the different price range from the 60 Rs. to 90 Rs. for each sachet and 198 Rs to 220 Rs for tablet/capsule per Strip. Glucosamine+chondroitin+MSM combination is the most prescribed. Most of the prescription is received by floating. Collagen peptide Brands are not effective in all patients and. Brands Condro-OD and Condro acute are providing 9+1 free promotional offer.

So Mayer, Panacea, Sanofi, Sundyota, Zydus and Accumentis are the leading market player in the Osteoarthritis drug market.

Observations

1. JointaceC2 is most preferred collagen peptide brands in tablet/capsules form.
2. Orthoboone is most preferred collagen peptide brands in sachet form.
3. JointaceC2 is Market player in osteoarthritis drug market in Hyderabad.
4. Most of the Drugs has price range 60-90 Rs. per sachet and Tablet and capsule 198 -120 Rs.
Per strip.
5. Most of the osteoarthritis drugs are prescribed for one month.
6. Physiotherapy and Glucosamine is the most preferred therapy chosen by doctors.
7. Most of the doctors did not find undenatured collagen peptide type-II as better alternative
In the management of osteoarthritis in pain and stiffness of joint.
8. Combination 'Glucosamine + Chondroitin + MSM' nutritional supplement is mostly used to
Treat osteoarthritis.

Conclusion:

As the doctor sample size is very small and many doctors have not shared the complete information the feedback expressed is very limited hence looking it retail survey and market opportunity and MSN Laboratory strengthen orthopedic segment. 60% of the doctors shared that they welcome new collagen peptide type-II capsule form. So I suggest that company can go ahead with the launch of product.

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11. <https://www.solgar.com/solgarproducts/solgar-no-7> vegetable Capsules.htm

Annexure

Questionnaire on collagen peptide and combinations

Name of doctors:

Qualification:

Address:

Date:

1. In your clinical practice what is the percentage of arthritis patient you treat daily?
A) 20-30 % B) 30-40 % C) 50 % D) > 50 %
2. What is your preferred Therapies to treat Osteoarthritis? Please mention.
A) B) C)
3. What is your preferred choice for Osteoarthritis?
A) Glucosamine +Chondroitin+MSM B) Collagen peptide combination
C) Diacerein+Glucosamine D) Hyalurinic acid+MSM
4. Do you find undenatured collagen Peptide Type-II (UC-II) As a better Alternative in the management of osteoarthritis over conventional therapies?
A) Yes B) No
5. What is the mean period taken by UC-II to achieve satisfactory result in the following Parameters?
Pain Stiffness & Mobility of the Joint
6. As per your Opinion what is the Daily required dose of the collagen Type –II peptide?
A) 10 gm B) 40 mg C) 150 mg D) Any Other
7. What are the common challenges faced during collagen peptide administration by Patient?
A) Bovine source B) Pungent Smell C) Drug Administration D) Any other
8. Do you recommend collagen peptide Type- II come in capsule form which is palatable and efficacious?
A) Yes B) No

9. Please provide your overall feedback about usage of UC-II in treating arthritis of various types?

.....

Chemist Questionnaire

Name of chemist

Date

Address

Contact No.

1. What are the collagen peptide combination brands available with you in sachet form?

A. Orthoboone B. Freejlon C. Jointace D. All the above

2. What are the collagen peptide brands available in Tab./ Cap. form?

A. Jointace C2 B. Kondowell C. Any other

3. Who are the Doctors prescribing these brands more in this area?

A. B. C.

4. What is the duration they prescribe?

A. 15 Days B. 1 month C. > 3 month

5. What is the MRP of these Brands?

A. Orthoboone..... B. Freejlon

C. Jointace D. JointaceC2..... E. Kondowell.....

6. Is there any brand you are getting Offers? If yes what are the brand and how much?

1) Brand name%

2) Brand name%

3) Brand name%