

MARKET ANALYSIS OF DIALYSIS EQUIPMENTS AND CONSUMABLE IN KARNATAKA

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Abstract :

Fresenius medical care is German based company started in the year 1996 (Bad Homburg, Germany) specializing in the production of medical supplies, primarily to facilitate or aid renal dialysis. It is owned by health care company Fresenius. This was formed from the merger of Fresenius World Wide Dialysis, then a division of Fresenius SE, and American company National Medical Care Fresenius Medical Care entered into Indian market in the year 1998 with its corporate office situated at New Delhi, and regional offices situated at Mumbai, Kolkata and Chennai, to operate in respective regions such as East, West, & South.

Purpose: Fresenius **Medical Care** is leading company in the world of health care industry which manufactures the dialysis machines dialyzers and disposals. Since a decade the company is trying to capture the Indian market. Currently the company is achieving its target and it is looking forward to increase its market share. To be in the competition organization thought to conduct a research to find its market share and also to know about its competitors with respect to all the products including dialysis machines (RO plant, Concentrates, Disposables).

Research Objectives:

- ❖ To find out the market share; the total dialysis centers operating in the region.
- ❖ To analyze the competitors in renal care sector.
 - ♦ To find out potential customer market in Karnataka Region.
 - ♦ To know the markets of CRRT machines in Region.

Research Methodology

Sl	Item	Description
1.	Type of Study	Descriptive in the period 2015-16.
2.	Source of data collection	Primary source & Secondary Data
3.	From whom	
	a. Population	DU- Dialysis units of respective hospitals in Karnataka. And technicians/ In-charge/ Nephrologists of DU's who access/avail the facility in study area.
	b. Sampling Element	Individual DU and technicians/ In-charge/Nephrologist
	c. Sampling method	Compulsive Judgmental sampling
	d. Sample Size	DU-243
4.	Tool of Data Collection	Questionnaire *Annexure
5.	Statistical Techniques	Descriptive statistics, Graphs and charts
6.	Scope and limitation	The Scope of the study is limited to the responses of DU and technicians/ In-charge/Nephrologists

DATA ANALYSIS

Dialysis Centers - Current Status

DIALYSIS UNIT STATUS	HOSPITAL TYPE	Total
Running	Private	204
	Public	31
On Call Basis	Private	1
Dialysis Closed	Private	7
Grand Total		243

Source : Primary data

Hospital Category	Frequency	MODEL WISE MACHINES	Total
		COMPANY NAME	Total
ESI Hospital	3	Fresenius	453
General Hospital	41	Nipro	126
Govt. Hospital	25	B. Braun	147
Medical College	17	Baxter	90
Nursing Home	2	Gambro	72
Poly Clinic	1	Nikkiso	186
Standalone Clinic	10	Drake Willock	15
Superspeciality Hospital	142	Laser	3
NGO	1	SWS	9
Railway Hospital	1	Grand Total	1101
Grand Total	243		

Dialyzer - Modelwise

DIALYZER COMPANY NAME	Total
Fresenius	660
Nipro	99
Baxter	18
Browndove	3
Dora	3
Hydilena	6
Grand Total	789

CRRT Machines - Model Wise

CRRT MACHINE	Total
Fresenius	10
Gambro	6
B. Braun	1
Grand Total	17

DATA ANALYSIS

Dialysis Centers - Current Status

DIALYZER COMPANY NAME	MODEL NAME	MODEL USAGE
Fresenius	F6	261
	FX8	20
	F8	20
	F7	39
	F5	7
	FX5	15
	F8HPS	1
	Fresenius Total	
Nipro	1.5	10
	1.3	21
	Elisio	8
	Diacap	1
Nipro Total	Diacap	1
		41
Baxter	130	1
	Xenium	1
Baxter Total	xenium	2
	Xenium	1
Browndove	CAHT	1
		6
Browndove Total	pristine BD	230
		1
Dora		1
	B-14P	2
Dora Total		2
		2
Hydilena	Ap131	2
		2
Hydilena Total		2
	Grand Total	

In DIALYZER Fresenius is leader, Nipro is next in the race in the study region.

Blood Tubing

Details Of Dialysis Treatment & Patients

COMPANY NAME	Total	%
Fresenius	20724	54.22
Browndove	6456	16.89
Nipro	4291	11.23
MNE	2455	6.42
B.Braun	1776	4.65
Dr.Surgical	963	2.52
Perfect	900	2.35
Kawasumi	537	1.40
Dora	60	0.16
Nice	30	0.08
Biotrack	20	0.05
Bristline	10	0.03
Grand Total	38222	100

In Blood Tubing Fresenius is leader by market share 54.22%, Browndove is next in the race (16.89%) followed by Nipro (11.23%) in the study region.

Details Of Dialysis Treatment & Patients

Details Of Dialysis Treatment & Patients

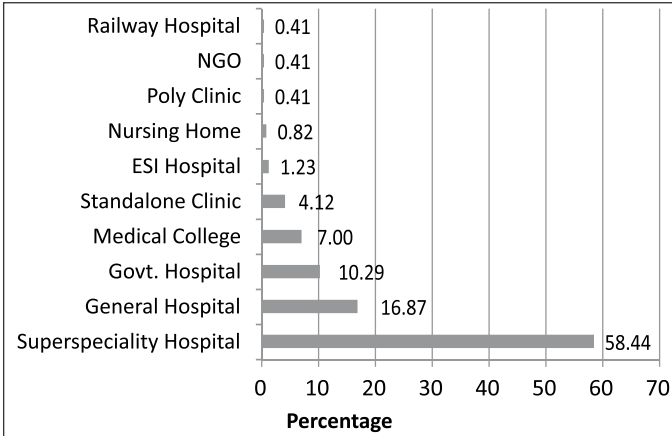
DISTRICT	DIALYSIS TREATMENTS	HD PATIENTS
SAGAR	94	13
BANGALORE	44663	4374
UTTARKANNADA	200	15
UDUPI	621	77
TUMKUR	1600	213
SHIMOGA	1859	205
RAMNAGAR	150	21
RAICHURE	258	51
MYSORE	5312	616
MANIPAL	1700	250
MANGALORE	6455	822
MANDYA	420	56
MADIKERI	116	26
KOLAR	633	53
HOSUR	409	47
HOSPET	52	8
HAVERI	90	18
HASSAN	1070	137
GULBARGA	1309	126
GADAG	115	26
DHARWAD	2716	470
DAVANGERE	1643	172
CHITRADURGA	160	33
CHIKMAGLUR	267	43
CHAMRAJNAGAR	224	36
BIJAPUR	1119	107
BIDAR	152	20
BELLARY	580	91
BELGAUM	1742	358
ADICHUCHNGIRI	100	18
CHIKBALLAPUR	280	19
UTTARA KANNADA	276	37
BAGALKOT	381	52
	76766	8610

Insurance

DISTRICT	CGHS	ESI	ECHS	RAILWAY	PRIVATE	OTHERS	Total
Bangalore	38	397	5	30	244	36	750
Udupi						4	4
Shimoga		10					10
Raichure					1		1
Mysore		47	1	11		13	72
Manipal		40				200	240
Mangalore		36	1		6	19	62
Kolar						2	2
Hosur		4			2		6
Hassan						5	5
Gulbarga		4					4
Dharwad		11	1	19			31
Davangere	8	8				1	17
Belgaum		15	8		2		25
Grand Total	46	572	16	60	255	280	1229

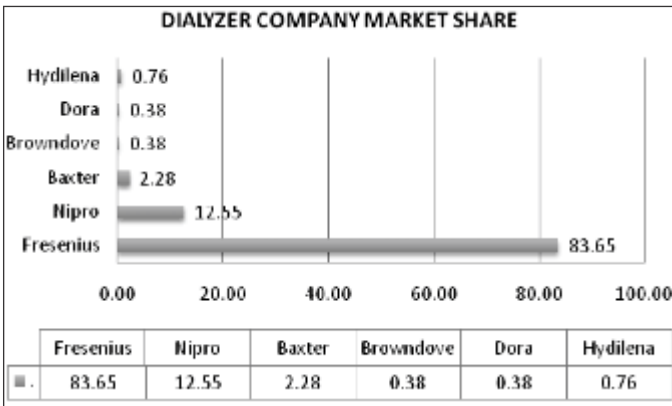
District	Fistula Making	Jugular 2	Femoral 2	Sub clavian 2	Graft Making	Normal Dialyzer New	Normal Dialyzer 1st reuse	HF Dialyzer New	HF Dialyzer 1st reuse	Normal Dialyzer New-s
Sagar	0	0	0	0	0	350	350	0	0	350
Bangalore	9211	6957	6957	6922	52230	2140	1127	2250	1450	2125
Uttarkannada	0	0	0	0	0	350	350	0	0	350
Udupi	9500	6750	6750	6750	50000	1504	954	0	0	1494
Tumkur	6500	6500	6500	6500	46250	2075	942	0	0	2075
Shimoga	12667	9167	9667	9667	56667	2450	968	0	0	1948
Ramnagar	0	0	0	0	0	350	250	0	0	350
Raichure	8000	8000	8000	8000	30000	1875	1013	0	0	1875
Mysore	8000	7000	7000	7000	48500	1634	834	0	0	1634
Manipal	7000	6000	6000	6000	40000	1020	1870	0	0	1870
Mangalore	8059	6353	6294	6294	52938	1946	909	0	0	1923
Mandya	8000	6000	6000	6000	55000	1300	750	0	0	1300
Madikeri	0	0	0	0	0	350	350	0	0	350
Kolar	5000	5000	5000	5000	40000	975	600	0	0	975
Hospet	0	0	0	0	0	350	350	0	0	350
Haveri	0	0	0	0	0	300	300	0	0	300
Hassan	10000	8000	8000	8000	55000	1633	883	0	0	1633
Gulbarga	9800	6080	6800	6800	52500	2250	1104	0	0	1920
Gadag	10000	8000	8000	8000	60000	775	625	0	0	775
Dharwad	10714	8286	8143	7514	56250	2444	1350	0	0	2444
Davangere	7500	6200	6000	6000	45000	2328	1253	0	0	2328
Chitradurga	15000	10300	11000	11000	65000	2950	1525	0	0	2200
Chikmaglur	7000	7000	7000	7000	45000	1950	825	0	0	1950
Chamrajnagar	0	0	0	0	0	350	350	0	0	350
Bijapur	8250	5125	6500	6500	55000	1975	1138	0	0	681
Bidar	0	0	0	0	0	240	240	0	0	240
Bellary	8500	6500	6500	6500	27500	1583	917	0	0	1583
Belgaum	10000	8000	8000	8000	60000	2075	1150	0	0	1481
	178701	141218	144111	143447	992835	39522	23277	2250	1450	36854

The market(Total Dialysis centers operating in Karnataka Region)



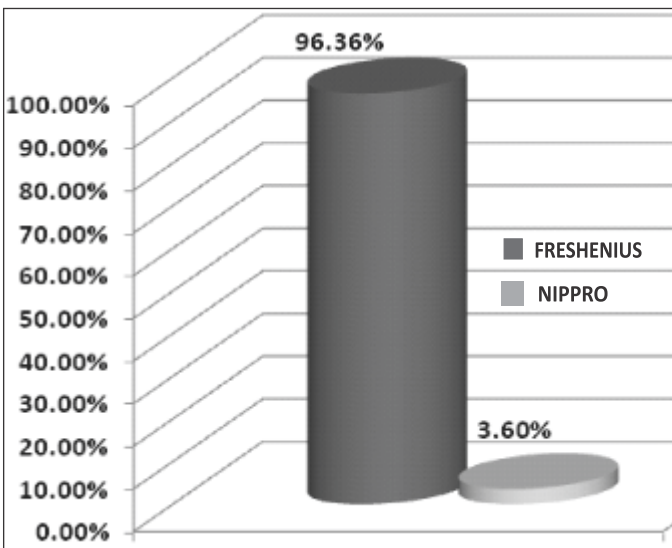
❖ The above graph represents the dialysis centers operating in the Karnataka region that is 58.44% of dialysis center are operating in Multi speciality / Super specialty hospital. 16.87% in General Hospital, 10.29% in Govt. Hospitals and 7% Medical college hospitals and 7.41% other hospitals (Railway, standalone and Charitable Hospitals) respectively.

Analysis of the position of Fresenius medical care India Pvt. Ltd. & competitors in renal sector.



The above graph shows that in machines segment 83.65% of the market share is acquired by the FRESENIUS, 12.55% of market is acquired by competitor NIPRO and other market share Baxter (2.38%), Browndove (0.38%), Dora (0.38%), Hydilena (0.76%) respectively.

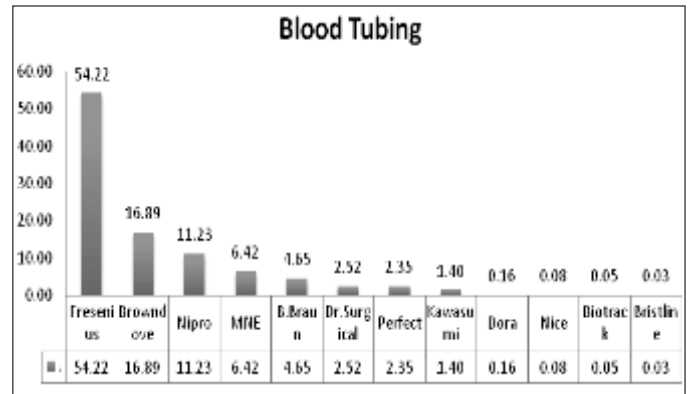
Doctors and Technicians Preferences



As per the survey 96.36% of the market share in the segment of Dialyzers has been acquired by FMC (Market leader) and 3.60% of market share is of its competitor Nipro.

Doctors and Technicians prefer FMC Dialyzers (Artificial Kidney) because of its Quality and its Re-Use.

Present seller of Blood tubing’s used in Dialysis in Karnataka Region

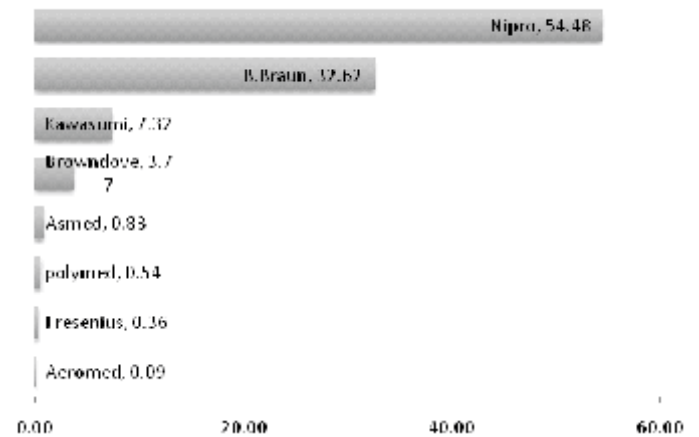


The above graph reveals that there is Competition between FMC and other players. 16.89% market share is of Browndove, 11.23% is of Nipro, 16.42% is of MNE and so on. Doctors says that “we prefer Browndove Blood tubings if not Fresenius”

Presence of sellers for Needlesets used in Dialysis in –Karnataka

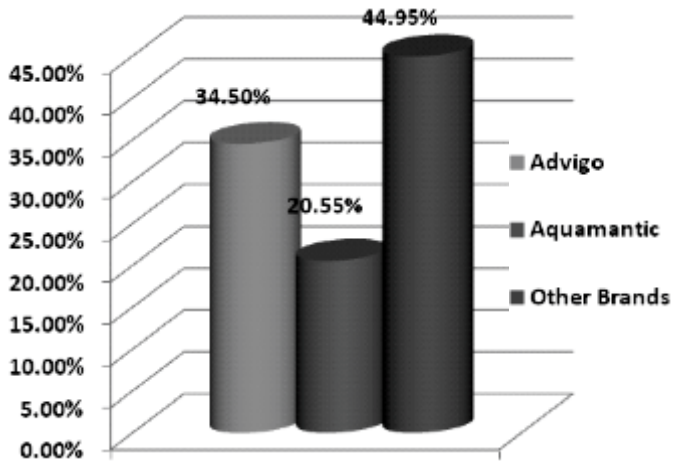
NEEDLE COMPANY	Needle company		Grand Total
	16"	17"	
Nipro	63637	31289	94926
Fresenius	520	100	620
B.Braun	40496	16338	56834
Kawasumi	8898	3859	12757
Browndove	3044	3518	6562
Aeromed	150		150
polymed	935		935
Asmed	1194	248	1442
Grand Total	118874	55352	174226

NEEDLE Market



Nipro is leader in the needle market followed by B. Braun & Kawasumi. Dialysis unit Incharge says we prefer Nipro Needlesets.

Presence of sellers of RO Water treatment plant required for Dialysis Karnataka

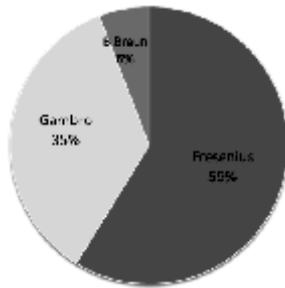


The result of data analysis about the use of RO water plant for Dialysis is 44.95% of market share is other companys. And 34.50% is of Advigo.

To analysis position of CRRT Machine In Karnataka region

CRRT Machines - Model Wise

CRRT MACHINE	Total
Fresenius	10
Gambro	6
B.Braun	1
Grand Total	17



From the graph it is very clear there is intense competition among B.Braun, Gambro and Fresenius in Karnataka Region.

Dialysis Equipments of Fresenius Medical Care

Dialysis Machine



DIALYZERS (Artificial Kidney)

