

FROM TRADITIONAL WISDOM TO GLOBAL LEADERSHIP

Ayush Vision 2030

Acknowledgement

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List of Abbreviations

Abbreviation	Full Form
AAM	Ayushman Arogya Mandir
AB-PMJAY	Ayushman Bharat Pradhan Mantri Jan Arogya Yojana
ABDM	Ayushman Bharat Digital Mission
ABHA	Ayushman Bharat Health Account
AI	Artificial Intelligence
AIIA	All India Institute of Ayurveda
AIIMS	All India Institute of Medical Sciences
API	Active Pharmaceutical Ingredient
Ayush	Ayurveda, Yoga & Naturopathy, Unani, Siddha and Homoeopathy
CAGR	Compound Annual Growth Rate
CGHS	Central Government Health Scheme
CoE	Centre of Excellence
DPIIT	Department for Promotion of Industry and Internal Trade
EU	European Union
FDI	Foreign Direct Investment
FMCG	Fast-Moving Consumer Goods
FPO	Farmer Producer Organization
FTA	Free Trade Agreement
GCC	Gulf Cooperation Council
GI	Geographical Indication
GMP	Good Manufacturing Practices
HACCP	Hazard Analysis and Critical Control Points
HCO	Healthcare Organisation
HMIS	Health Management Information System (if retained in the clinician/patient findings)
ISO	International Organization for Standardisation

IRDAI	Insurance Regulatory and Development Authority of India
IT	Information Technology
KII	Key Informant Interview
KPI	Key Performance Indicator
MDNIY	Morarji Desai National Institute of Yoga
MeitY	Ministry of Electronics and Information Technology
MRA	Mutual Recognition Agreement
MSME	Micro, Small and Medium Enterprise
MVT	Medical Value Travel
NABH	National Accreditation Board for Hospitals & Healthcare Providers
NABL	National Accreditation Board for Testing and Calibration Laboratories
NAM	National Ayush Mission
NCD	Non-Communicable Disease
NITI	National Institution for Transforming India
NMPB	National Medicinal Plants Board
OPD	Outpatient Department
PM-JAY	Pradhan Mantri Jan Arogya Yojana
PLI	Production Linked Incentive
PPP	Public-Private Partnership
R&D	Research and Development
TCM	Traditional Chinese Medicine
USD	United States Dollar
USFDA	United States Food and Drug Administration
WHO	World Health Organization
WHO-GTMC	WHO Global Traditional Medicine Centre

Executive Summary

India's Ayush sector stands at a historic inflection point. Global healthcare systems are increasingly shifting towards preventive, personalised, and holistic approaches to health, driven by rising healthcare costs, increasing prevalence of chronic diseases, ageing populations, and growing consumer demand for natural and wellness-oriented interventions. India stands as the primary home and institutional center for Ayurveda, Yoga, Naturopathy, Unani, Siddha, Sowa-Rigpa, and Homoeopathy, India possesses a unique opportunity to position Ayush not only as a healthcare system but as a strategic national asset contributing to public health, economic growth, exports, employment generation, and global influence and increasing acceptance.

Over the last decade, the Ayush ecosystem has witnessed unprecedented expansion, supported by policy reforms, institutional strengthening, growing public acceptance, and increasing international recognition. The sector has evolved into a significant contributor across healthcare services, manufacturing, wellness, research, and exports. However, despite this progress, Ayush remains underleveraged relative to its potential, both within India's healthcare system and in global markets.

This report presents **India Ayush Vision 2030**, a strategic roadmap to achieve two national ambitions:

1. Build a USD 213 Billion Ayush Economy by 2030

Through accelerated growth in manufacturing, healthcare services, wellness tourism, exports, research and innovation, digital health, the medicinal plant economy, and private investment.

2. Establish Ayush as the First Choice for Health Care

For preventive healthcare, wellness, lifestyle disorders, chronic disease management, rehabilitation, and healthy ageing, while complementing modern medicine in acute and emergency care.

Achieving these ambitions requires a shift from incremental growth to systemic transformation. The report identifies eight strategic missions that together form the foundation of Ayush Vision 2030: Manufacturing Expansion, First Choice health care and well-being, Export Promotion, Healthcare

Integration, Wellness Tourism, Research & Innovation, Digital Ayush, and Medicinal Plant & Global Ayush Diplomacy. These missions are supported by cross-cutting enablers including evidence generation, quality assurance, workforce development, digital infrastructure, investment mobilization, regulatory reforms and global collaboration.

Vision estimates that the Ayush economy can expand from its current scale to over USD 213 billion by 2030, with service sector emerging as the largest contributor, followed by manufacturing, International Ayush services, Yoga economy, export, wellness tourism, education, medicinal plant and digital health. Simultaneously, mainstream integration of Ayush within public health systems, insurance schemes, and primary healthcare delivery can significantly improve access to affordable, preventive, and patient-centric healthcare for millions of citizens.

The realisation of this vision will require coordinated action across ministries, state governments, industry, academia, healthcare providers, research institutions, and international partners. Policy alignment, public-private partnerships, scientific validation, market development, and global positioning will be critical to success.

By 2030, India has the opportunity to emerge as the global leader in traditional medicine and wellness, establish Ayush as a mainstream pillar of healthcare delivery, and create one of the world's largest health and wellness economies. The vision outlined in this report is therefore not only an economic growth agenda, but a national strategy to improve health outcomes, strengthen healthcare resilience, generate livelihoods, and enhance India's leadership in shaping the future of global healthcare.



India Ayush Vision 2030

Two National Ambitions. One Transformative Vision.



Ambition 1

Ayush as the First Choice of Therapy

For Prevention • Wellness • Lifestyle Disorders • Chronic Disease Management • Healthy Ageing



Ambition 2

Build a USD 213 Billion Ayush Economy by 2030

Driving Growth • Exports • Innovation • Jobs Investments • Global Leadership

WHY NOW?

 Rising NCD Burden	 Escalating Healthcare Costs	 Global Shift towards Preventive Care	 Growing Demand for Natural & Holistic Solutions	 Wellness Economy Expanding Rapidly
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INDIA'S UNIQUE ADVANTAGE

 5000+ Years of Traditional Knowledge	 9+ Lakh Ayush Practitioners	 9,000+ Manufacturing Units	 Strong Policy & Institutional Support	 Global Recognition of Yoga & Ayurveda
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THE USD 200 BILLION OPPORTUNITY

Ayush Economy 2030

 Ayush Manufacturing (Medicines, Cosmetics Nutraceuticals, Wellness Products)	 Ayush Healthcare Services, Preventive Wellness & Corporate Health Programs	 Wellness Tourism & Medical Value Travel	 Exports (Products + Services) Chains	 Medicinal Plant Economy & Raw Material Supply	 Yoga Economy (Training, Certification, Corporate Wellness, Digital Yoga Platforms)	 Ayush Education & Skill Development	 International Ayush Services (Tele-Ayush, Training, Franchising, Clinics Abroad)
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EIGHT STRATEGIC MISSIONS

 National Ayush Manufacturing Mission	Scale, Quality & Competitiveness
 First Choice Of Healthcare	Mass Adoption, Trust & Integration
 Ayush Export Mission	Global Markets, Brand India, Trade Leadership
 Integrative Healthcare Mission	Mainstreaming Ayush in Public & Private Health Systems
 Ayush Wellness Tourism Mission	Position India as Global Wellness Destination
 Research & Innovation Mission	Evidence, Innovation & Global Knowledge Leadership
 Digital Ayush Mission	Technology-led, Accessible & Mission Personalized Care
 Medicinal Plants & Ayush Diplomacy Mission	Sustainable Supply, Global Partnerships & Soft Power

FIVE FOUNDATIONAL ENABLERS

 EVIDENCE & RESEARCH	Strengthen scientific validation, clinical research and data to build global credibility.
 QUALITY & STANDARDS	Ensure world-class quality, safety, regulation and accreditation.
 DIGITAL INFRASTRUCTURE	Build integrated digital platforms for care, data, education and innovation.
 SKILLED WORKFORCE	Expand capacity, upskill practitioners and create future-ready talent pipeline.
 INVESTMENT & FINANCING	Mobilize public, private and international capital at scale; enable ease of doing business.

Roadmap to 2030

2026	2027	2028	2029	2030
FOUNDATION BUILDING • Policy Alignment • Institutional Strengthening • Data & Baseline Creation • Capacity Building	SCALE-UP • Infrastructure Expansion • Manufacturing Scale-Up • Integrated Pilot Programs • Market Development	MAINSTREAM INTEGRATION • Ayush in Public Health • Insurance & Financing • Clinical Protocols • National Awareness Drive	NATIONAL ADOPTION • Ayush Departments in all tertiary care hospitals • Widespread Utilization • Quality Assurance • International Expansion • Innovation Commercialization	GLOBAL LEADERSHIP • USD 213 Billion Economy • First Choice of Health Care • Global Standards & Influence • Viksit Bharat Goal Alignment

Transformative Outcomes by 2030

HEALTH IMPACT				ECONOMIC IMPACT				GLOBAL IMPACT			
 Prevention-led Healthcare System	 Reduced NCD Burden	 Improved Mental Well-being & Immunity	 Affordable, Accessible Care for All	 Stronger USD 213 Bn Economy	 Massive Job Creation	 Higher Exports & Investments	 Stronger MSMEs & Rural Economies	 Global Leader in Traditional Medicine	 Preferred Wellness & Medical Value Destination	 Ayush in Global Health Systems	 Enhanced Health Diplomacy & Soft Power

Chapter:1 Introduction

1.1 A Defining Moment for Ayush and India

India stands at a pivotal moment in its healthcare and economic evolution. Across the world, healthcare systems are witnessing a shift towards preventive, personalised, and holistic approaches to health, driven by rising healthcare costs, increasing patient burdens, lack of specialists, increasing prevalence of chronic diseases, ageing populations, and growing demand for wellness-oriented solutions. In this changing landscape, India possesses a unique strategic advantage through its rich heritage of traditional medicine systems.

For over 5,000 years, traditional medicine systems have provided holistic frameworks for health and well-being. Rooted in prevention, lifestyle management, and harmony between individuals and nature, these systems embody principles that closely align with emerging global healthcare trends. What the world today describes as integrative medicine, preventive healthcare, and personalised wellness has long been embedded within the traditional medicine systems philosophy in Indian heritage.

The establishment of the Ministry of Ayush in 2014 marked a defining moment in India's healthcare journey. Over the past decade, the sector has evolved from a largely fragmented ecosystem into a rapidly expanding healthcare and wellness industry. Today, Ayush represents an estimated USD 63 billion (2025) ecosystem spanning healthcare services, manufacturing, wellness, research, education, and exports.

As India advances towards becoming a developed nation, Ayush presents a unique opportunity to improve population health, generate employment, strengthen rural livelihoods, boost exports, and enhance India's global influence. Recognizing this potential, the Ministry of Ayush has articulated a transformative vision anchored on two national ambitions:

Establish Ayush as the First Choice of health care and well-being for preventive and holistic healthcare.

Build a USD 213 billion Ayush Economy by 2030 through growth across healthcare, manufacturing, exports, wellness tourism, research, and innovation.

India Ayush Vision 2030 is therefore not merely a sectoral growth strategy; it is a national roadmap to position India as the global leader in traditional medicine, wellness, and integrative healthcare.

1.2 The 15x Growth Story: A Decade of Transformation (2014–2025)

The past decade (2014-24)¹ has been transformative for the Ayush sector. Supported by strong policy interventions, rising consumer confidence, growing global acceptance, and increasing investment, the sector has recorded significant growth across healthcare services, manufacturing, exports, education, and wellness. Government commitment has been reflected through steadily increasing budgetary allocations, expansion of healthcare infrastructure, strengthening of research institutions, and promotion of quality standards

and international collaborations. The Ministry of Ayush's budget allocation has increased to nearly ₹4,000 crore² in FY 2025–26 and ₹4,400 crore in 2026-27, underscoring the strategic importance of the sector.

The next decade presents an unprecedented opportunity to transform Ayush from a growing sector into a globally recognized healthcare and economic powerhouse.

1.3 The USD 213 Billion Vision and the Seven Strategic Pillars

India's Ayush sector is entering a defining decade of transformation. Between 2014 and 2024, it evolved from a fragmented, largely domestic ecosystem into a strategic pillar of healthcare, wellness, and economic growth. Strengthened institutions, sustained public investment, rising consumer confidence, global partnerships, and increasing international demand have laid a strong foundation for its next phase of growth.

USD 213 Billion Ayush economy by 2030

Recognizing this potential, the Ministry of Ayush has articulated an ambitious vision, while establishing Ayush as a mainstream pillar of healthcare delivery and the health care and well-being for curative, preventive, chronic and holistic health management. Achieving this vision will require more than incremental

growth; it demands a coordinated transformation of the entire Ayush ecosystem through targeted investments, policy reforms, innovation, and market development.

The pathway to a USD 213 billion Ayush economy and making Ayush the first choice of health care and well-being rests on Seven interdependent strategic pillars that collectively define the sector's growth architecture.



Pillar 1: Manufacturing of Ayush Products

Manufacturing forms the foundation of India's Ayush economy, transforming the country's rich biodiversity and traditional knowledge into high-quality raw material, medicines, nutraceuticals, herbal cosmetics, wellness products, and value-added formulations. Strengthening manufacturing competitiveness through quality assurance, innovation, modern infrastructure, and resilient supply chains will position India as a global hub for Ayush products while driving industrial growth, exports, and employment.



Pillar 2: Export Expansion: Unlocking Ayush's Global Opportunity

As global demand for natural, preventive, and holistic healthcare continues to grow, India has a significant opportunity to expand its footprint in international markets. By strengthening regulatory compliance, global branding, market access, product standardisation, and export-oriented manufacturing, Ayush can evolve into a major contributor to India's healthcare exports and global economic influence.



Pillar 3: Ayush Service Sector and Integration with Mainstream Healthcare

The long-term growth of Ayush depends on its integration into India's mainstream healthcare ecosystem. Expanding evidence-based Ayush services across hospitals, primary healthcare, insurance, digital health, and preventive care will improve healthcare access, strengthen patient outcomes, and establish Ayush as an integral component of a holistic and people-centric health system.



Pillar 4: Wellness Tourism & Medical Value Travel

India possesses a unique global advantage as the home of Ayurveda, Yoga, and holistic wellness traditions. By developing world-class wellness destinations, integrated treatment centres, Medical Value Travel ecosystems, and seamless international patient services, India can position itself as the world's preferred destination for preventive, restorative, and wellness-led healthcare.



Pillar 5: Research, Evidence and Digital Transformation

Research, evidence generation, innovation, and digital transformation will serve as the foundational enablers of sustainable growth across all pillars. Building on India's expanding ecosystem of dedicated Ayush research councils, Centres of Excellence, interdisciplinary research, clinical trials, pharmacovigilance programmes, and international collaborations, the next phase will focus on generating high-quality scientific evidence, advancing translational research, strengthening standardisation, and accelerating innovation. Simultaneously, digital technologies integrated with the Ayushman Bharat Digital Mission will transform healthcare delivery through tele-consultations, longitudinal digital health records, AI-enabled clinical decision support, real-world evidence generation, and data-driven patient management, enhancing the quality, accessibility, and global credibility of Ayush.



Pillar 6: International Ayush Services and Global Knowledge Economy

India's leadership in traditional medicine extends beyond products to the global export of healthcare services, education, professional training, digital consultations, and institutional partnerships. By leveraging its skilled workforce, research capabilities, digital infrastructure, and international collaborations, India can establish itself as the world's leading provider of Ayush knowledge and services, creating a high-value global services economy.



Pillar 7: Yoga Economy: Positioning India as the Global Hub for Yoga, Wellness and Preventive Health

Yoga represents one of India's strongest global soft-power assets and a rapidly expanding economic opportunity across wellness, healthcare, education, tourism, digital platforms, and professional training. Building on its authentic heritage and growing international recognition, India can strengthen its position as the global hub for Yoga while advancing preventive healthcare, wellness innovation, and sustainable economic growth.

1.4 An Integrated Growth Framework

These Seven pillars are not standalone priorities; they constitute an integrated growth architecture that reinforces the entire Ayush ecosystem. Advances in manufacturing strengthen global competitiveness and export readiness; research, evidence generation, and quality assurance enhance clinical credibility, regulatory acceptance, and insurance integration; expanded service delivery increases healthcare utilization and economic value creation; while wellness tourism and medical value travel strengthen India's global positioning. Underpinning all pillars, digital public infrastructure serves as the enabling backbone, driving interoperability, efficiency, transparency, accessibility, and data-driven innovation across the ecosystem.

The vision of building a USD 213 billion Ayush economy by 2030 is not merely an aspirational milestone. It represents a strategic national opportunity supported by favourable demographic trends and availability of high-quality raw material, rising global demand for preventive and holistic

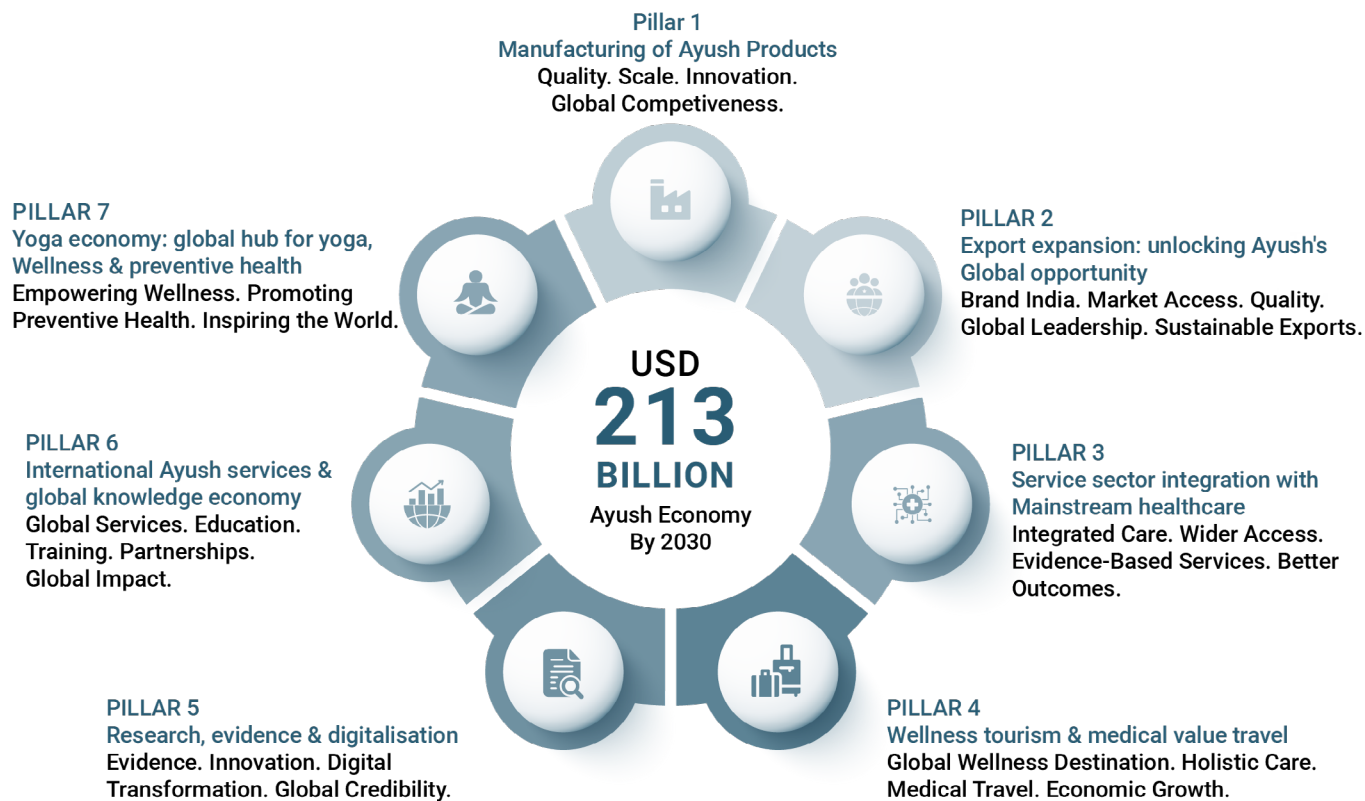
healthcare, expanding international acceptance of traditional medicine, sustained government commitment, and India's unparalleled heritage of traditional knowledge. Realizing this opportunity will require coordinated policy action, regulatory excellence, scientific leadership, institutional capacity, and sustained public-private investment across the entire value chain.

Beyond economic expansion, Ayush Vision 2030 presents a blueprint for positioning India as the global leader in traditional medicine and integrative healthcare. By strengthening healthcare delivery, accelerating innovation, expanding exports and services, generating high-quality employment, and advancing evidence-based traditional medicine, Ayush can emerge as a strategic pillar of India's health security, economic competitiveness, and global leadership contributing meaningfully to the future of healthcare worldwide.

India Ayush Vision 2030

THE USD 213 BILLION OPPORTUNITY

Seven Pillars. One Integrated Ecosystem. Transforming India. Inspiring the World.



DIGITAL INFRASTRUCTURE - THE CONNECTIVE LAYER

Enabling Integration. Driving Efficiency. Ensuring Access. Scaling Impact.

AN INTEGRATED GROWTH ECOSYSTEM



WHY THE USD 213 BILLION VISION IS ACHIEVABLE



1.5 Methodology and Data Sources

This report adopts a robust, evidence-based approach combining quantitative analysis, policy review, market assessment, and stakeholder consultations to evaluate the growth potential of the Ayush sector and develop a strategic roadmap towards a USD 213 billion Ayush economy by 2030. The analysis is based on four key components:



Secondary Research and Landscape Assessment:

A comprehensive review of government reports, policy documents, industry publications, market studies, and national and international literature was undertaken to assess the current size, structure, trends, and growth trajectory of the Ayush ecosystem in India.



Policy and Regulatory Review

Existing national policies, regulatory frameworks, institutional mechanisms, and flagship government initiatives were analysed to identify growth enablers, implementation gaps, and opportunities for sectoral expansion.



Market Sizing and Economic Projections

Both top-down and bottom-up methodologies were employed to estimate the current market size and future growth potential across key segments, including Ayush healthcare services, pharmaceuticals, manufacturing, wellness products, medical value travel, and exports.



Primary Research and Stakeholder Consultations

Insights were gathered through Key Informant Interviews (KIIs) with clinicians, therapists, international patients, domestic patients, households, and consultations with industry leaders, manufacturers, practitioners, researchers, academic institutions and policymakers. Primary research was conducted at leading Ayush institutions, including the All India Institute of Ayurveda (AIIA), Morarji Desai National Institute of Yoga (MDNIY), and Kottakkal Arya Vaidya Sala in Delhi. In addition, a household survey was undertaken to assess public awareness, perceptions, utilisation patterns, and accessibility of Ayush services and products. These findings provide critical insights into the opportunities and barriers associated with achieving the Vision 2030 objectives.



Field Assessment of Ayush Healthcare Institutions

A primary field assessment covering 100 Ayush healthcare institutions across Assam, Karnataka, Kerala, and Madhya Pradesh was conducted to understand the existing landscape of Ayush healthcare delivery. The assessment examined healthcare integration, institutional infrastructure, service delivery models, workforce availability, digital readiness, and operational practices, generating evidence-based insights to validate secondary research findings and support the development of practical, implementation-oriented recommendations for Ayush vision 2030.

Together, these inputs form the analytical foundation of this report and inform the strategic recommendations presented across the subsequent chapters.

Chapter:2

Pillar 1: Manufacturing of Ayush Products

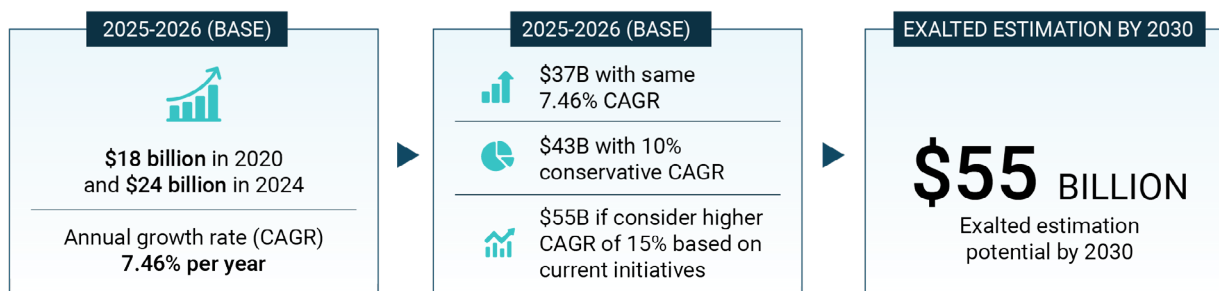
Manufacturing will serve as the industrial backbone of India's Ayush Vision 2030. Scaling the sector from its current value of approximately USD 24 billion³ to USD 55 billion will require a fundamental transformation of the manufacturing ecosystem, driven by pharmaceutical-grade cluster development, resilient supply chains, quality standardisation, and sustainable raw material sourcing. Strengthening manufacturing competitiveness at scale will be critical to ensuring product consistency, regulatory compliance, and global market access.

India Ayush Vision 2030

Two National Ambitions. One Transformative Vision.



Ayush Manufacturing: Growth Potential To 2030



KEY ENABLERS TO ACHIEVE 15% CAGR & REACH \$55 BILLION BY 2030



2.1 Overview of India's Ayush Manufacturing Landscape

Geographic Concentration and Ayush Manufacturing Hubs

Diverse Regions. Unique Strengths. One Strong Ayush Ecosystem.

State/Region	Strategic Strength	Key Products	Key Medicinal Plants		
 Uttarakhand (Haridwar-Rishikesh)	India's largest Ayush manufacturing hub with leading national brands, modern industrial infrastructure, export-oriented production, and research institutions.	 Ayurvedic medicines, nutraceuticals, herbal cosmetics, export products, classical formulations	 Ashwagandha (Withania somnifera)	 Giloy (Tinospora cordifolia)	 Tulsi (Holy Basil-Ocimum tenuiflorum)
 Himachal Pradesh	High-altitude medicinal plant biodiversity, pharmaceutical ecosystem, and emerging herbal manufacturing cluster.	 Herbal medicines, pharmaceutical products, herbal formulations	 Kutki (Picrorhiza kurroa)	 Atis (Aconitum heterophyllum)	 Jatamansi (Nardostachys jatamansi)
 Kerala	Global centre for classical Ayurveda, Panchakarma, wellness services, and traditional formulations.	 Classical Ayurvedic medicines, medicated oils, Ashtavaidya formulations, wellness products	 Ashwagandha (Withania somnifera)	 Brahmi (Bacopa monnieri)	 Aloe vera (Aloe barbadensis)
 Gujarat	Large-scale pharmaceutical manufacturing, nutraceuticals, botanical extracts, and export-oriented production.	 Herbal extracts, nutraceuticals, botanical extracts, export products	 Isabgol (Psyllium-Plantago ovata)	 Aloe vera (Aloe barbadensis)	 Amla (Indian Gooseberry-Phyllanthus emblica)
 Maharashtra	Strong pharmaceutical ecosystem innovation, exports, and value-added herbal products.	 Herbal supplements, botanical extracts, nutraceuticals, cosmetics	 Ashwagandha (Withania somnifera)	 Guduchi (Tinospora cordifolia)	 Turmeric (Curcuma longa)
 Madhya Pradesh	One of India's largest medicinal plant cultivation and raw material sourcing hubs.	 Herbal raw materials, Ayurvedic medicines, classical and proprietary formulations	 Safed Musli (Chlorophytum borivilianum)	 Kalmegh (Andrographis paniculata)	 Shatavari (Asparagus racemosus)
 Rajasthan	Arid medicinal plant cultivation, herbal processing, and traditional medicine manufacturing.	 Herbal products, processed botanicals, medicinal gums, Ayurvedic formulations	 Aloe vera (Aloe barbadensis)	 Guggal (Commiphora mukul)	 Senna (Cassia angustifolia)
 Uttar Pradesh	Large manufacturing base supported by extensive cultivation and traditional medicine institutions.	 Ayurvedic medicines, herbal products, Ayurvedic formulations, wellness products	 Tulsi (Holy Basil-Ocimum tenuiflorum)	 Amla (Indian Gooseberry-Phyllanthus emblica)	 Aloe vera (Aloe barbadensis)
 Jammu & Kashmir	Rich Himalayan biodiversity with high-value medicinal and aromatic plants.	 Medicinal and aromatic plant extracts, pharmaceutical formulations	 Saffron (Crocus sativus)	 Lavender (Lavandula angustifolia)	 Kuth (Saussurea costus)
 North-East India	Emerging bio-resource hub with unique indigenous medicinal plants and significant cultivation potential.	 Herbal extracts, traditional formulations, wellness products, botanical ingredients	 Agarwood (Aquilaria agallocha)	 Bhut Jolokia (Capsicum chinense)	 Mizoram Ginger (Zingiber officinale)

STRATEGIC WAY FORWARD

 SPECIALIZED CULTIVATION ZONES Develop medicinal plant clusters with FPO engagement and sustainable cultivation practices.	 WORLD-CLASS MANUFACTURING CLUSTERS Establish GMP-compliant manufacturing parks with shared infrastructure and common facilities.	 RESEARCH & INNOVATION ECOSYSTEM Strengthen R&D, testing labs, and incubation centres to drive innovation and commercialization.	 INTEGRATED LOGISTICS & QUALITY ASSURANCE Build robust supply chains, quality certification systems, and cold chain & storage infrastructure.	 EXPORT & GLOBAL COMPETITIVENESS Enhance global market access through branding, regulatory alignment, trade facilitation, and strategic partnerships.	 OUTCOME Stronger regional specialization, higher value addition, robust supply chains, and global leadership for India's Ayush sector.
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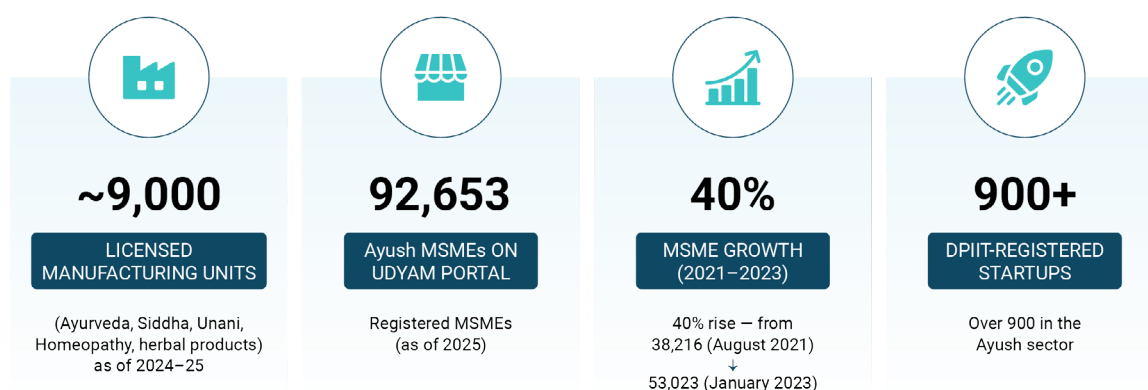
Together, these clusters account for a substantial share of India's Ayush manufacturing output and form the foundation of the sector's future growth⁴.

As the industry targets a scale-up from approximately \$24 billion⁵ to \$55 billion by 2030, the next phase of growth will require strengthening existing manufacturing clusters,

developing new industrial ecosystems focused on quality assurance, innovation, export readiness, essentials quality certifications for international markets and integrated supply chains. Strategic investments in cluster-based infrastructure, testing facilities, GMP compliance, sustainable raw material sourcing are critical to enhancing global competitiveness and supporting the sector's long-term expansion^{6,7}.

India's Ayush Manufacturing Ecosystem

Current Scenario - Key Manufacturing Indicators



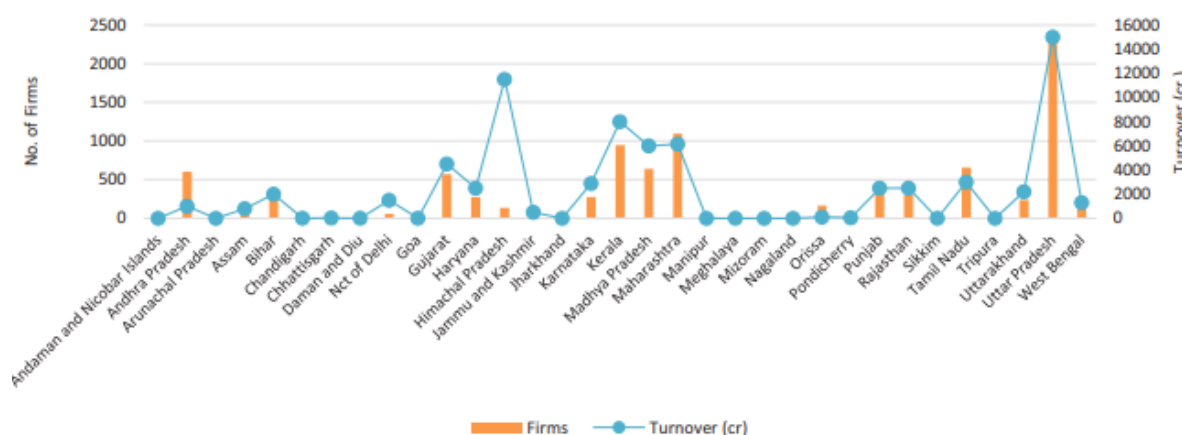
2.2 Pathways to Scale Ayush Manufacturing

2.2.1 Current State of Ayush Manufacturing

Manufacturing is expected to be the single largest contributor to India's \$213 billion Ayush vision. The sector has demonstrated strong growth over the past decade, from less than \$3 billion in 2014 to approximately \$24 billion in 2022. India's nutraceutical sector is expanding rapidly, valued at approximately US\$32.14 billion in 2024⁸, driven by increasing domestic demand, expanding product portfolios, and growing global acceptance of Ayush products.

To achieve the Vision 2030 target of **USD 55 billion**, the manufacturing ecosystem must undergo a significant transformation over the next five years. This will require growth substantially above historical trends and a shift from a fragmented production landscape towards a globally competitive, quality-assured, innovation-led manufacturing ecosystem.

State-Wise Distribution of Ayush Firms in India⁹

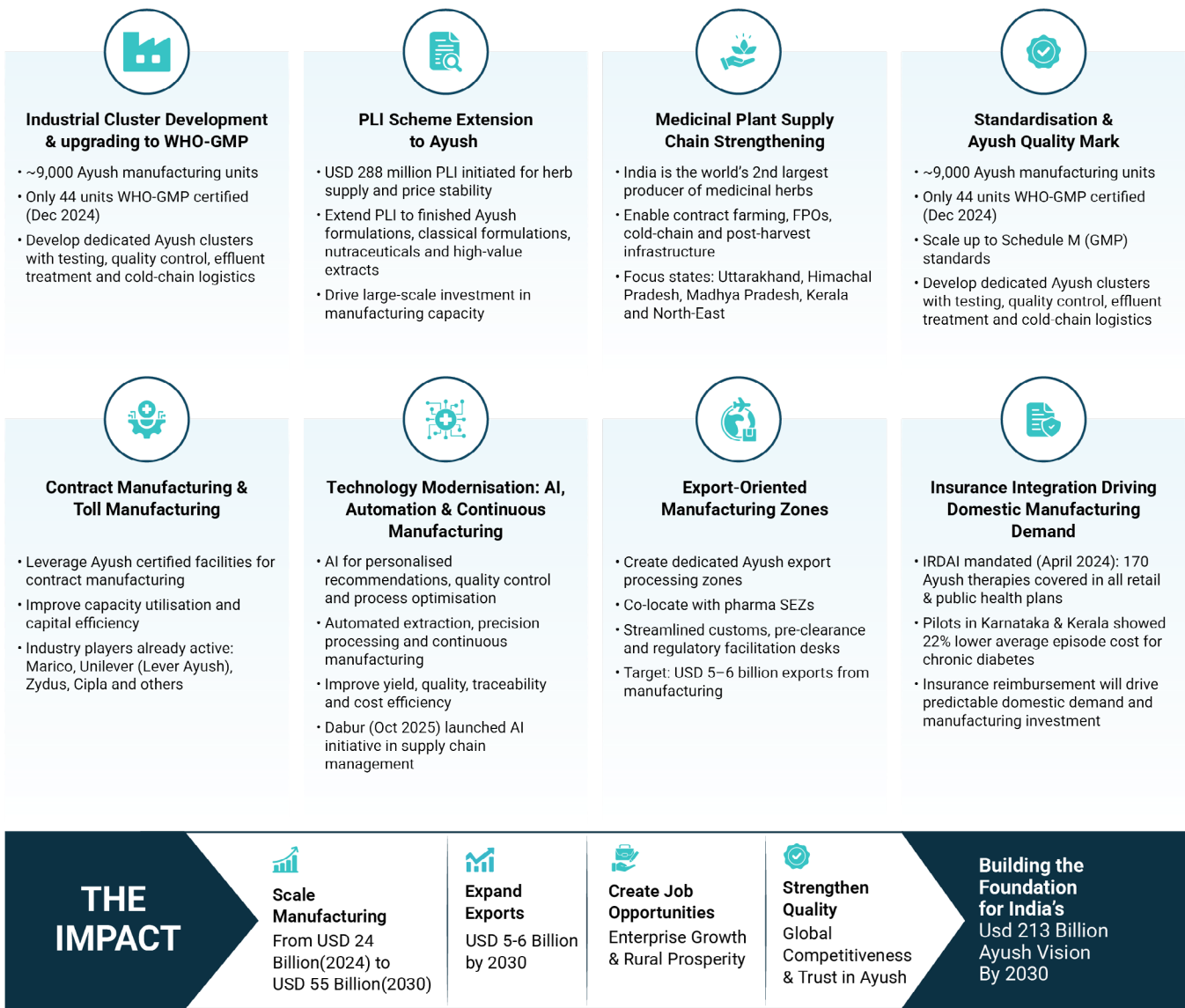


The next phase of growth will be determined not only by increased production capacity but also by improvements in quality standards, supply chain resilience, export readiness, research integration, and industrial scale.

2.2.2 Eight Strategic Pathways to Scale Ayush Manufacturing

8 Pathways To Scale Ayush Manufacturing

Transforming Manufacturing. Strengthening Quality. Expanding Global Reach.



Note: Data as of Dec 2024 unless stated otherwise.
Sources: Ministry of Ayush, Govt. of India; Udyam Portal; DPIIT; Industry Reports.

2.3 Unlocking Value Through Ayush Manufacturing

Transforming Medicinal Plants into High-Value Products and Export Opportunities^{10 11 12 13}

From Raw Herb To High-Value Ayush Products

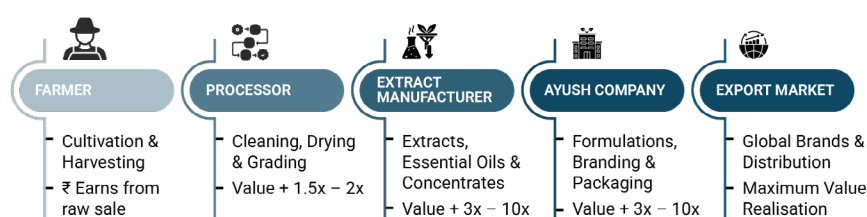
Value Addition is the Key Multiplier for India's Ayush Economic Growth

Processing herbs into standardized extracts, formulations and branded products can increase value realisation by **5x** to **50x** compared to selling raw materials.

Top 7 High-Value Ayush Herbs with Maximum Value Creation Potential

 Ashwagandha (Withania somnifera)	 Shatavari (Asparagus racemosus)	 Brahmi (Bacopa monnieri)	 Giloy (Tinospora cordifolia)	 Amla (Phyllanthus emblica)	 Tulsi (Ocimum sanctum)	 Moringa (Moringa oleifera)
RAW ROOT ₹80 – 150/kg	RAW ROOT ₹120 – 200/kg	RAW HERB ₹80 – 150/kg	RAW STEM ₹30 – 60/kg	RAW FRUIT ₹15 – 35/kg	RAW LEAVES ₹40 – 80/kg	RAW LEAVES ₹15 – 25/kg
 Extracts, Capsules, Tablets ₹800 – 2,500/kg	 Women's Health Formulations ₹1,500 – 3,000/kg	 Cognitive Wellness Products ₹800 – 2,500/kg	 Extracts, Tablets, Immunity Products ₹800 – 1,500/kg	 Nutraceuticals, Herbal Juices, Extracts ₹800 – 2,000/kg	 Oils, Extracts, Wellness Products ₹600 – 1,500/kg	 Powders, Capsules, Nutraceuticals ₹500 – 1,200/kg
10 – 17x	12 – 15x	10 – 17x	10 – 25x	20 – 50x	8 – 20x	20 – 40x

The Ayush Value Chain – Where Value Multiplies



The Big Opportunity

- Exporting raw herbs captures only 5–10% of the potential value chain.
- Value addition through processing, standardization and branding can increase value realization by up to 50 times.
- This drives higher farmer incomes, manufacturing growth, exports, employment and overall economic development.

Value Addition is the Growth Engine for India's **USD 213 Billion** Ayush Vision by 2030

2.4 Mobilising Investment for Manufacturing Transformation

Achieving the Vision 2030 manufacturing target of USD 55 billion will require a substantial expansion of India's Ayush production capacity, quality infrastructure, technology adoption, and supply chain ecosystem. While policy support and public investments will play a catalytic role, the scale of transformation envisaged cannot be achieved through government funding alone. It will require sustained private sector participation and long-term capital deployment across the Ayush value chain.

Based on industry benchmarks from pharmaceutical, nutraceutical, and consumer health sectors, scaling Ayush manufacturing from approximately \$24 billion today to \$55 billion by 2030 is expected to require investments in new manufacturing facilities, upgrading to WHO-GMP, quality testing infrastructure and international certifications, research and development, digital technologies, medicinal plant supply chains, and export-oriented production capabilities.

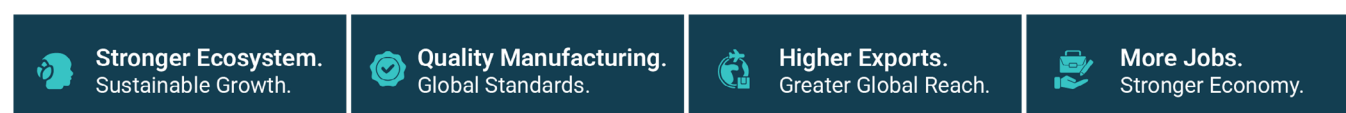
Government initiatives such as the National Ayush Mission and Ayush Oushadhi Gunvatta Evam Utpadan Samvardhan Yojana (AOGUSY), support for medicinal plant cultivation, quality assurance programmes, industrial cluster development, and state-level incentive schemes

provide a strong enabling foundation. However, the next phase of growth must be led by private capital and industry investments capable of driving scale, innovation, and global competitiveness.

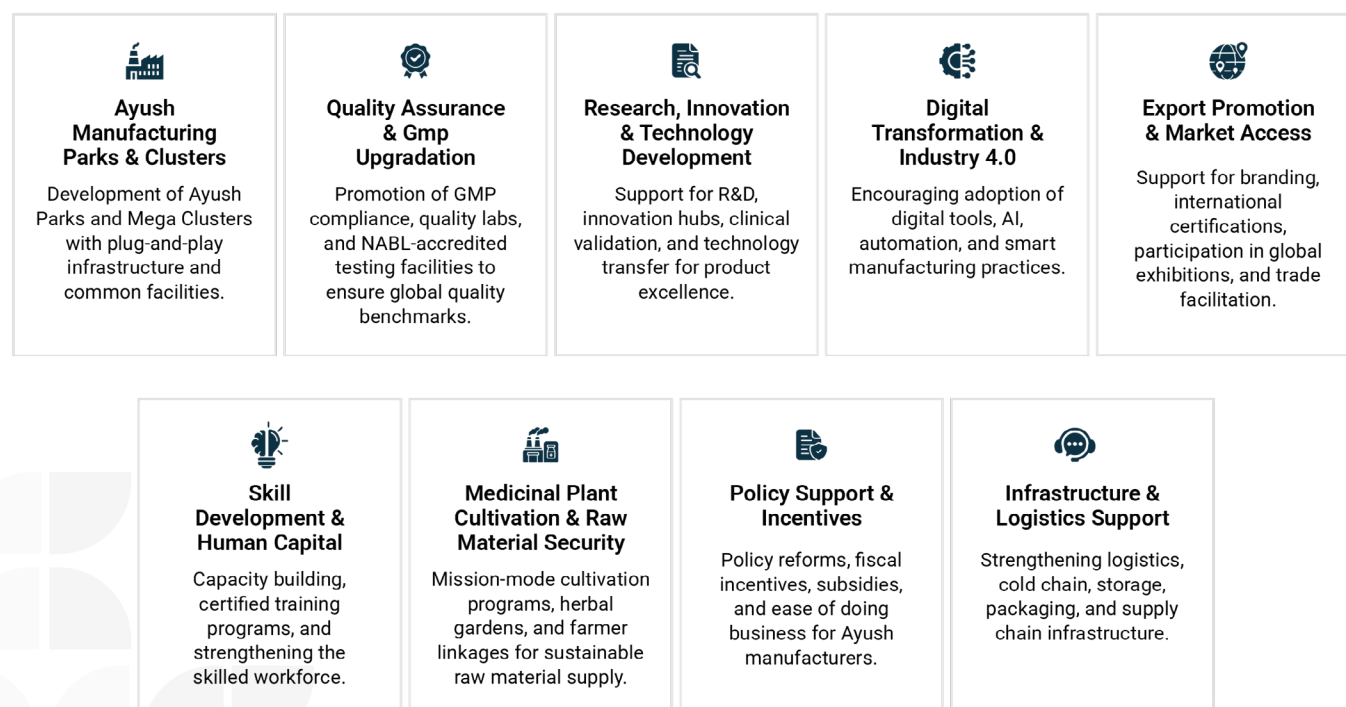
The investment opportunity spans the entire Ayush ecosystem and can be unlocked through multiple channels:

Unlocking Investment. Accelerating Ayush Growth

Mobilising Private Capital Across the Ayush Ecosystem for Scale, Innovation & Global Leadership



Key Initiatives By Government Of India To Strengthen Ayush Manufacturing



The strong growth of the Ayush entrepreneurial ecosystem underscores the sector's investment potential. The number of registered Ayush MSMEs has increased significantly in recent years, while the emergence of new-age wellness brands, nutraceutical companies, and technology-enabled Ayush startups reflects growing investor confidence and market demand.

Going forward, investment mobilisation would focus not merely on expanding production capacity, but on building globally competitive manufacturing ecosystems characterized by quality assurance, innovation, research integration, digitalisation, and export readiness. Such investments will be critical in transforming Ayush from a predominantly domestic industry into a globally recognised manufacturing and export powerhouse.



Reaching the **USD 55 billion** manufacturing target by 2030 requires moving beyond public funding to mobilize sustained private equity, venture capital, and Foreign Direct Investment (FDI) across the ecosystem.

2.5 Strategic Imperative

The investment challenge is not simply one of capital availability, but of directing capital towards high-value manufacturing, quality infrastructure, innovation, and global market development. The sectors that successfully attract

and deploy such investments will be best positioned to capture the next wave of growth in the global traditional medicine and wellness economy.

2.6 Major Manufacturers and Estimated Valuations

While several large, established brands have emerged within the Ayush ecosystem, the sector remains predominantly driven by a vast network of MSMEs and small-scale manufacturers. The combined estimated revenues of the leading organised Ayush players account for only a fraction of the overall manufacturing market, highlighting the significant role of the unorganised and semi-organised segments in driving production and supply. This fragmented structure presents both a challenge and a substantial opportunity. As India pursues its ambition of building a \$55 billion Ayush manufacturing sector by 2030, the next phase

of growth will depend on successfully transitioning this broad manufacturing base towards higher levels of quality, standardisation, innovation, and global competitiveness.

**E-commerce penetration for
Ayush brands crossed**

25% of total sector sales in 2024

growing at an impressive 15.68% CAGR led by new-age digital-first D2C players.

Leading Indian Ayush Companies

REVENUE & MARKET POSITION (2024–25)

Strong Brands. Diverse Portfolios. Expanding Global Presence.

 COMPANY	 EST. REVENUE (2024–25)	 KEY AYUSH / HERBAL SEGMENTS	 MARKET POSITION
 Dabur India	₹12,404 Cr (~USD 1.5 Bn)	Healthcare, oral care, hair care, digestives, chyawanprash, juices	Largest Ayurvedic company; 18% herbal market share; present in 120 countries
 Patanjali Ayurved	~USD 800 Mn (Ayurvedic revenue)	FMCG, food, personal care, classical formulations	Tier 2/3 city dominance; highest volume among pure-play Ayush brands
 Himalaya Wellness	USD 400–500 Mn (est.)	Herbal healthcare, personal care, nutraceuticals	Present in 100+ countries; strongest in scientific validation
 Emami Ltd. (Inc. Zandu)	~USD 400–450 Mn (Ayush segment)	Pain relief, hair oils, skin care, classical formulations	Strong in OTC and specialty segments; Zandu heritage brand
 Shree Baidyanath Ayurved	USD 150–200 Mn (est.)	Classical Ayurvedic formulations, raseyanas	Oldest branded Ayurvedic company; strong in classical segment
 Charak Pharma	USD 80–100 Mn (est.)	Ethical Ayurvedic pharmaceuticals	Doctor-prescribed Ayurvedic medicines; growing export presence
 Maharishi Ayurveda	USD 50–80 Mn (est.)	Premium classical formulations, wellness	International premium positioning
 Kerala Ayurveda Ltd.	~USD 30–40 Mn (est.)	Classical formulations, wellness, exports	First Ayush company to receive a US patent for a proprietary herbal formulation
 Vicco Laboratories	USD 80–80 Mn (est.)	Herbal oral care, skincare (turmeric-based)	Niche dominance in Western India herbal oral care
 Amrutanjan Healthcare	USD 40–50 Mn (est.)	Herbal pain management, OTC	Strong in South India
 Organic India / Fabindia	USD 50–70 Mn (est.)	Organic herbs, teas, nutraceuticals	Fast-growing premium and export segment
 New-age D2C players (Kapiva, Vedix, Zistto, The Ayurveda Co.)	USD 10–50 Mn (Individually)	Personalised Ayurveda, D2C digital-first	E-commerce penetration crossed 25% of sector sales in 2024; growing at 15.68% CAGR

Chapter:3

Pillar 2: Export Expansion: Unlocking Ayush's Global Opportunity

3.1 Export Expansion: Unlocking Ayush's Global Opportunity

Exports represent one of the significant and underleveraged growth opportunities within the Ayush ecosystem in India. Despite India's position as the global origin of Ayurveda, Yoga, and several traditional medicine systems, Ayush product exports remain modest relative to the size of the global herbal, nutraceutical, wellness, and traditional medicine markets. This presents a substantial opportunity for India to expand its global footprint and capture a larger share of the rapidly growing international demand for natural, preventive, and holistic healthcare solutions.

Achieving the Vision 2030 export ambition will require a strategic shift from exporting primarily raw materials and low-value products towards high-value, branded, standardized, and clinically validated Ayush formulations. Building a globally recognized "Brand India Ayush" will be critical to enhancing trust, differentiation, and premium positioning in international markets.

At the same time, India's unique traditional formulations, medicinal plant resources, and region-specific wellness practices must be protected and promoted through mechanisms such as Geographical Indication (GI) tagging,

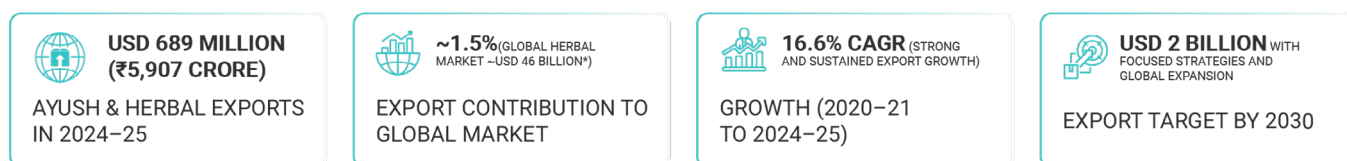
certification frameworks, and quality assurance systems. These interventions can strengthen authenticity, improve market recognition, and create premium export opportunities in regulated markets across North America, Europe, East Asia, and the Middle East.

Beyond products, the globalisation of Ayush presents a parallel opportunity in services exports. Areas such as tele-consultations, practitioner training, digital wellness programmes, integrative healthcare services, wellness tourism, and international education have the potential to emerge as significant export categories in their own right. Unlike physical products, these service segments require distinct policy support, regulatory frameworks, digital infrastructure, and international partnerships to scale effectively¹⁴.

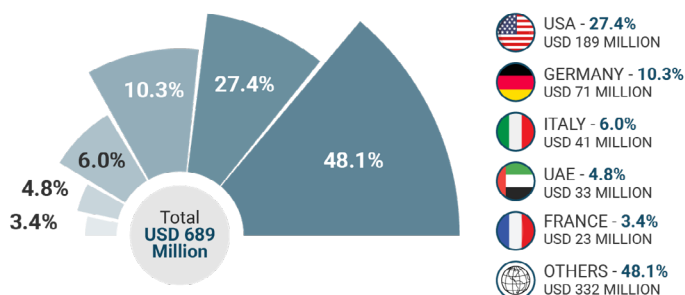
Export Target: USD 2 Billion by 2030

driven by a strategic shift from raw materials to high-value, clinically validated formulations.

Top Export Markets in 2024–25 & the Opportunity Ahead



Top Export Markets for Indian Ayush & Herbal Products (2024–25)



The Gap: Current Performance & Export Potential



BUILD GLOBAL BRAND

- Strengthen 'Brand India Ayush' with quality, safety & efficacy.
- Position India as a trusted source for natural health solutions.

EXPAND GLOBAL PRESENCE

- Target high-growth markets in North America, Europe, Middle East, Latin America & Africa.
- Strengthen participation in global trade shows & exhibitions.

LEVERAGE INNOVATION & R&D

- Invest in product innovation, standardization & clinical validation.
- Develop high-value, science-backed herbal formulations.

ENSURE QUALITY & COMPLIANCE

- Adhere to international quality standards & certifications.
- Strengthen traceability, safety and regulatory compliance.

FACILITATE TRADE & INVESTMENT

- Simplify export processes and reduce trade barriers.
- Encourage investments in cultivation, processing & value addition.

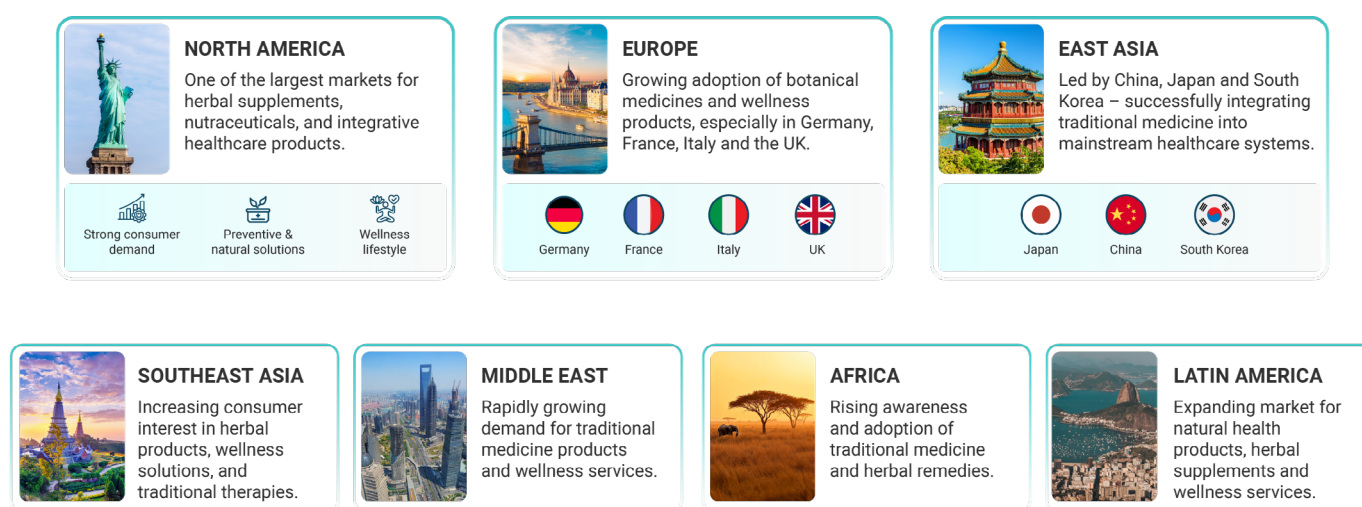
3.2 Global Market Landscape for Traditional Medicine

The global traditional medicine market has emerged as one of the fastest-growing segments within the broader healthcare and wellness economy. Driven by increasing consumer preference for natural therapies, rising prevalence of chronic diseases, growing awareness of preventive healthcare, and escalating healthcare costs, traditional

medicine systems are gaining acceptance across both developed and emerging economies. The global market for traditional medicine, herbal products, nutraceuticals, and complementary healthcare is estimated to be worth several hundred billion dollars and is projected to continue expanding at a robust pace over the coming decade.

Global Growth Of Traditional Medicine

Key Regions Driving Demand for Herbal & Wellness Solutions



The competitive landscape is currently dominated by countries that have successfully combined traditional knowledge with modern research, quality assurance, branding, and export-oriented manufacturing. China has established itself as the global leader in traditional medicine exports through strong institutional support, scientific validation, and integration of Traditional Chinese Medicine (TCM) into healthcare systems across country. Several European and North American companies have also built substantial market positions in herbal medicines, nutraceuticals, and natural health products through strong regulatory compliance, clinical evidence, and global branding strategies^{15 16}.

The global traditional medicine landscape is undergoing a structural transformation, with demand accelerating across mature markets such as North America and Europe and rapidly expanding across Asia, the Middle East, Latin America, and Africa. Together, these regions represent a

multi-hundred-billion-dollar opportunity spanning herbal medicines, nutraceuticals, wellness products, integrative healthcare, medical value travel, and digital health services. As the world's largest repository of traditional medical knowledge and one of the largest producers of medicinal plants, India is uniquely positioned to become the preferred global supplier of trusted traditional medicine products and services. Strengthening international market access, scientific validation, regulatory harmonization, and the global positioning of Brand Ayush will be critical to unlocking this opportunity and establishing India as a global leader in traditional medicine by 2030. Against this backdrop, India possesses a unique and differentiated advantage. The convergence of traditional knowledge, growing manufacturing capabilities, scientific advancements, wellness tourism, and increasing international recognition of Ayush systems creates a substantial opportunity for India to emerge as a global leader in traditional medicine, preventive healthcare, and wellness by 2030.

3.3 India's Current Export Position and Challenges

Over the past decade, India has steadily strengthened its presence in the global market for traditional medicine, herbal products, nutraceuticals, and wellness solutions. Rising global interest in natural healthcare, preventive medicine, plant-based products, and holistic wellness has created a favourable environment for the expansion of Ayush exports. India possesses a unique competitive advantage rooted in centuries of documented knowledge, rich biodiversity, and a large manufacturing base. India's exports of Ayush and herbal products have increased from approximately USD 540 million in FY 2020–21 to nearly USD 689 million in FY 2024–25, registering sustained growth over the period.

India's export story in Ayush is less about current market share and more about the scale of the opportunity ahead. While the country has established a growing presence in global herbal and traditional medicine markets, existing exports represent only a fraction of the potential that can be unlocked through value addition, branding, standardisation, and international market expansion. With unparalleled strengths in traditional knowledge, medicinal plant diversity, manufacturing capability, and wellness expertise, India is uniquely positioned to become a global hub for Ayush products and services. The gap between current exports and future potential therefore represents one of the most significant growth opportunities.

The challenge, therefore, is not the absence of demand, but India's ability to capture a larger share of global value chains.

3.4 The Structural Export Challenge

India's export portfolio is supported by a strong foundation of medicinal plants, herbs, and botanical extracts, reflecting the country's rich biodiversity and longstanding expertise in traditional medicine. As global demand for natural health products continues to grow, the next phase of export expansion presents a significant opportunity to move further up the value chain through high-value finished formulations, branded Ayush products, proprietary medicines, nutraceuticals, and evidence-based wellness solutions.

In key international markets such as the United States, Africa and the European Union, Indian Ayush products have already established a presence across dietary supplements,

botanical extracts, and wellness categories. Building on this foundation, there is substantial potential to expand into premium healthcare and therapeutic segments through enhanced scientific validation, quality standardisation, and stronger brand positioning. Such a transition would enable India to capture significantly greater value across the global traditional medicine ecosystem while reinforcing its position as the global leader in Ayush^{17 18 19 20 21}

3.5 Realising India's Full Export Potential

While global demand for traditional medicine, herbal products, nutraceuticals, and wellness solutions continues to expand rapidly, unlocking the next phase of Ayush export growth will require focused interventions across quality, market access, research, branding, and ecosystem development. India possesses all the core strengths necessary to become a global leader in Ayush exports; however, realizing this

opportunity will depend on strengthening the enabling environment that supports scale, competitiveness, and international acceptance. The following areas represent the key strategic priorities that can accelerate India's transition from a growing exporter of Ayush products to a global powerhouse in traditional medicine and wellness.

Key Challenges Limiting Ayush Export Growth

The expansion of Ayush exports is constrained by regulatory, commercial, and ecosystem-level challenges.



THE OPPORTUNITY AHEAD

The global traditional medicine, herbal products, nutraceuticals, and wellness economy is valued at several hundred billion dollars and continues to expand rapidly. India has all the strengths to become a global leader in Ayush exports.



Strategic Transition for the Next Phase of Export Growth



3.6 The Raw Material Trap: Volume vs. Value

India possesses one of the world's richest medicinal plant ecosystems and is a leading producer of several high-demand herbs used in traditional medicine, nutraceuticals, cosmetics, and wellness products. India producing a dominant share of several globally traded botanicals, including Ashwagandha (85–90% of global supply), Giloy (~90%), Brahmi (~85%), Turmeric (~80%), Isabgol (~80%), Shatavari (~80%), and Moringa (~80%). Despite this resource strength, a significant proportion of exports continue to comprise raw herbs, dried botanicals, powders, and intermediate extracts, resulting in limited value realisation and weaker global brand recognition. In contrast, international demand is increasingly shifting towards standardized extracts, nutraceuticals, botanical ingredients, functional foods and beverages,

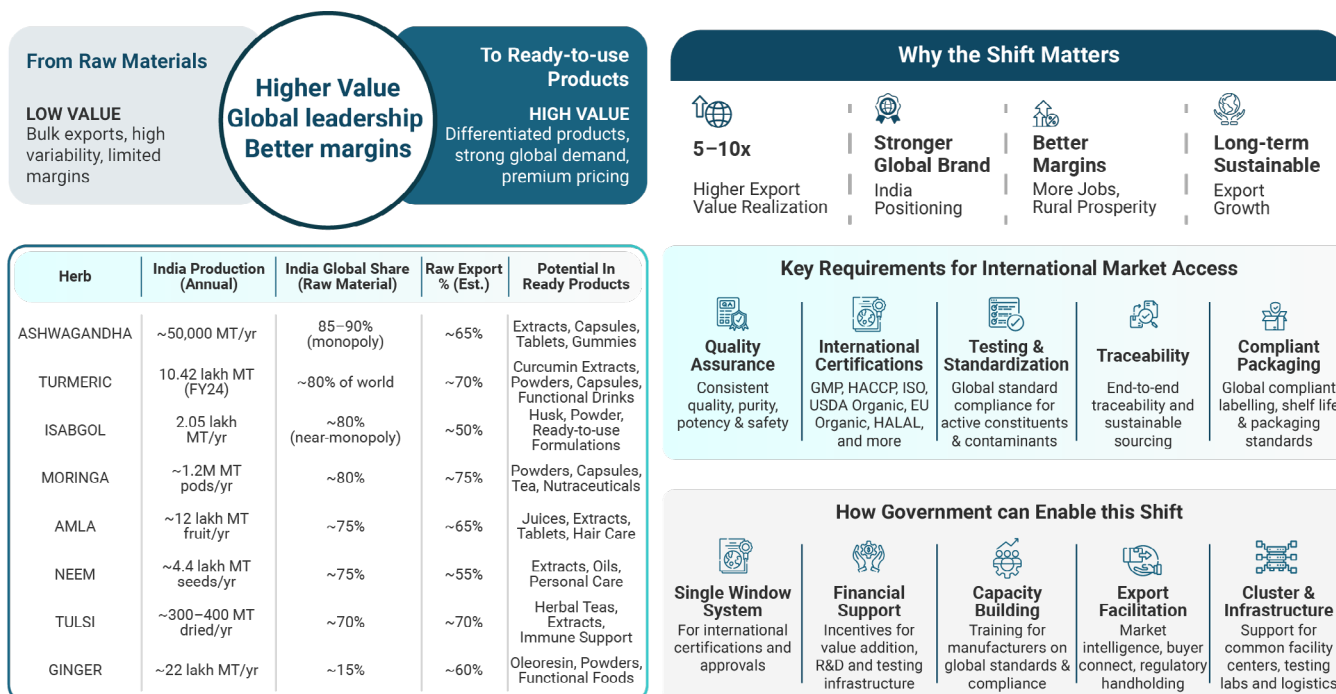
herbal cosmetics, evidence-based formulations, and ready-to-use healthcare products, which command substantially higher prices and create greater economic value.

The greater economic opportunity lies in moving up the value chain from exporting raw materials to producing standardized extracts, branded formulations, nutraceuticals, therapeutic products, and wellness solutions. At each stage of processing, the value of a medicinal plant can increase several-fold through scientific validation, quality assurance, formulation development, packaging, branding, and market positioning.

The future of Ayush exports lies not in exporting greater volumes of herbs, but in exporting greater value through innovation, standardisation, branding, and finished products.

Shift From Raw To Ready: The Catalyst For Ayush Export Growth

India's superior raw material strength can unlock exponential export potential with a strategic shift towards value-added, ready-to-use products.



Transitioning from raw material exports to high-value finished products represents one of the largest opportunities for accelerating India's Ayush export growth. Such a shift would enhance export earnings, strengthen domestic manufacturing, generate skilled employment, increase farmer incomes through value addition, and establish India's Ayush system as a trusted global benchmark for quality traditional medicine. Realizing this opportunity will require a supportive ecosystem that strengthens quality assurance, international certifications (such as GMP, HACCP, ISO, USDA Organic, EU Organic, HALAL, and other market-specific requirements), product standardisation, traceability, and regulatory compliance.

The strategic opportunity for India is therefore not simply to export more medicinal plants, but to capture a larger share of the value chain. By transitioning from a raw-material supplier to a global producer of high-value Ayush products and solutions, India can significantly enhance export competitiveness while accelerating progress towards the \$213 billion Ayush Vision.

The future of Ayush exports lies not in exporting greater volumes of herbs, but in exporting greater value through innovation, standardisation, branding, and finished products.

3.7 Brand India for Ayush: Trust, Authenticity and Global Recognition

As global demand for traditional medicine and natural health products continues to grow, trust and authenticity will become key differentiators in international markets. There is a significant opportunity to establish a unified and globally trusted "Brand India Ayush" that assures quality, safety, efficacy, and authenticity.

Building a globally trusted brand of India's Ayush systems will be critical to expanding India's presence in international markets. While India's traditional medicine systems enjoy strong global recognition, sustained export growth will increasingly depend on internationally accepted quality standards, regulatory compliance, and consumer confidence.

A unified Authentic India Ayush Mark, supported by Geographical Indication (GI) protection, globally recognized certification frameworks, robust traceability, and scientific quality assurance, can differentiate Indian Ayush products in competitive markets. Together, these initiatives will strengthen brand credibility, enable premium positioning,

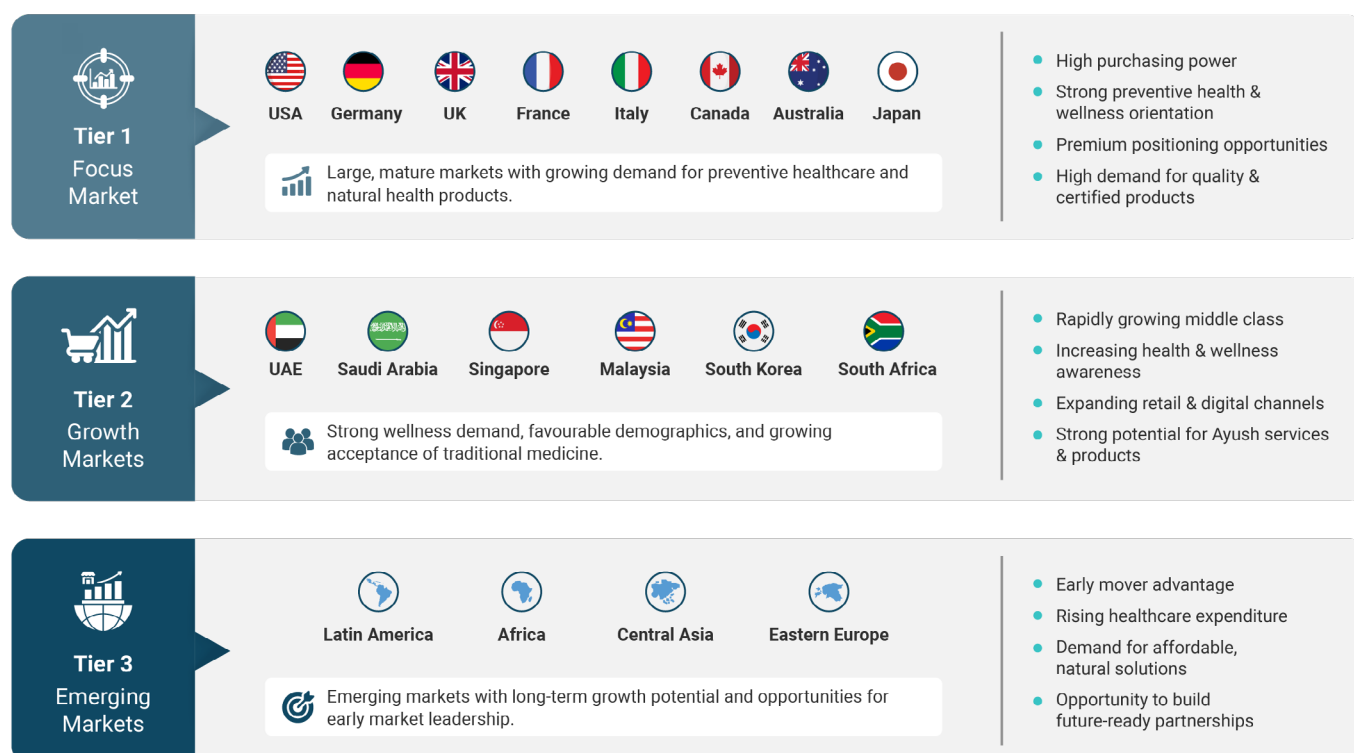
facilitate regulatory acceptance, and accelerate the transition of India from a supplier of traditional products to the world's most trusted source of high-quality Ayush products and services.

3.8 Export Targets and Market Prioritisation

Achieving the Vision 2030 ambition of \$2 billion in Ayush exports will require a focused strategy that prioritise high-growth product categories and high-potential international markets. Rather than relying solely on traditional exports of medicinal plants and herbal extracts, the next phase of growth should be driven by value-added products, branded formulations, wellness services, nutraceuticals, and evidence-backed healthcare solutions.

From a segment perspective, the largest export opportunities are expected to emerge from Ayush medicines and formulations, nutraceuticals and wellness products, herbal extracts, personal care products, and wellness services, including tele-consultations, practitioner training, and wellness tourism. These segments offer significantly higher value realisation and stronger global demand than raw material exports.

Market Prioritisation Three Tier Strategy



By 2030, India's export basket should progressively transition from raw materials towards higher-value formulations, branded products, and healthcare services. This shift will not only increase export earnings but also strengthen India's global positioning as the leading source of authentic Ayush products and wellness solutions.^{22 23} The objective for 2030

is not merely to export more products, but to export more value. Success will depend on building globally trusted brands, expanding presence in regulated markets, and positioning Ayush as a premium healthcare and wellness offering rather than a commodity-based export category.

≡ 3.9 Policy Enablers and Recommendations

Achieving the Vision 2030 export ambition will require a strong policy ecosystem that enables Indian Ayush products and services to compete effectively in global markets. While demand for natural health products and traditional medicine continues to grow worldwide, market access is increasingly determined by regulatory compliance, trade facilitation, scientific validation, and institutional support.

A key priority should be the integration of Ayush within India's broader trade and economic diplomacy agenda. Ongoing and future Free Trade Agreements (FTAs) with major markets such as the United Kingdom, European Union, Australia, UAE, and GCC countries provide opportunities to improve market access, reduce tariff and non-tariff barriers, and secure recognition of Ayush products and services. In parallel, India would actively pursue Mutual Recognition Agreements (MRAs) and regulatory cooperation mechanisms to facilitate acceptance of Ayush standards and certifications in international markets.

Regulatory facilitation will be equally important. Dedicated support mechanisms for international product registration,

export certification, quality compliance, and regulatory intelligence can help Indian manufacturers navigate complex market-entry requirements. Establishing Ayush Export Facilitation Cells and country-specific regulatory support desks can significantly reduce the time and cost associated with entering regulated markets.

To accelerate global expansion, targeted market entry support programmes should be developed for exporters, particularly MSMEs. These may include international branding initiatives, participation in global trade fairs, support for clinical validation studies, digital export platforms, and strategic partnerships with international distributors, healthcare institutions, and wellness providers.

The next years of Ayush export growth will be driven not only by product competitiveness but also by policy-enabled market access. India will successfully combine trade diplomacy, regulatory alignment, and global branding and will be best positioned to capture a larger share of the rapidly expanding traditional medicine economy.



Chapter:4

Pillar 3: Service Sector Integration with Mainstream Healthcare

The integration of Ayush into the modern healthcare system represents one of the most transformative opportunities to strengthen India's healthcare delivery while expanding the reach and impact of traditional medicine. Moving beyond its predominantly wellness-oriented role, Ayush can contribute across the continuum of care including preventive, promotive, curative, rehabilitative, and palliative health services through evidence-based integrative healthcare models. Embedding Ayush within hospitals, primary healthcare facilities, and multidisciplinary care teams, supported by standardized clinical protocols, referral pathways, interoperable digital health systems, and collaborative practice between Ayush and allopathic practitioners, can improve patient outcomes, expand treatment choices, and enhance the efficiency and resilience of the health system.

India has already taken important steps towards this vision through the establishment of Integrated Ayush Departments

in hospitals, the development of Integrated Health Research initiatives, the promotion of co-location of Ayush services under the National Ayush Mission, and collaborations between premier institutions such as the All India Institute of Ayurveda (AIIA) and leading medical institutions. Scaling these initiatives through stronger clinical evidence, standardized treatment guidelines, multidisciplinary capacity building, digital integration under the Ayushman Bharat Digital Mission, and supportive financing mechanisms can establish Ayush as an integral component of India's modern healthcare system. Such integration will not only improve access to holistic and patient-centred care but also create sustained demand for Ayush services, strengthen health system resilience, and position India as a global leader in integrative healthcare.

4.1 The Integration Imperative

The integration of Ayush into India's mainstream healthcare system is no longer an aspirational objective but it is a strategic healthcare necessity. India faces a rising dual burden of non-communicable diseases (NCDs), including diabetes, hypertension, obesity, cardiovascular disorders, and mental health conditions, alongside persistent communicable disease challenges in underserved populations. While modern medicine remains indispensable for acute and emergency care, the growing need for preventive healthcare, chronic disease management, lifestyle modification, and rehabilitative care creates a significant opportunity for Ayush systems to play a larger role.

This integration must operate across three mutually reinforcing dimensions: first, the co-location of Ayush services within public health infrastructure; second, the inclusion of Ayush therapies within public and private insurance coverage; and third, the adoption of standardized, evidence-based treatment protocols that enable Ayush practitioners to participate more effectively within India's formal healthcare delivery ecosystem.

4.2 Ayushman Arogya Mandirs and Public Health Infrastructure

The Ayushman Arogya Mandir (AAM) programme represents one of the most significant public health infrastructure platforms for scaling Ayush service delivery across India. As the frontline of India's primary healthcare architecture, AAMs are designed to deliver comprehensive, community-based healthcare services closer to people's homes, with a strong focus on preventive, promotive, and holistic care.

The integration of Ayush practitioners and therapies within the AAM network provides a powerful opportunity to institutionalize Ayush at scale. Through this, India can strengthen preventive care, early intervention, chronic disease management, wellness promotion, and community-level healthcare access, particularly in rural and underserved regions.

Beyond expanding healthcare access, AAMs can also serve as the foundational platform for Ayush as part of mainstream healthcare delivery. The continued expansion of Ayush services within this network, supported by digital health integration, standardized treatment protocols, and referral linkages with secondary and tertiary care systems, can significantly strengthen India's vision of integrated and people-centric healthcare.

1,75,000+

Ayushman Arogya Mandirs are operational, serving as the frontline for scaling Ayush service delivery across India.

Ayush Public Health Integration

Key Metrics (2024–25)



The strategic priority for 2026–2030 is to accelerate the deployment of Ayush practitioners across the remaining AAM network, particularly in aspirational districts, tribal regions, and underserved geographies facing acute

healthcare workforce shortages. Expanding Ayush presence within these regions can significantly strengthen primary healthcare access and community-level preventive care at scale.²⁴

4.3 Ayush under AB-PMJAY

The Ayushman Bharat Pradhan Mantri Jan Arogya Yojana (AB-PMJAY), the world's largest government-funded health insurance scheme covering over 55 crore beneficiaries, represents one of the most transformative policy platforms for mainstreaming Ayush at scale. Integrating Ayush therapies within PM-JAY has the potential to significantly expand affordability, accessibility, and institutional adoption of Ayush services across India.

While integration has begun, the current coverage remains limited and uneven. At present, CGHS has empanelled 54 Ayush Day Care Therapy Centres in Delhi/NCR and 45 Ayush In-Patient Healthcare Organisations (HCOs) nationwide, offering approved Ayurveda, Yoga & Naturopathy, Unani, and Siddha treatments for beneficiaries.²⁵ Expanding Ayush package integration within PM-JAY can significantly increase reach, strengthen preventive and chronic care delivery, and position Ayush as a mainstream component of India's public healthcare system.

4.4 Private Health Insurance Integration

Private health insurance in India, covering approximately 33.5 crore lives through employer group schemes (~27.5 crore) and individual policies (~6 crore), has historically provided limited coverage for Ayush therapies. When combined with government schemes like Ayushman Bharat PM-JAY (~24.5 crore beneficiaries), total health insurance coverage in India reaches approximately 58 crore lives. The IRDAI's January 2024 mandate (effective April 2024) marked a major policy shift by requiring insurers to include Ayush coverage within retail health insurance products without limitations, bringing Ayush into the formal insured healthcare ecosystem at scale²⁶.

Just as insurance accelerated the growth of modern healthcare by creating predictable and large-scale demand, Ayush insurance integration has the potential to mainstream traditional medicine across India's healthcare economy. The immediate priority now is to standardize treatment packages, reimbursement frameworks, and empanelment norms to create a scalable, transparent, and outcome-driven insurance ecosystem. The MoU between the All India Institute of Ayurveda (AIIA) and the General Insurance Council enabling cashless Ayurveda treatment at authorized facilities represents an important model for future nationwide integration.

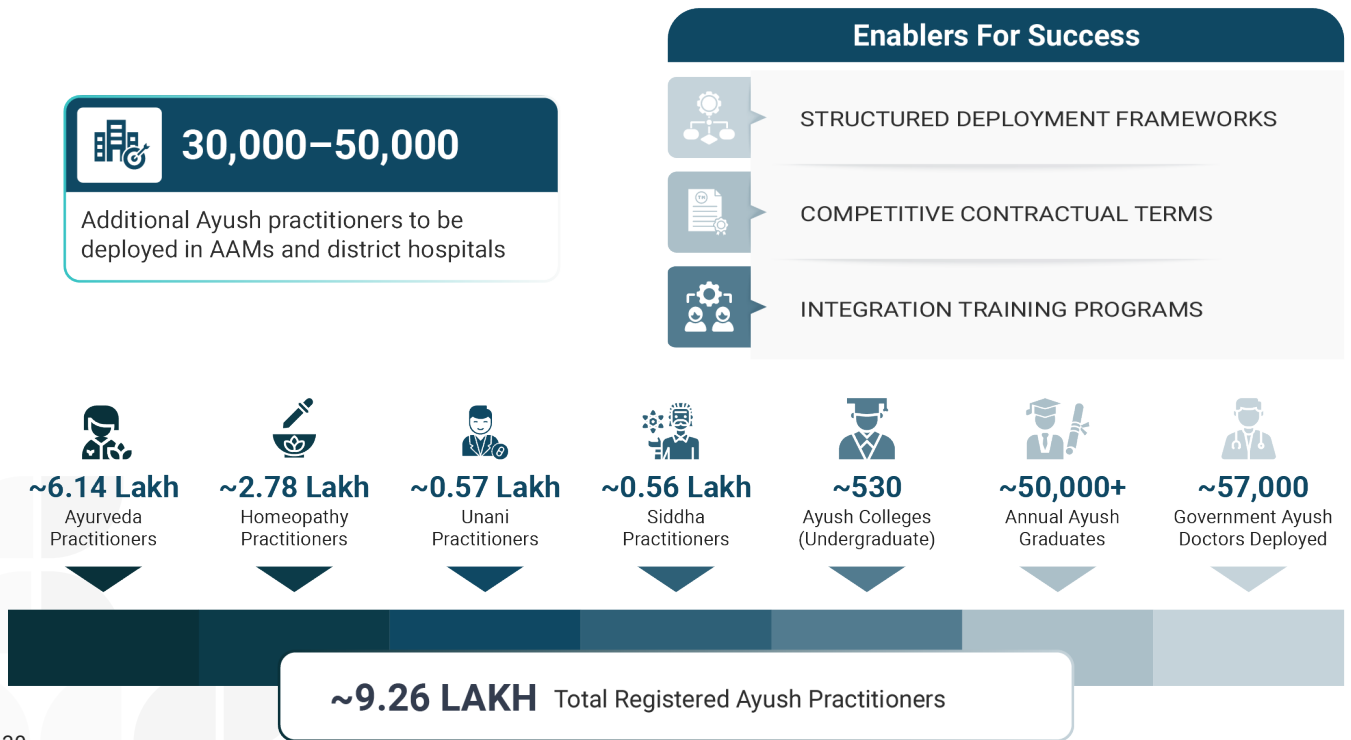
An April 2024 IRDAI mandate requires insurers to include Ayush coverage within retail health insurance products without limitations, bringing Ayush into the formal insured healthcare ecosystem at scale.

4.5 Workforce Capacity: Practitioners and Deployment

India has one of the world's largest traditional medicine workforces, with over 9.26 lakh registered Ayush practitioners across systems. While this provides a strong foundation for healthcare expansion, the key priority is improving deployment across rural, tribal, and underserved regions where healthcare workforce shortages remain significant.

Strengthening rural deployment, clinical integration, and skill alignment through the National Ayush Mission and Ayush educational institutions will be critical to building a more accessible and future-ready healthcare ecosystem²⁷.

Ayush education and skill development constitute a critical pillar of India's healthcare economy and human capital ecosystem. Beyond producing qualified practitioners, the sector generates significant economic value through higher education, professional training, research, continuing medical education, certification programmes, and allied skill development. With over 1.2 lakh students enrolling annually across undergraduate, postgraduate, doctoral, diploma, and certificate programmes, the Ayush education ecosystem is projected to grow into a USD 0.6 billion market by 2030,



supported by rising demand for skilled professionals across healthcare delivery, manufacturing, wellness, research, and global markets. Continued investments in education, faculty development, digital learning, competency-based skilling,

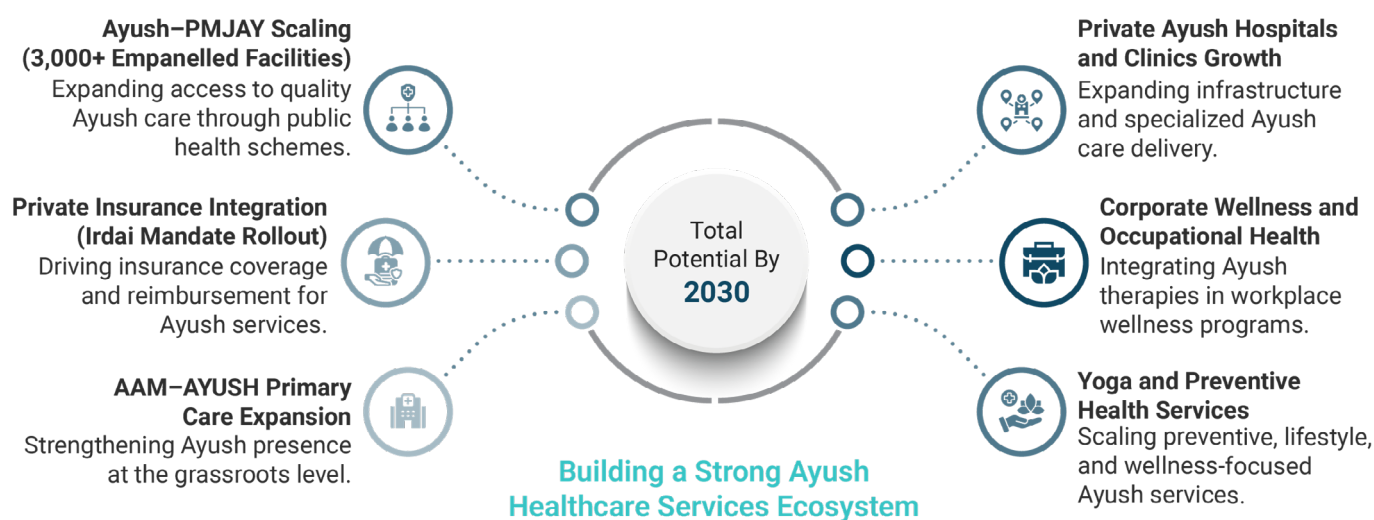
and international collaborations will strengthen India's talent pipeline while enhancing the sector's contribution to healthcare transformation, employment generation, and economic growth.

4.6 Pathway to a USD 99 Billion Ayush Healthcare Services Economy

The Ayush healthcare services sector all-embracing clinical consultations, therapeutic care, institutional healthcare, wellness services, digital health, and community-based health programmes expanded from USD 21.5 billion in 2022 to approximately USD 26 billion in 2024, reflecting a robust 20.9% CAGR. Building on this strong growth trajectory, the sector has the potential to evolve into a USD 99 billion healthcare services economy by 2030, provided growth accelerates to approximately 25% annually through targeted policy reforms and strategic investments.

This transformation will be driven by the large-scale integration of Ayush into India's public and private healthcare

systems, expansion of Ayush hospitals and wellness centres, wider insurance coverage and reimbursement, mainstream adoption of evidence-based integrative care, digital health-enabled service delivery, strengthened preventive and chronic disease management programmes, and the rapid growth of medical value travel and wellness tourism. Investments in workforce development, quality assurance, accreditation, clinical research, and digital infrastructure will further enhance service quality, accessibility, and consumer confidence. Collectively, these interventions position Ayush healthcare services as a major driver of India's healthcare transformation while contributing significantly to employment generation, investment, and economic growth.²⁸



4.7 Policy Enablers and Strategic Recommendations

Realising the vision of Ayush as a mainstream pillar of India's healthcare system and a key contributor to a USD 99 billion healthcare services economy by 2030 will require a comprehensive policy and institutional reform agenda. While consumer demand and government support have accelerated sectoral growth, the next phase must focus on integrating Ayush into the core architecture of

healthcare delivery, financing, regulation, and digital health. A coordinated, whole-of-government approach involving the Ministry of Ayush, Ministry of Health & Family Welfare, NITI Aayog, IRDAI, National Health Authority, State Governments, regulators, academia, and the private sector will be essential to unlock the sector's full economic and public health potential.

4.8 Strategic Policy Priorities



Accelerate Integration into Public Healthcare

Institutionalise Ayush across primary, secondary, and tertiary healthcare through co-location, multidisciplinary care teams, referral pathways, and integrative clinical models under the National Health Mission and Ayushman Bharat.



Strengthen Healthcare Infrastructure

Expand Ayush hospitals, integrated wellness centres, centres of excellence, specialty clinics, and tele-Ayush platforms, particularly in underserved and aspirational districts, while promoting public-private partnerships to enhance service availability and quality.



Standardise Clinical Practice and Quality

Develop nationally standardised clinical practice guidelines and treatment protocols for high-burden diseases including diabetes, hypertension, arthritis, musculoskeletal disorders, PCOS, anxiety, mental health, and geriatric care, supported by robust evidence generation and real-world outcome monitoring.



Accelerate Digital Transformation

Integrate Ayush providers within the Ayushman Bharat Digital Mission (ABDM) through interoperable electronic health records, e-prescriptions, telemedicine, AI-enabled clinical decision support, digital referrals, and health information exchange to improve continuity and quality of care.



Strengthen Governance and Regulatory Coordination

Establish a national coordination mechanism to align policy, financing, regulation, digital health, workforce planning, and service delivery across ministries and states, supported by measurable performance indicators and periodic monitoring.



Expand Health Financing and Insurance Coverage

Fast-track Ayush integration under AB-PMJAY through dedicated empanelment pathways, standardized benefit packages, simplified onboarding, and outcome-based reimbursement mechanisms.

Operationalise the IRDAI Ayush mandate through uniform treatment packages, digital claims processing, insurer guidelines, and reimbursement frameworks to improve affordability and utilization.



Build a Future-Ready Ayush Workforce

Scale workforce deployment under the National Ayush Mission through competency-based education, continuous professional development, multidisciplinary clinical training, rural service incentives, and international certification programmes to meet growing domestic and global demand.



Strengthen Quality Assurance and Accreditation

Establish a unified national accreditation and quality assurance framework aligned with NABH, NABL, and internationally recognized standards such as JCI, supported by periodic quality audits, digital compliance systems, patient safety standards, and performance benchmarking.



Promote Research, Innovation and Evidence Generation

Strengthen multicentric clinical trials, implementation research, health technology assessment, pharmacovigilance, and real-world evidence to enhance clinical credibility, facilitate insurance coverage, and support global acceptance of Ayush interventions.

The next phase of Ayush growth will be determined not only by increasing public acceptance, but by the depth of institutional integration across India's healthcare ecosystem. Policy reforms that align healthcare financing, service delivery, workforce development, digital health, quality assurance, and evidence generation will enable Ayush to transition from a complementary system to a mainstream component of universal healthcare. By embedding Ayush within national health priorities and strengthening public-private collaboration, India can build a resilient, patient-centred, and globally competitive healthcare ecosystem unlocking a USD 99 billion healthcare services economy by 2030, creating millions of skilled jobs, attracting domestic and international investment, and reinforcing India's position as the global leader in traditional and integrative medicine.

Chapter:5

Pillar 4: Wellness Tourism & Medical Value Travel

Wellness tourism represents one of Ayush's most globally scalable growth opportunities. Already estimated at approximately \$19.4 billion²⁹ in India, the sector has the potential to expand to \$30–35 billion by 2030 through the development of integrated Ayush wellness circuits, destination-based healing ecosystems, and a globally competitive Medical Value Travel framework. This positions India not merely as a tourism destination, but as the world's leading hub for authentic, preventive, and evidence-informed traditional wellness.

The global wellness economy is approaching USD 10 trillion. Wellness (USD 6.8 trillion) now surpasses other global mega-industries, including sports (USD 2.7 trillion), tourism (USD 5 trillion), the green economy (USD 5.1 trillion), and IT (USD 5.3 trillion). It is almost four times the size of the pharmaceutical industry (USD 1.8 trillion) and accounts for 60% of total global health expenditure (USD 11.2 trillion). The Global Wellness Institute forecasts that wellness will comprise 7.1% of global GDP by 2029, up from 6.1% in 2024³⁰.

5.1 Global Wellness Tourism Landscape and India's Competitive Advantage

The global wellness tourism market is experiencing rapid growth, driven by increasing demand for preventive healthcare, holistic well-being, healthy ageing, stress management, and nature-based healing experiences. India is uniquely positioned to capitalise on this opportunity through its centuries-old Ayush systems, diverse wellness traditions, and globally recognised expertise in Ayurveda, Yoga, Siddha, Unani, Sowa-Rigpa, and Naturopathy. India ranked 10th in the Medical Tourism Index (MTI), combines authentic healing systems with robust healthcare infrastructure, internationally accredited hospitals, skilled healthcare professionals, cost-effective services, rich biodiversity, and a strong cultural and spiritual heritage. Supported by flagship initiatives such as Heal in India and Heal by India, India is well positioned to emerge as a leading global destination for wellness tourism and integrative healthcare, making wellness and medical value travel a significant driver of the country's USD 213 billion Ayush economy by 2030.

Global wellness tourism is among the fastest-growing segments of the international travel economy, valued at

approximately \$651 billion in 2022 and projected to exceed \$1.4 trillion by 2027³¹. Wellness travelers spend significantly more per trip than conventional tourists, making the segment a strategic high-value opportunity for destination economies.

The global wellness economy is approaching USD 10 trillion, making it almost four times the size of the pharmaceutical industry.

The post-pandemic period has accelerated a structural shift in global travel behaviour, with preventive health, mental well-being, rejuvenation, and holistic healing emerging as key travel motivations. In this evolving landscape, India holds a uniquely differentiated advantage. As the origin of Ayurveda and Yoga, supported by centuries of traditional healing knowledge, rich biodiversity, and globally recognised wellness practices, India is uniquely positioned to emerge as the world's leading destination for authentic and evidence-informed wellness tourism.

5.2 Regional Medical Hubs and Budget Initiatives

The Union Budget 2026–27 proposed the development of five Regional Medical Hubs in partnership with the private sector to position India as a leading global destination for medical and wellness tourism³². These integrated hubs will combine advanced healthcare, research, education, rehabilitation, and dedicated Ayush Centres under a unified

Medical Value Travel framework³³. Strategically located across India's major Ayush corridors will offer internationally benchmarked patient services, including multilingual support, insurance facilitation, digital health, and end-to-end wellness experiences.

Complementing this initiative, the Ayush Visa, now available to citizens of over 130 countries, has created a dedicated pathway for international wellness travellers. Together, these initiatives are expected to accelerate foreign patient inflows, increase healthcare exports, attract private investment, generate employment, and strengthen India's position as

a preferred global destination for integrative healthcare. Continued investments in international branding, digital patient facilitation, quality accreditation, and the Heal in India initiative will be critical to unlocking the full potential of wellness tourism as a key driver of India's USD 213 billion Ayush economy by 2030^{34 35}.

5.3 Pathway to a USD 30–35 billion Wellness Tourism Economy by 2030

India's Ayush wellness tourism and medical value travel segment, currently estimated at approximately \$19.4 billion³⁶, has the potential to expand to \$30–35 billion by 2030. Given the global wellness tourism market is projected to grow at 12–15% annually, this target is both realistic and strategically achievable with focused policy execution and institutional support. India enters this opportunity with a unique global advantage i.e. authentic wellness systems rooted in Ayurveda and Yoga, combined with cost competitiveness, clinical expertise, spiritual tourism, and rising international demand for preventive and holistic healthcare.

India's Ayush wellness tourism and Medical Value Travel (MVT) sector is poised for significant expansion, supported by strong global demand for preventive and integrative healthcare and a series of transformative government initiatives. In 2025, India is estimated to receive 9.95 million foreign tourist arrivals (FTAs), including approximately 644,000 medical value travellers, of which nearly 7% (around 46,000 patients) are estimated to seek Ayush-based treatments and wellness services. Looking ahead, if

India achieves its tourism vision of 25 million FTAs by 2030 while maintaining a similar share of medical travellers, the country could attract around 1.75 million foreign patients annually. Assuming 10% of these patients opt for Ayush-based therapies including Ayurveda, Yoga, Panchakarma, Siddha, Naturopathy, and integrative wellness programmes, India could receive approximately 175,000 international Ayush patients each year. With a minimum average patient expenditure of USD 5,000–7,000, combined with spending on accommodation, wellness packages, local transport, and allied tourism services, the Ayush Medical Value Travel segment has the potential to generate an estimated USD 1.2 billion in annual economic value by 2030. This growth will be further accelerated by initiatives such as the Ayush Visa, Heal in India, the development of Regional Medical Hubs, expanding international accreditation, and integrated digital patient facilitation, positioning wellness tourism as a high-value export sector and an important contributor to India's Ayush economy.

Achieving this vision will depend on three critical enablers:

Internationally benchmarked accreditation and quality standards for Ayush wellness facilities;

Wider international insurance recognition and acceptance of Ayush therapies delivered in India.

A government-backed integrated Ayush medical value travel platform to streamline the global patient journey;

The opportunity for India is not merely to attract more tourists, but to establish itself as the world's most trusted destination for holistic healing, preventive healthcare, and wellness-led medical value travel.

5.4 Policy Enablers and Strategic Recommendations

Realising the vision of a USD 30–35 billion wellness tourism, USD 1.2 billion Ayush Wellness Medical Value Travel ecosystem by 2030 will require a coordinated national strategy that integrates healthcare, tourism, Ayush, digital infrastructure, investment promotion, and international

partnerships. India's competitive advantage lies not only in its authentic wellness traditions but in its ability to deliver world-class, evidence-based, and seamless wellness experiences. The following strategic priorities will accelerate India's emergence as the global capital of wellness tourism.

5.4.1

Develop Integrated Ayush Wellness Tourism Circuits

Establish internationally branded Ayush Wellness Circuits linking Kerala, Uttarakhand, Goa, Karnataka, Tamil Nadu, Himachal Pradesh, Jammu & Kashmir, and the North-East as specialised wellness destinations. Integrate Ayurveda, Yoga, Siddha, Naturopathy, spiritual tourism, eco-tourism, local culture, and hospitality under a unified destination development framework.

5.4.2

Position India as the Global Brand for Authentic Wellness

Launch a coordinated "Heal in India through Aysuh" global branding campaign led jointly by the Ministries of Ayush and Tourism and External Affairs. Promote India as the world's preferred destination for preventive healthcare, healthy ageing, rehabilitation, mental wellness, and holistic healing through strategic international partnerships, digital marketing, roadshows, and participation in global wellness forums.

5.4.3

Create World-Class Wellness Infrastructure

Fast-track the development of the proposed Regional Medical Hubs while encouraging private investment in integrated wellness resorts, Ayush hospitals, destination wellness centres, eco-retreats, and wellness villages through viability gap funding, PPPs, and investment facilitation. Develop internationally benchmarked wellness infrastructure aligned with sustainability principles.

5.4.4

Establish a National Ayush Quality and Accreditation Framework

Introduce a globally recognised accreditation and certification system for Ayush hospitals, wellness centres, resorts, and practitioners aligned with NABH, JCI, and international wellness standards. A trusted quality assurance framework will enhance international credibility, improve patient confidence, and strengthen India's global competitiveness.

5.4.5

Expand International Partnerships and Insurance Recognition

Strengthen bilateral agreements with priority countries to promote cross-border healthcare, facilitate international insurance acceptance for Ayush therapies, encourage academic collaborations, and establish overseas referral networks. Expanding global reimbursement mechanisms will significantly increase international patient inflows.

5.4.6

Build a Digital Medical Value Travel Ecosystem

Develop an integrated National Ayush Medical Value Travel Platform that offers visa facilitation, provider discovery, multilingual support, appointment booking, digital health records, payment systems, travel planning, insurance assistance, teleconsultations, and post-treatment follow-up, creating a seamless end-to-end experience for international patients.

5.4.7

Foster Innovation, Skills and Community-Based Wellness Enterprises

Develop a globally competitive wellness workforce through specialised certification programmes for therapists, yoga professionals, wellness managers, interpreters, and hospitality professionals. Promote community-led wellness enterprises, traditional healing practices, medicinal plant tourism, and local wellness entrepreneurship to ensure inclusive growth and sustainable livelihoods.

India possesses an unparalleled combination of authentic traditional medicine systems, world-class clinical expertise, rich biodiversity, spiritual heritage, and rapidly expanding healthcare infrastructure. By integrating wellness tourism with healthcare, digital innovation, destination development, and global branding, India has the opportunity to move beyond being a preferred wellness destination to becoming the world's wellness capital. A coordinated national strategy anchored in quality, innovation, sustainability, and international partnerships will enable wellness tourism and Medical Value Travel to become a major healthcare export, generate high-value employment, attract global investment, strengthen regional economies, and serve as a cornerstone of India's USD 213 billion Ayush economy by 2030.

Chapter:6

Pillar 5: Research, Evidence & Digitalisation

Research, evidence generation, and digital infrastructure are the foundational enablers that will determine the success and scalability of the entire Ayush Vision 2030. The long-term mainstreaming of Ayush will depend not only on historical credibility, but on its ability to demonstrate scientific validation, measurable outcomes, interoperability, and digital integration within modern healthcare systems. Clinical trials, real-world evidence generation, pharmacovigilance systems, AI-enabled personalised care, and digitally connected healthcare platforms will be critical in transforming Ayush from a traditionally trusted system into a globally accepted evidence-informed healthcare ecosystem.

India is uniquely positioned to lead this transformation through its growing institutional ecosystem, including the WHO Global Traditional Medicine Centre (WHO-

GTMC) in Jamnagar, Gujarat, which represents a landmark global platform for advancing research, evidence, policy collaboration, and innovation in traditional medicine systems. The WHO-GTMC has the potential to significantly strengthen the international scientific credibility and policy positioning of Ayush globally.

Complementing this effort, the Ayush Grid is envisioned as the digital backbone of the ecosystem, integrating all systems into a unified digital health architecture. The platform is designed to strengthen healthcare delivery, research, education, telemedicine, digital health records, policy implementation, citizen access and create the technological foundation required to scale Ayush at a 21st-century global level³⁷.

6.1 The Credibility Gap and the Imperative for Evidence

One of the key barriers to the global mainstreaming of Ayush is the need for stronger evidence of safety, efficacy and quality. International regulators, insurers, healthcare systems, and medical institutions increasingly require robust clinical validation, real-world outcome data, and globally accepted research standards before therapies can achieve large-scale adoption, reimbursement, and regulatory acceptance.

Without strong scientific evidence, many Ayush products continue to be positioned internationally as wellness or dietary supplements rather than evidence-backed therapeutic solutions and significantly limiting both market access and value realisation.

Closing this gap is therefore a strategic priority, not merely a regulatory requirement. Clinical evidence generation, pharmacovigilance, peer-reviewed research,

and outcome-based validation will be essential to unlock insurance integration, global regulatory approvals, medical curriculum integration, and mainstream healthcare adoption.

The COVID-19 period demonstrated the sector's potential to generate global scientific interest through research on Ashwagandha, Giloy, Yoga, and immunity-focused interventions. The next phase must focus on institutionalizing this momentum through large-scale, randomized clinical trials and globally benchmarked evidence generation across high-burden chronic and lifestyle diseases.

The single largest barrier to the global mainstreaming of Ayush is not demand, but evidence of credibility

6.2 R&D Landscape and Investments

India has established one of the world's most comprehensive government-supported research ecosystems for traditional medicine, anchored by five autonomous research councils; Central Council for Research in Ayurvedic Sciences (CCRAS), Central council for Research In Homoeopathy (CCRH), Central Council for Research in Unani Medicine (CCRUM),

Central Council for Research in Yoga and Naturopathy (CCRYN), and Central Council for Research in Siddha (CCRS) which undertake fundamental, translational, clinical, and public health research across the Ayush systems. The research ecosystem is further strengthened through the Ayurgyan Scheme, Centres of Excellence, pharmacopoeial

standardisation, multicentric clinical trials, medicinal plant research, and strategic collaborations with premier institutions such as AIIMS, ICMR, IITs, IISc, NIMHANS, ILBS, Tata Memorial Centre, CDRI, and JNU. The Government has also established Integrated Ayush Departments in leading central hospitals, created Ayush–ICMR Advanced Centres for Integrative Health Research at AIIMS institutions, and constituted a high-level committee under NITI Aayog to develop a national framework for integrative healthcare.

Through the Ayurswasthya Yojana, financial support is being provided to nationally reputed institutions to develop Centres of Excellence that integrate Ayush with modern medicine, while collaborative research is expanding across priority areas such as cancer, diabetes, cardiovascular

diseases, women's and child health, mental health, geriatrics, liver diseases, and public health.³⁸ Recognising scientific evidence as the foundation for global acceptance, the Union Budget 2026–27 increased the allocation for the Ministry of Ayush to ₹4,408.93 crore, reinforcing investments in research infrastructure, clinical validation, innovation, quality standardisation, and evidence generation. Continued expansion of high-quality clinical research, international collaborations, digital research platforms, and WHO-aligned standards will be critical to strengthening the global credibility, regulatory acceptance, and innovation capacity of Ayush, positioning India as a global leader in traditional and integrative medicine

6.3 Global Recognition and WHO Integration

The World Health Organization's Traditional Medicine Strategy 2025–2034 marks a historic global recognition of traditional medicine as an integral component of future healthcare systems. India, as the world's largest practitioner and custodian of traditional medicine systems, is uniquely positioned to lead this global transformation through Ayush.

A defining milestone in this journey is the establishment of the WHO Global Traditional Medicine Centre (WHO-GTMC) in Jamnagar, Gujarat, established in 2022 through

collaboration between the Government of India and WHO. The centre is envisioned as the world's leading platform for traditional medicine research, evidence generation, policy development, innovation, and international standard-setting.

The WHO-GTMC significantly strengthens India's global leadership position in traditional medicine and creates a strategic pathway for enhancing the international scientific credibility, regulatory acceptance, and global integration of Ayush systems, products, and therapies.

6.4 International Ayurveda Centres of Excellence: A Strategic Catalyst for Globalising Ayush

One of the most transformative initiatives for expanding the global footprint of Ayush is the proposed establishment of International Ayurveda Centres of Excellence (IACoEs) across priority international markets. Envisioned by the Ministry of Ayush, these Centres of Excellence are proposed to serve as India's flagship institutions for promoting Ayush systems, strengthening scientific collaboration, building global awareness, and enhancing international acceptance of Ayush as a credible system for preventive, promotive, and integrative healthcare.

Modelled on the All-India Institute of Ayurveda (AIIA), these Centres of Excellence are designed to function as comprehensive institutions integrating clinical care, education, research, diagnostics, training, and evidence generation under a unified and internationally benchmarked framework. Beyond delivering healthcare services, the IACoEs will facilitate practitioner training, academic

exchange, clinical research, technology transfer, and regulatory engagement, creating long-term institutional partnerships with host countries.

The initiative forms a key recommendation of NITI Aayog's *Strategic Roadmap for Making Ayurveda Global* (July 2026) and represents a strategic shift from product exports to institutional and knowledge-led globalisation of Ayush. By creating trusted centres of excellence in major international markets, India can strengthen healthcare diplomacy, expand international Ayush services, improve regulatory acceptance, support market access for Ayush products, and establish a sustainable global ecosystem for traditional and integrative medicine. Collectively, these centres can become powerful catalysts for positioning India as the world's leading provider of Ayush knowledge, healthcare services, research, and innovation, while significantly contributing to the Vision 2030 goal of building a USD 213 billion Ayush economy.

Governance model of these IACOE's

Academic anchor

Each IACoE is built "on lines with" AIIA and will replicate India's premier Ayurveda institution's curriculum and clinical standards abroad.

International credibility layer

WHO Collaborating Centres are brought in as technical advisors which will give legitimacy to foreign regulators and insurers.

Domestic technical backbone

Partnerships with AIIA, ITRA (Institute of Teaching and Research in Ayurveda), and CCRAS (Central Council for Research in Ayurvedic Sciences) will supply the research and pedagogical content.

Six priority geographies have been identified for these IACOE's



UAE (Dubai/Abu Dhabi)

large NRI/diaspora base plus Gulf wellness-tourism demand



Mauritius / South Africa

likely leverages existing Indian-diaspora ties and prior Ayush information cells



Australia



Southeast Asia / Continental Europe



Germany/Switzerland

flagged specifically as "insurance-friendly," meaning these markets already have some pathway for complementary medicine reimbursement



United States (East & West coast academic centres)

targets research/academic legitimacy and the US wellness market simultaneously

6.5 Digital Platforms and the Tele-Ayush Ecosystem

Digital infrastructure will be the defining accelerators of Ayush mainstreaming and global scale-up. Beyond expanding access, digital platforms have the potential to create a unified ecosystem for healthcare delivery, research, education, evidence generation, telemedicine, and citizen engagement across all Ayush systems.

At the centre of this transformation is the proposed Ayush Grid, envisioned as the digital backbone of the entire Ayush ecosystem. Designed as an integrated national platform, the Ayush Grid aims to connect healthcare providers, educational institutions, researchers, pharmacies, wellness centres, and government programmes across Ayush systems.

India's expanding telemedicine ecosystem is already demonstrating the scalability potential of digital Ayush delivery. The integration of Ayush consultations within the eSanjeevani platform has enabled over 1.5 lakh teleconsultations, significantly improving healthcare access in rural and underserved regions. Simultaneously, the

integration of Ayush practitioners into the Ayushman Bharat Digital Mission (ABDM) and ABHA ecosystem is creating the foundation for interoperable, patient-centric digital health records across both Ayush and modern medicine systems.

1.5 Lakh+

Teleconsultations completed specifically through the integration of Ayush within the eSanjeevani platform.

The future of Ayush is both evidence-driven and digitally enabled. The Ayush Grid and digital health ecosystem can become the technological foundation that transforms India's traditional knowledge systems into scalable, data-enabled, globally connected healthcare platforms

At the centre of this transformation is the proposed Ayush Grid, envisioned as the digital backbone of the entire Ayush ecosystem.

Tele-Ayush & Digital Health Ecosystem – Key Metrics

PLATFORM / INITIATIVE	STATUS / SCALE
 eSanjeevani Ayush Teleconsultations	Operational nationwide Scaled beyond 1.5 lakh consultations; key Ayush vertical within eSanjeevani OPD.
 Ayush Grid (Omnibus IT Backbone)	Active & expanded Overarching IT backbone across Health Services, Education, Research, Drug Administration & Citizen-Centric Services.
 ABDM Integration	Deeply integrated Mapped with ABDM; Ayush records & practitioners linked to citizens' unique ABHA IDs.
 National Ayush Portal (ayush.gov.in)	Active Central public interface with NAMASTE portal, practitioner registries & health facility finders.
 HMIS Adoption in Ayush Institutions	Streamlined A-HMIS deployed across institutes, councils & wellness centers to track electronic health records (EHR).
 AI-enabled Diagnostic & Recommendation Apps	Scaled AI chatbots, Yoga Posture AI & data analytics modules deployed across research councils via PPPs.

6.6 Pathway to Becoming the Enabling Pillar

Research, evidence generation, and digital infrastructure will serve as the foundational enablers of the entire Ayush Vision 2030. Unlike the other pillars, which drive direct economic value, these pillars function as the strategic force multiplier that will determine the credibility, scalability, and long-term sustainability of the entire ecosystem.

A globally benchmarked and digitally integrated research ecosystem will directly accelerate insurance reimbursement and mainstream healthcare integration by generating outcome-based clinical evidence. It will strengthen export competitiveness by improving regulatory acceptance, scientific validation, and international trust in Ayush products and therapies. Simultaneously, it will support manufacturing growth through standardisation, quality assurance,

traceability, and pharmacovigilance systems, while also reinforcing wellness tourism through internationally credible certification and evidence-backed treatment protocols.

Digital platforms such as the Ayush Grid, ABDM integration, telemedicine ecosystems, AI-enabled diagnostics, and interoperable health records will further enable Ayush to scale efficiently across healthcare delivery, research, education, and citizen services.

In effect, research and digitalisation are not peripheral support systems but they are the institutional backbone that will transform Ayush from a traditionally trusted system into a globally recognised, evidence-driven, technology-enabled healthcare ecosystem^{39 40}.

6.7 Policy Enablers and Recommendations

The success of the research, evidence, and digitalisation of Ayush systems will depend on India's ability to build a globally credible, technology-enabled, and institutionally integrated Ayush innovation ecosystem. The following strategic interventions can accelerate this transformation:

Enabling Research | Powering Ayush | Leading Globally

Policy Enablers



EVIDENCE • INNOVATION • IMPACT

Recommendations



Chapter:7

Pillar 6: International Ayush Services and Global Knowledge Economy

Beyond products and wellness tourism, the next frontier of India's Ayush economy lies in the export of knowledge, healthcare services, professional expertise, digital health, education, and institutional partnerships. As countries increasingly integrate traditional, preventive, and complementary medicine into their health systems, demand is growing for qualified practitioners, digital consultations, clinical advisory services, institutional collaborations, academic programmes, and internationally accredited wellness providers. India's deep-rooted Ayurveda, Yoga, Siddha, Unani, Sowa-Rigpa, and Homoeopathy systems, is

uniquely positioned to become the world's leading exporter of Ayush knowledge and services.

By leveraging its large pool of qualified professionals, established education system, digital public infrastructure, and growing international recognition of traditional medicine, India has the opportunity to build a USD 40* billion International Ayush Services Economy by 2030, making it one of the key contributors to the overall USD 213 billion Ayush economy.

(* This is an illustrative figure with potential of realisation).

7.1 Current Landscape and Emerging Global Opportunity

Global demand for preventive healthcare, healthy ageing, chronic disease management, mental well-being, and holistic healthcare is expanding rapidly. More than 190 WHO Member States have reported the use of traditional, complementary, or integrative medicine within their healthcare systems, while increasing numbers of universities, hospitals, insurers, and governments are exploring evidence-based integration of traditional medicine into mainstream care.

India already possesses many of the essential building blocks for global leadership. The country has a large network of Ayush educational institutions, a skilled workforce of practitioners and therapists, internationally recognised Yoga expertise, expanding telemedicine infrastructure, the WHO Global Traditional Medicine Centre (GTMC), international

collaborations, partnerships and forums like BIMSTEC and BRICS and growing bilateral cooperation with countries across Asia, Africa, Europe, the Middle East, and Latin America. Government initiatives such as Heal in India, Heal by India, the Ayush Visa, and international cooperation programmes have further strengthened India's global engagement.

Despite these strengths, India's exports remain largely concentrated in products and wellness tourism, while high-value service exports including tele-consultations, overseas clinics, institutional partnerships, education, professional certification, and digital health remain significantly underdeveloped, presenting a major opportunity for growth.

7.2 Pathway to a USD 40 Billion International Ayush Services Economy

India can unlock a USD 40 billion global services market by positioning Ayush as an internationally accessible

healthcare and knowledge ecosystem rather than solely a domestic healthcare system.

India's Global Leadership in Ayush Services

Building a USD 40 Billion Opportunity by 2030

International Ayush Services Economy - Opportunity by 2030

SEGMENT	ESTIMATED OPPORTUNITY BY 2030
 International Ayush Clinics, Hospitals & Franchise Networks	USD 22 Billion
 Cross-border Tele-Ayush and Digital Health Services	USD 12 Billion
 Global Education, Training, Certification & Institutional Partnerships	USD 6 Billion
TOTAL INTERNATIONAL AYUSH SERVICES ECONOMY	~USD 40 BILLION

DELIVERING GLOBAL IMPACT

			
Expanding Access to Holistic Healthcare	Creating Quality Jobs & Skilled Opportunities	Strengthening India's Soft Power Globally	Earning Valuable Foreign Exchange for India

India's Competitive Advantage



Growth will be driven by increasing international demand for evidence-based traditional medicine, digital healthcare delivery, workforce shortages in many developed countries, expanding wellness markets, and India's comparative advantage in affordable, high-quality healthcare and professional education.

7.3 Strategic Policy Enablers and Recommendations

Achieving a USD 40 billion international services economy will require a coordinated national strategy that positions Ayush as a globally exportable service sector.

7.3.1 Launch a National "Global Ayush Services Mission"

Develop a whole-of-government mission led by the Ministries of Ayush, Commerce, External Affairs, Education, Tourism, and Skill Development to promote Ayush services as a strategic healthcare export.

7.3.2 Create an International Ayush Provider Network

Support the establishment of accredited Ayush clinics, wellness centres, hospitals, and franchise networks in priority international markets through PPPs, diplomatic partnerships, and investment facilitation.

7.3.3 Develop a Global Tele-Ayush Platform

Establish a secure digital platform for international consultations, follow-up care, second opinions, e-prescriptions (where permitted), multilingual support, digital payments, and continuity of care.

7.3.4 Position India as the Global Ayush Education Hub

Expand international student enrolment through dedicated scholarships, dual-degree programmes, online learning, continuing professional development, international certification, and partnerships with overseas universities.

7.3.5 Enable International Regulatory Recognition

Accelerate bilateral agreements for professional recognition, harmonised standards, curriculum alignment, practitioner mobility, and acceptance of Ayush qualifications in priority markets.

7.3.6 Strengthen Global Evidence and Accreditation

Develop internationally benchmarked accreditation systems, competency standards, digital credentials, and quality assurance mechanisms aligned with WHO guidance and global best practices.

7.3.7 Promote Ayush as a Strategic Healthcare Export

Recognise Ayush services as a priority healthcare export sector under India's trade and export promotion strategy, supported by export incentives, investment promotion, and dedicated market access programmes.

The future of Ayush extends far beyond domestic healthcare delivery. By exporting healthcare services, digital consultations, professional expertise, education, research collaborations, and institutional partnerships, India can create an entirely new global services economy anchored in its traditional knowledge systems. A coordinated national strategy that combines digital innovation, international

partnerships, regulatory harmonisation, quality assurance, and global branding can position India as the world's leading provider of traditional and integrative healthcare services. Realising this opportunity has the potential to generate USD 40 billion in annual exports by 2030, making International Ayush Services one of the largest growth engines of India's USD 213 billion Ayush economy.

Chapter:8

Pillar 7: Yoga Economy: Positioning India as the Global Hub for Yoga, Wellness and Preventive Health

Yoga is one of India's most globally recognised soft-power assets and represents a rapidly expanding economic opportunity spanning healthcare, wellness, education, tourism, digital services, corporate wellness, fitness, and professional training. Supported by growing international awareness of preventive healthcare, mental well-being, and healthy ageing, the global yoga market is witnessing sustained double-digit growth. India, as the birthplace of Yoga and the custodian of its authentic traditions, is uniquely positioned to transform this cultural heritage into a globally competitive economic sector.

Currently estimated at approximately USD 7 billion, India's Yoga Economy has the potential to expand to USD 15 billion by 2030, driven by an annual growth rate of 14–15%. This growth will be fuelled by expanding domestic participation, increasing international demand, digital delivery models, wellness tourism, and the globalisation of Indian Yoga education and certification. As a result, the Yoga Economy will emerge as a significant contributor to India's USD 213 billion Ayush economy by 2030.

8.1 Current Landscape and Government Initiatives

Over the past decade, Yoga has evolved from a traditional practice into a global wellness movement. The declaration of the International Day of Yoga (IDY) by the United Nations, celebrated annually in more than 190 countries, has significantly enhanced global awareness and acceptance of Yoga. India has further strengthened its leadership through initiatives led by the Ministry of Ayush, including the Yoga Certification Board (YCB), Common Yoga Protocol, National Ayush Mission, evidence-based Yoga research, Yoga 360 and integration of Yoga into public health and wellness programmes.

The rapid expansion of digital health platforms, corporate wellness initiatives, schools, universities, hospitals, and wellness centres has further increased the accessibility and adoption of Yoga. Simultaneously, the growing popularity of Yoga tourism in destinations such as Rishikesh, Varanasi, Bodh Gaya, Kerala, Mysuru, and Puducherry has positioned Yoga as an important driver of India's wellness tourism ecosystem.

8.2 Pathway to a USD 15 Billion Yoga Economy by 2030

India's Yoga Economy is projected to grow from approximately USD 7 billion to USD 15 billion by 2030, representing a sustained annual growth of 14–15%. This

trajectory aligns with the continued expansion of the global Yoga and wellness market and India's increasing leadership in preventive healthcare.

Yoga Economy 2030

From Heritage to Global Leadership

Building a USD 15 Billion Yoga Economy by 2030

SEGMENT	ESTIMATED
Yoga Studios, Wellness Centres & Retreats	USD 5.0 Billion
Digital Yoga Platforms & Online Services	USD 3.0 Billion
Yoga Tourism & Retreat Experiences	USD 2.5 Billion
Teacher Training, Certification & Education	USD 2.0 Billion
Corporate Wellness & Institutional Programmes	USD 1.5 Billion
Yoga Products, Events & Allied Services	USD 1.0 Billion
TOTAL YOGA ECONOMY	USD 15 BILLION

Yoga Economy



USD
7 Bn

USD
15 Bn

Growth of 14–15% Annually to 2030

- International Day of Yoga celebrated annually in 190+ countries following UN declaration
- Anchored by the Yoga Certification Board, Common Yoga Protocol and destination circuits including Rishikesh, Varanasi, Bodh Gaya, Kerala, Mysuru and Puducherry.

INDIA'S COMPETITIVE ADVANTAGE



Birthplace and Authentic Source of Yoga



International Recognition through UN International Day of Yoga



Globally Accepted Common Yoga Protocol & Yoga Certification Board



Large Pool of Certified Yoga Professionals and Training Institutions



Integration with Ayush, Healthcare, Education and Wellness Tourism



Expanding Digital Health Ecosystem Supporting Online Yoga Delivery



Globally Recognised Destinations (Rishikesh, Kerala, Mysuru, Varanasi and Bodh Gaya)



Strong International Demand Supported by Indian Diaspora and Cultural Diplomacy



8.3 Strategic Policy Enablers and Recommendations

Achieving a USD 15 billion Yoga Economy by 2030 will require a coordinated national strategy that positions

Yoga as a globally competitive wellness, education, and healthcare sector.

Develop Global Yoga Destination Circuits

Establish internationally Yoga circuits linking Rishikesh, Mysuru, Kerala, Varanasi, Bodh Gaya, Puducherry, and Dharamshala, integrating Yoga with wellness tourism, spirituality, nature, and cultural experiences.

Expand India's Digital Yoga Leadership

Create a global Digital Yoga Platform offering multilingual classes, AI-enabled personalised wellness programmes, teacher certification, tele-yoga consultations, and international subscription-based services.

Position India as the Global Centre for Yoga Education

Strengthen international student enrolment through globally recognised certification, academic partnerships, online learning, faculty exchange programmes, and specialised centres for Yoga research and teacher training.

Promote Global Standards and Evidence-Based Yoga

Expand clinical research, outcome evaluation, and international collaborations to strengthen scientific evidence and support the integration of Yoga into healthcare systems, insurance, and workplace wellness programmes.

Encourage Private Investment and Innovation

Facilitate investment in Yoga startups, wellness resorts, digital platforms, research, certification technologies, and global franchise networks through PPPs, innovation grants, and startup support.

Strengthen International Partnerships

Leverage India's diplomatic network to expand Yoga centres abroad, institutional partnerships, teacher exchange programmes, and recognition of Indian Yoga qualifications in priority international markets.

Yoga represents far more than a traditional practice, it is a strategic economic sector with the potential to generate employment, promote preventive healthcare, strengthen India's global soft power, and expand service exports. By integrating Yoga with digital health, education, tourism, research, and corporate wellness, India can establish itself

as the undisputed global hub for Yoga. A coordinated national strategy built on quality, innovation, international partnerships, and evidence-based practice will enable the Yoga Economy to reach USD 15 billion by 2030, making it a key pillar of India's USD 213 billion Ayush economy.

Chapter:9

Whole-of-Government Convergence for a USD 213 Billion Ayush Economy

9.1 Why Convergence Matters

Achieving the vision of a USD 213 billion Ayush economy by 2030 requires a coordinated national effort extending beyond the Ministry of Ayush. The future growth of Ayush will be driven through manufacturing, exports, healthcare integration, wellness tourism, education, research, digital

health, agriculture, innovation, skill development, and international partnerships. A Whole-of-Government approach will be critical to align policies, investments, regulations, and implementation across ministries and states to create an integrated Ayush ecosystem.

Learning from China's Traditional Chinese Medicine (TCM) Model: A Roadmap for Strengthening India's Ayush Ecosystem

China's experience in mainstreaming Traditional Chinese Medicine (TCM) offers valuable lessons for countries seeking to integrate traditional systems of medicine into modern healthcare while building globally competitive industries. China has adopted a coordinated policy approach that treats TCM not merely as an alternative therapy but as a strategic pillar of its healthcare system, pharmaceutical industry, research ecosystem, and export economy.

TCM is deeply embedded within China's public health architecture. It is covered under the national health insurance system, included in the National Essential Medicines List, and routinely delivered alongside modern medicine through integrated hospitals and healthcare facilities. This institutional integration has enhanced patient access, increased public confidence, and ensured that traditional medicine forms an integral part of preventive, promotive, and curative healthcare services.

China's success, however, extends far beyond healthcare delivery. The country has systematically built a complete TCM value chain through coordinated policy interventions across multiple pillars like Healthcare service delivery by integrating

TCM into primary, secondary, and tertiary healthcare institutions, supported by insurance reimbursement and national treatment guidelines, Research and Innovation through public investment in clinical research, evidence generation, pharmacological studies, and product innovation to validate efficacy and improve quality., Quality Assurance and Regulation, Medicinal Plant Cultivation through promotion of Good Agricultural Practices (GAP), conservation of medicinal plant resources, contract farming, and dedicated cultivation zones to ensure sustainable and traceable raw material supply, Manufacturing and Modernisation of TCM manufacturing through Good Manufacturing Practices (GMP), Establishment of specialised universities, research institutes, clinical training programmes, and continuous professional education to create a skilled workforce across healthcare, research, and industry and strategic promotion of TCM through international cooperation, overseas treatment centres, product registrations, standards harmonisation, and inclusion in global health dialogues.

These coordinated interventions have enabled TCM products to occupy a significant share of China's pharmaceutical market while simultaneously expanding their global footprint. The sector today represents not only a healthcare intervention but also an important contributor to economic growth, innovation, employment, and exports.

9.2 National Convergence Framework

Ministry	Strategic Role	Contribution to USD 213 Billion Economy
Ministry of Ayush	Sector leadership, policy, regulation, quality standards, research, capacity building	Overall ecosystem development and coordination
Ministry of Ayush's National Medicinal Plants Board (NMPB)	Conservation, supply chain	Sustainable medicinal plant ecosystem
Ministry of Health & Family Welfare	Integrative healthcare, public health programmes, insurance, hospitals, AB-PMJAY	Increase Ayush service utilisation and healthcare integration
Ministry of Commerce & Industry	Export promotion, trade facilitation, investment, FTAs, market access	Manufacturing exports, international services, global market expansion
Ministry of Tourism	Wellness tourism, Medical Value Travel, destination branding	Expand wellness tourism and international visitor spending
Ministry of External Affairs	Bilateral cooperation, Ayush diplomacy, international recognition	Global partnerships, overseas Ayush centres, regulatory cooperation
Ministry of Education	Higher education, curriculum, international students, research	Human capital, global education exports, skilled workforce
Ministry of Skill Development & Entrepreneurship	Workforce certification, therapists, wellness professionals	Employment generation and international workforce mobility
Ministry of MSME	Cluster development, startups, entrepreneurship	Manufacturing, innovation, exports and rural enterprises
Ministry of Food Processing Industries	Nutraceuticals, herbal foods, value addition	Ayush nutrition and functional food industry
Ministry of Agriculture & Farmers Welfare	Medicinal plants, FPOs, cultivation, value chains	Raw material security and farmer income
Department of Pharmaceuticals	Standardisation, APIs, herbal medicines	Global competitiveness of Ayush products
Department for Promotion of Industry and Internal Trade (DPIIT)	Investment facilitation, startups, innovation	Attract domestic and foreign investment
Ministry of Electronics & IT (MeitY)	AI, ABDM, telemedicine, digital platforms	Digital Ayush ecosystem and global digital services
NITI Aayog	Cross-sector policy coordination and monitoring	Strategic governance and implementation oversight
State Governments	Infrastructure, implementation, investment, destination development	Local ecosystem development and service delivery

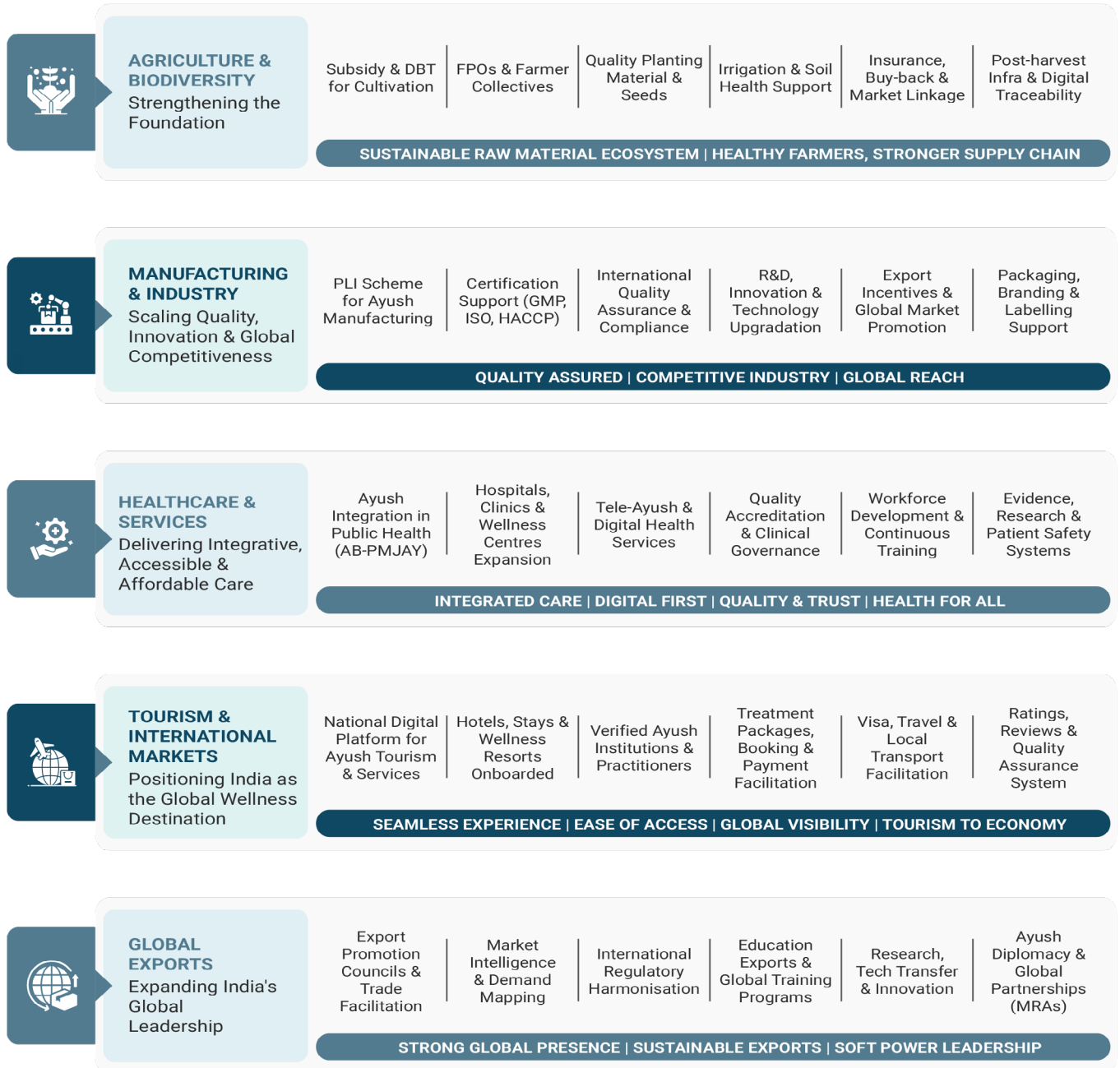
9.3 Cross-Sectoral Growth Model

The USD 213 billion Ayush economy should be viewed as an integrated value chain rather than a collection of independent sectors.

Ayush Economy: An Integrated Value Chain

Building A Usd 213 Billion Ecosystem By 2030

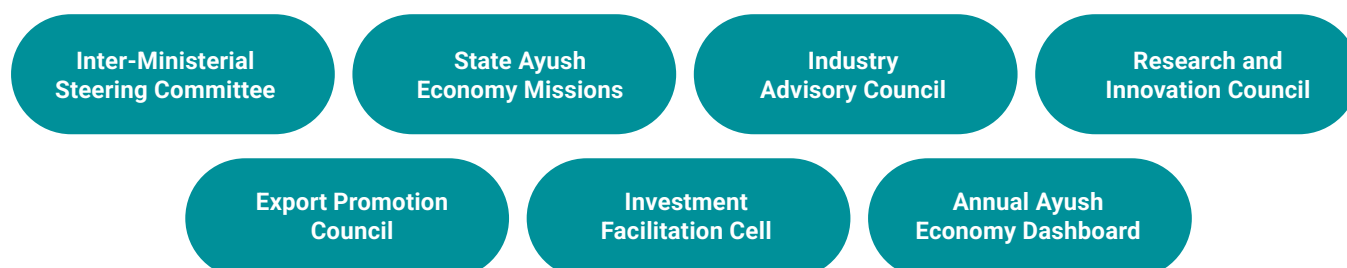
From Roots To Global Impact – One Ecosystem, Endless Opportunities



9.4 National Mission Approach

A National Economy Ayush Mission (NEAM) may be established under the chairpersonship of the Prime Minister or Cabinet Committee on Economic Affairs, with the Ministry of Ayush serving as the nodal ministry.

The Mission should comprise:



The main objective of this National Economy Ayush Mission will be to strengthen multi-sectoral governance through performance-linked financing and transparent progress monitoring to ensure accountability and sustained momentum toward achieving Ayush's recognition as a globally respected healthcare and well-being system contributing to universal health coverage and sustainable wellness worldwide. This approach will ensure that research, regulation, diplomacy, trade, education, and service delivery move in synchrony towards the shared vision of making Ayush a USD213 Bn economy.

9.5 Strategic Enablers

The convergence agenda should focus on eight national priorities:

9.5.1 Policy Integration as the Foundation for an Integrated Ayush Economy

Achieving the vision of a USD 213 billion Ayush economy will require Ayush to be positioned not as a standalone health sector, but as a cross-cutting national economic priority integrated across healthcare, agriculture, manufacturing, tourism, education, exports, digital economy, MSMEs, research, and innovation. A coordinated policy architecture that aligns sectoral strategies, investments, regulatory frameworks, and institutional mechanisms across ministries will be essential to unlocking the full economic potential of Ayush.

Strategic convergence with flagship national programmes can create powerful growth multipliers across the ecosystem. Integration with the Ayushman Bharat Digital Mission (ABDM) can enable nationwide digital connectivity, electronic health records, tele-Ayush services, and data-driven healthcare delivery. Alignment with the Ministry of MSME and Make in India initiatives can strengthen manufacturing competitiveness, technology adoption, cluster development, and global quality standards for Ayush enterprises. Collaboration with the Ministry of Tourism can

position Ayurveda, Yoga, and holistic wellness at the centre of India's wellness tourism and Medical Value Travel strategy, while convergence with the National Medicinal Plants Board (NMPB) and agricultural programmes can strengthen medicinal plant cultivation, farmer incomes, and raw material security. Similarly, integrating Ayush within the National Education Policy (NEP 2020) can foster interdisciplinary education, translational research, innovation, and the development of a globally competitive workforce.

A Whole-of-Government approach will ensure policy coherence, optimise public investments, reduce institutional fragmentation, accelerate private sector participation, and create a seamless ecosystem that enables Ayush to emerge as a major driver of healthcare transformation, exports, employment generation, rural prosperity, and sustainable economic growth.



Investment Mobilisation

Ayush sector manufacturing has surpassed the output growth rate of major industries in India. Since 2014, the sector has picked up a robust pace of growth, with output growing from Rs. 11,540 crores during 2014-15 to 19,557.5 crores in 2017-18. Between 2012-13 to 2017-18, the output produced by organized segment of Ayush drug manufacturing units increased at approximately 12.7 per cent per annum.

Investment is the key driver that propels quantum leap. Achieving the next phase of growth will require significantly higher public and private investment across the Ayush value chain. While government schemes have supported infrastructure development, greater participation from private investors, venture capital funds, financial institutions, and industry will be essential.

Future investments should focus on:

1. Modernising of manufacturing facilities
2. Investment across clinical research and product innovation
3. Developing and strengthening the Wellness infrastructure to cater to larger number of domestic and international persons
4. Medicinal plant cultivation: The mainstay of the Ayush sector lies not in factories, but in farms. Production of medicinal plants forms the backbone of the Ayush sector, and PLI schemes will further strengthen and boost medicinal plants farming.
5. Digital health platforms: Integration of Ayush with ABDM and expanding Ayush telemedicine will be very important as a strategic enabler for growth
6. Ayush startups and technology companies: Dedicated venture funds, blended finance mechanisms, viability gap funding, and Public-Private Partnerships (PPPs) can accelerate investments across these areas.



Regulatory Harmonisation

A strong regulatory framework is essential for improving quality, building confidence, and expanding the exports market. Although India has established Good Manufacturing Practices (GMP) guidelines for Ayush drugs, greater harmonisation with international standards is required. The main priority areas for this would include:

1. Upgrading to WHO-GMP compliance across manufacturing units
2. Expanding accreditation of laboratories
3. Improving pharmacovigilance systems
4. Digitalising product registration and licensing
5. Enhancing traceability across the supply chain
6. Aligning quality standards with WHO guidelines and key export markets

Simplified and transparent regulatory systems will reduce compliance costs while improving India's credibility in global



Innovation & Research

Scientific evidence will play a critical role in expanding acceptance of Ayush both within India and internationally. While significant progress has been made through institutions such as CCRAS, CCRYN, CCRUM and the All-India Institute of Ayurveda, greater investment in research is needed. Priority areas include:

- | | |
|--|---|
| 1. Multi-centre clinical trials | 5. Digital therapeutics |
| 2. Translational research | 6. Genomics and personalised healthcare |
| 3. AI-enabled drug discovery | 7. International collaborative research programmes |
| 4. Precision medicine | |

Centres of Excellence should be expanded to encourage collaboration between Ayush institutions, IITs, AIIMS, ICMR, CSIR, biotechnology companies and international universities.



Human Capital

India already has one of the world's largest traditional medicine workforces. However, future growth will depend on improving quality, specialisation, and global employability.

India already has one of the world's largest traditional medicine workforces. However, future growth will depend on improving quality, specialisation, and global employability.

The focus should shift towards:

1. Curriculum modernisation
2. Digital health competencies
3. International certification programmes
4. Clinical specialisation
5. Continuous professional development
6. Entrepreneurship and innovation training

Industry-oriented skill development programmes should also be introduced for manufacturing, quality assurance, medicinal plant cultivation, wellness services, exports, and digital health.

Building a globally recognised Ayush workforce will strengthen India's position as an international knowledge hub



Global Market Expansion

India has an opportunity to position Ayush as a global wellness and healthcare brand. While exports of Ayush products continue to grow, significant untapped potential remains in pharmaceuticals, nutraceuticals, wellness services, medical tourism, and digital health.

Future efforts should focus on:

1. Regulatory approvals in major International markets
2. Bilateral recognition agreements
3. International standardisation
4. Global branding campaigns
5. Expansion of Ayush Information Cells

6. Overseas wellness centres
7. Integration with India's diplomatic initiatives

India's leadership during the establishment of the WHO Global Traditional Medicine Centre in Jamnagar provides a strong platform for enhancing international collaboration.



Digital Transformation

Integration of Digital technologies can significantly improve accessibility, efficiency, transparency, and research across the Ayush ecosystem. Integration of Digital technologies can significantly improve accessibility, efficiency, transparency, and research across the Ayush ecosystem.

Priority interventions include:

1. Integration with the Ayushman Bharat Digital Mission
2. Tele-Ayush consultations
3. Electronic Health Records
4. AI-based clinical decision support
5. Digital prescriptions
6. E-commerce platforms

7. National Ayush data repositories
8. Digital traceability systems

Digital platforms can also support research, pharmacovigilance, patient engagement, and evidence generation while expanding access to services in rural and remote areas



State-led Ecosystem Development

India's diverse agro-climatic conditions and traditional knowledge systems provide unique opportunities for state-specific Ayush specialisation. Rather than adopting a uniform national model, each state should develop comparative advantages based on its natural resources, institutional strengths, and industrial ecosystem.

Illustrative examples include:

Kerala – Ayurveda healthcare, wellness tourism, Panchakarma
Uttarakhand – Yoga, naturopathy and spiritual wellness
Gujarat – Ayush pharmaceuticals and manufacturing
North-Eastern States – Medicinal plant cultivation & biodiversity
Karnataka – Digital health, research and innovation
Jammu & Kashmir and Himachal Pradesh – High-altitude medicinal plants

Tamil Nadu – Siddha medicine

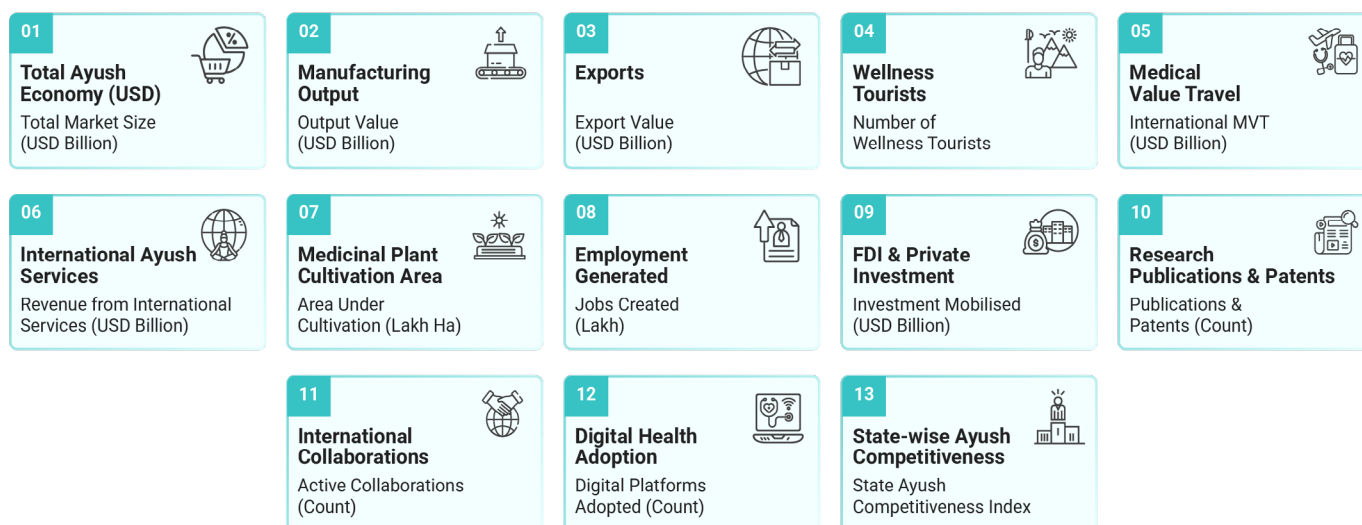
Uttar Pradesh – Unani and Ayurveda education
 State-level Ayush missions, investment promotion policies, and dedicated industrial clusters can accelerate regional development while contributing to national growth.

9.5.9 Governance and Monitoring Framework

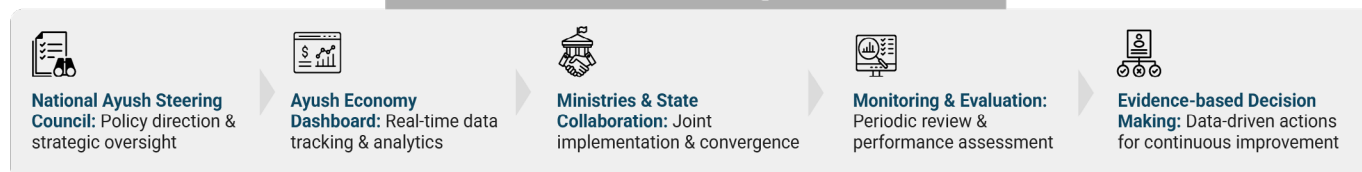
A dedicated Ayush Economy Dashboard should monitor progress against key indicators, including:

Ayush Economy Dashboard Governance & Monitoring Framework

Tracking Progress Towards a USD 213 Billion AYUSH Economy by 2030



Governance & Monitoring Architecture



The USD 213 billion Ayush economy is not solely a health sector ambition. It is a national economic transformation agenda. Its success will depend on coordinated action across healthcare, agriculture, manufacturing, tourism, education, trade, research, digital innovation, and international cooperation. A Whole-of-Government approach, supported by active participation from states, academia, industry, and development partners, will be essential to position India as the global leader in traditional and integrative medicine by 2030.

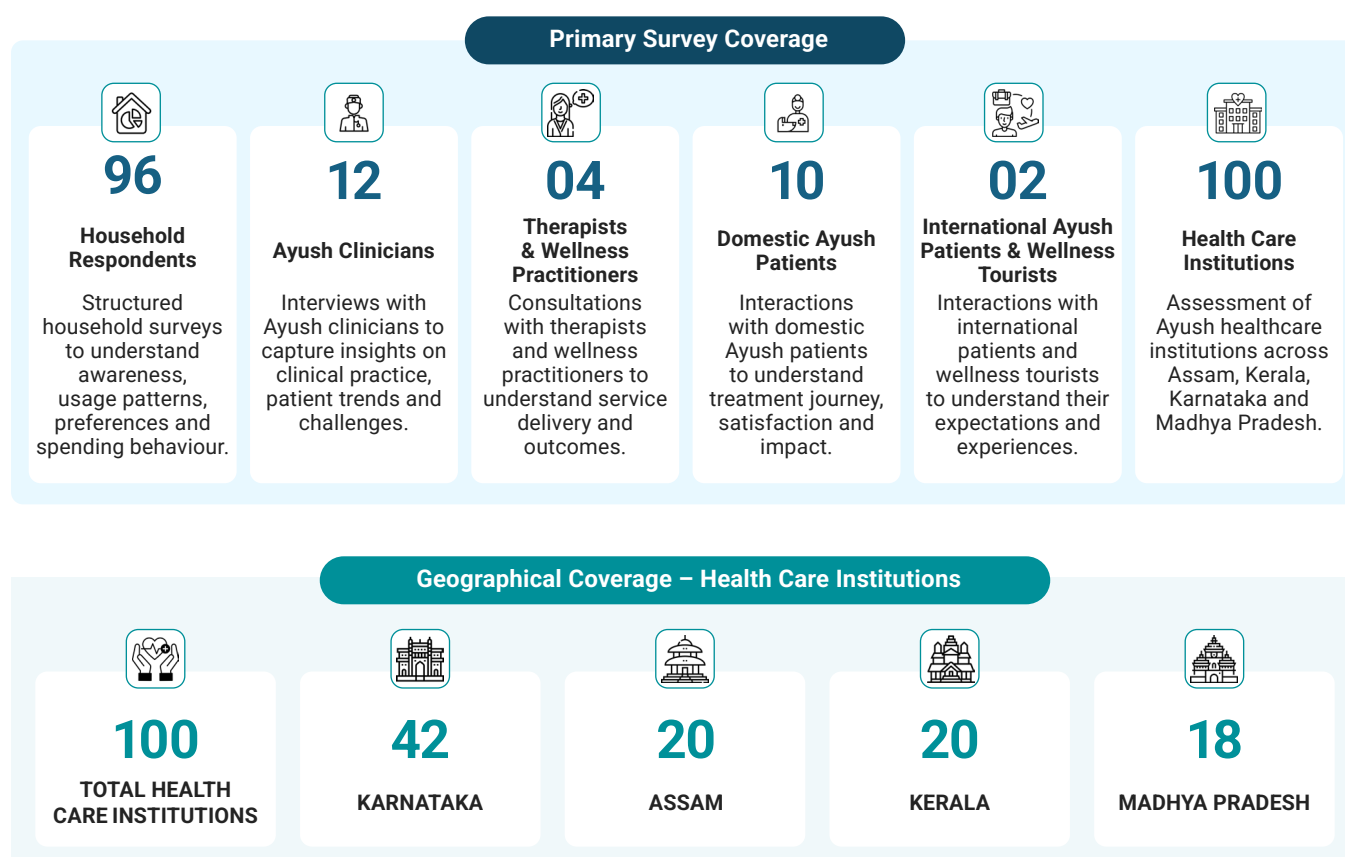
Chapter:10

Primary Research – Voices from the Field

This report adopts a multi-layered, evidence-driven research framework combining secondary analysis, market assessment, policy review, stakeholder consultations, and primary field research to evaluate the growth potential of the Ayush sector and develop a strategic roadmap towards a \$213 billion Ayush economy by 2030.

The methodology integrates both quantitative and qualitative approaches to assess sectoral opportunities, institutional

readiness, healthcare integration, export competitiveness, manufacturing capacity, wellness tourism potential, digitalisation, and consumer behaviour across the Seven strategic pillars of the report. Primary research formed an important component of the study and included structured household surveys, Key Informant Interviews (KIIs), clinician consultations, and interactions with domestic and international Ayush patients and wellness seekers. The study covered:



The primary research was designed to understand perceptions, awareness, accessibility, affordability, utilisation patterns, trust levels, healthcare-seeking behaviour, quality concerns, insurance acceptance, infrastructure gaps, integration challenges, and future expectations related to Ayush systems among different stakeholder groups.

The analysis was further strengthened through consultations with healthcare institutions, wellness centres,

manufacturers, researchers, practitioners, policymakers, and ecosystem stakeholders to triangulate findings and validate strategic insights and build personas. While certain components of the primary research are indicative in nature due to sample size limitations, the consistency of findings across stakeholder categories provides strong directional validation for the growth projections, policy priorities, and strategic recommendations presented in this report. Findings from the surveys are as follows:

The analysis was further strengthened through consultations with healthcare institutions, wellness centres, manufacturers, researchers, practitioners, policymakers, and ecosystem stakeholders to triangulate findings and validate strategic insights and build personas. While certain

components of the primary research are indicative in nature due to sample size limitations, the consistency of findings across stakeholder categories provides strong directional validation for the growth projections, policy priorities, and strategic recommendations presented in this report.

Our findings corroborate with the first exclusive all-India survey on 'Ayush', conducted by the National Sample Survey Office (NSSO) from July 2022 to June 2023. The NSSO findings also suggested that

Approximately 95% of rural and 96% of urban respondents are aware of Ayush.

At least one member is aware of Medicinal Plants/Home remedies/Local Health Tradition/Folk medicine in about 85% of rural and 86% of urban households.

Around 46% of rural and 53% of urban individuals used Ayush for prevention or treatment of ailments in the past 365 days.

Ayurveda is the most commonly used system across both rural and urban areas for treatment.

Ayush is predominantly used for rejuvenation and preventive measures.

10.1 Therapist Survey

What Therapists Reveal About the Evolving Role of Ayush

Insights from frontline service providers

1

GROWING DEMAND FOR AYUSH THERAPIES

Therapists report:

- ‡Higher patient workload
- ‡Growing utilization over the last 3 years
- ‡Increasing demand for chronic and recurring health conditions

Common reasons patients seek Ayush:

-  Pain & Musculoskeletal Disorders
-  Respiratory Conditions
-  Stress, Anxiety & Sleep Disorders
-  Lifestyle & Metabolic Diseases
-  Women's Health Concerns

KEY MESSAGE

Ayush is no longer confined to preventive wellness. Patients are increasingly seeking it for ongoing therapeutic care.

2

WHY PATIENTS KEEP COMING BACK

Patient Satisfaction Drivers

-  Relief from chronic conditions
-  Fewer perceived side effects
-  Personalized and holistic care
-  Supportive therapist interaction
-  Continuity of care

Ayush care is relationship-driven

Unlike episodic treatment models, patients often engage in repeated sessions and longer-term care journeys.

KEY MESSAGE

Ayush is no longer confined to preventive wellness. Patients are increasingly seeking it for ongoing therapeutic care.

WHAT'S HOLDING GROWTH BACK?

INFRASTRUCTURE GAPS

-  Lack of modern diagnostic equipment
-  Limited specialized infrastructure
-  Inconsistent digital systems
-  Dependence on external referrals for diagnostic support

INTEGRATION GAPS

-  Limited formal integration with allopathic care
-  Lack of clear referral pathways
-  Limited shared patient records
-  Need for stronger institutional collaboration

KEY MESSAGE

Therapists are open to integrative healthcare. The challenge is systems, not workforce resistance.

THE THERAPIST PERSPECTIVE

AYUSH therapies are increasingly functioning within:


Chronic disease management


Rehabilitation


Pain management


Lifestyle care


Geriatric care


Mental wellness

TO SCALE FURTHER, AYUSH NEEDS:

- ‡Stronger infrastructure
- ‡Better digital systems
- ‡Formal healthcare integration
- ‡Insurance-backed treatment continuity

10.2 Patient Survey

What Patients Reveal About the Future of Ayush

Insights on Utilization, Accessibility & Integrated Care

1

AYUSH IS PART OF DAILY LIFE

Patients integrate AYUSH practices into their everyday routines.



Yoga & Breathing Exercises



Preventive Health



Stress Management



Mobility & Flexibility



Chronic Condition Support

KEY INSIGHT

Patients view Ayush as a continuous health management system—not a one-time treatment intervention.

Ayush is increasingly embedded within everyday wellness and self-care behaviour.

2

WHY PATIENTS TRUST AYUSH

Top Reasons Patients Choose AYUSH



Natural & Holistic Approach



Positive Personal Experiences



Fewer Perceived Side Effects



Long-Term Wellness Benefits



Cultural Familiarity & Trust

EMERGING TREND

Patients increasingly want stronger scientific evidence alongside traditional trust.

Trust today is built on experience. Future growth will depend on evidence-backed trust.

3

WHAT'S HOLDING GROWTH BACK?

ACCESS GAPS



Limited nearby facilities



Shortage of AYUSH providers



Uneven service availability

INTEGRATION GAPS



Limited presence in hospitals



Weak referral pathways



Lack of shared patient records



Limited recommendations from allopathic providers

Patients do not reject Ayush. They struggle to access it within mainstream healthcare systems.

4

WHAT WOULD INCREASE ADOPTION?

Patients say adoption would increase with:

ACCESS GAPS



Better awareness



More AYUSH doctors



Stronger research evidence

INTEGRATION GAPS



Hospital integration



Better digital access



Improved availability

Patients are open to deeper Ayush engagement if systemic barriers are addressed.

The Patient Perspective

Patients already associate AYUSH with:



Wellness & Prevention



Chronic Care Support



Symptom Management



Rehabilitation



Long-Term Health Management



Institutional Integration



Evidence Generation



Better Accessibility



Stronger Public Confidence



Digital Enablement

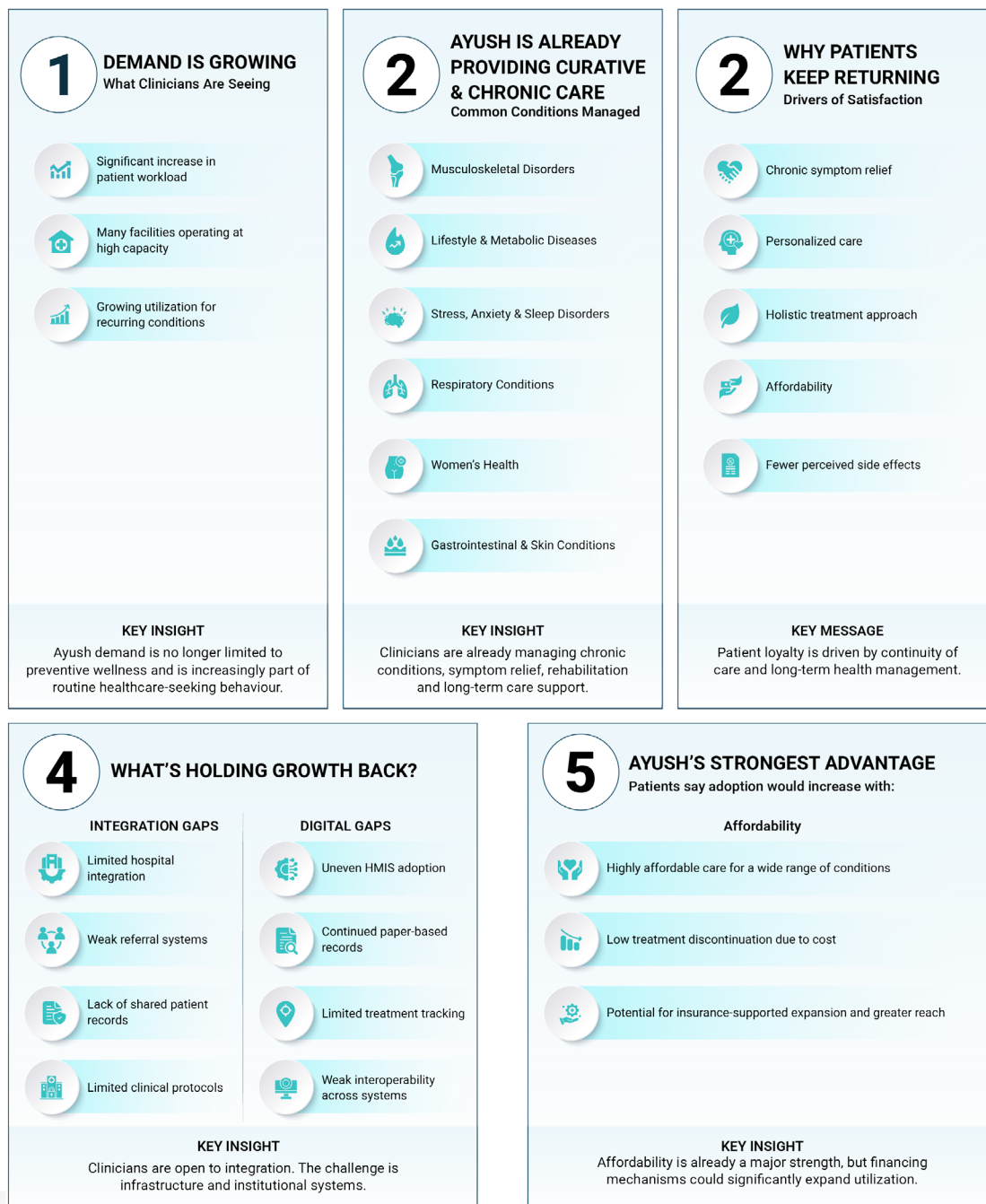
To accelerate growth, AYUSH needs:

10.3 Clinicians Survey

What Clinicians Reveal About the Evolution of Ayush

Insights on Practice, Integration & Service Delivery

Clinicians report rising patient demand, expanding curative use, and strong patient satisfaction—but institutional systems are lagging behind.



THE CLINICIAN PERSPECTIVE

AYUSH IS ALREADY FUNCTIONING AS:

- Chronic Care Support
- Curative Care for Non-Emergency Conditions
- Rehabilitation Support
- Pain Management
- Lifestyle Disease Management

TO SCALE FURTHER, AYUSH NEEDS:

- Institutional Integration
- Digital Strengthening
- Clinical Standardization
- Evidence Generation
- Insurance Inclusion
- Formal Recognition within Healthcare Systems

10.4 International Medical Tourists Survey

What International Medical Tourists Reveal About Ayush and India

Insights on Global Wellness Positioning

International visitors travel to India for AYUSH to manage chronic conditions, recover holistically, and optimize long-term wellness—driven by authenticity, affordability, and trust in India's heritage.



THE INTERNATIONAL CLINICIAN PERSPECTIVE

INTERNATIONAL VISITORS VALUE AYUSH FOR:

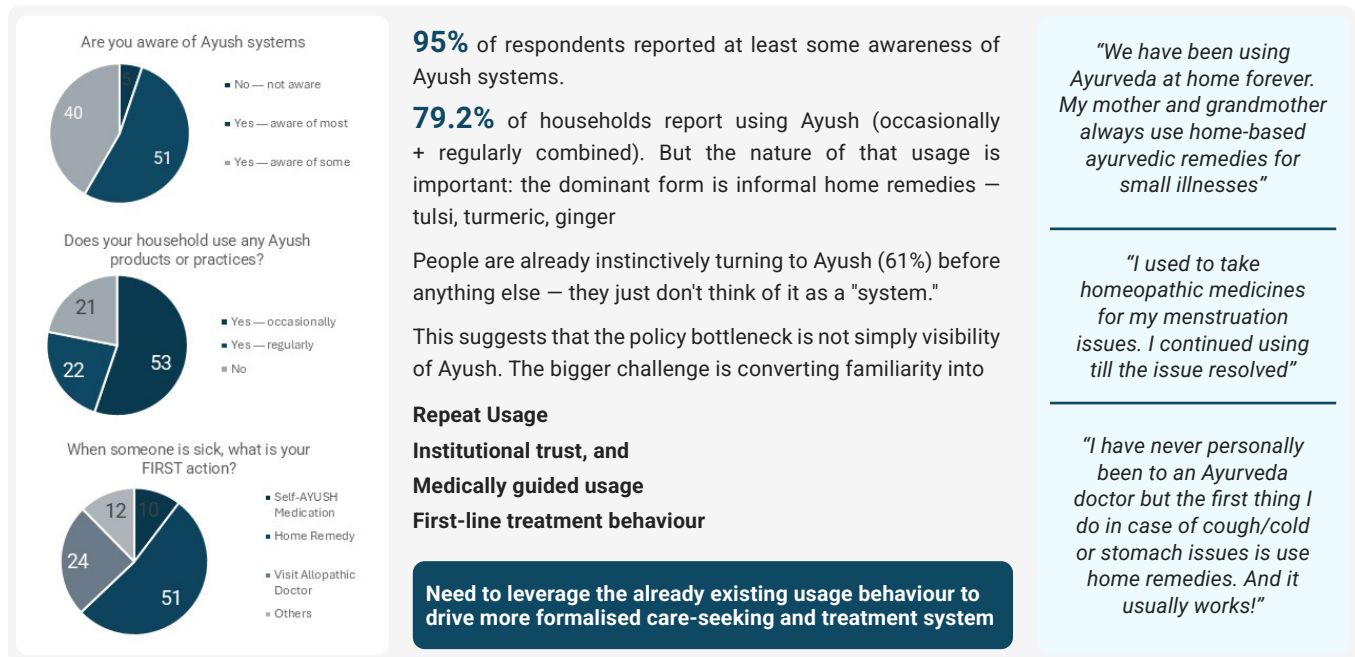


TO POSITION INDIA AS THE GLOBAL LEADER, AYUSH NEEDS:

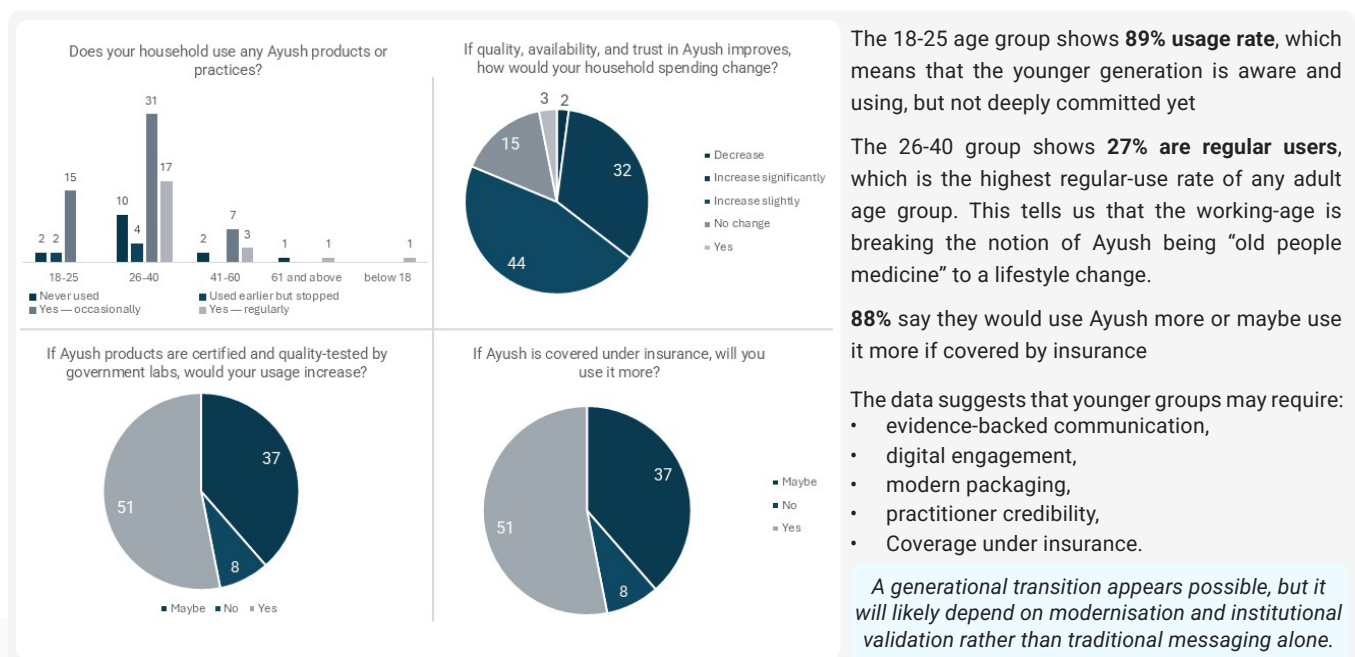


10.5 Household Survey

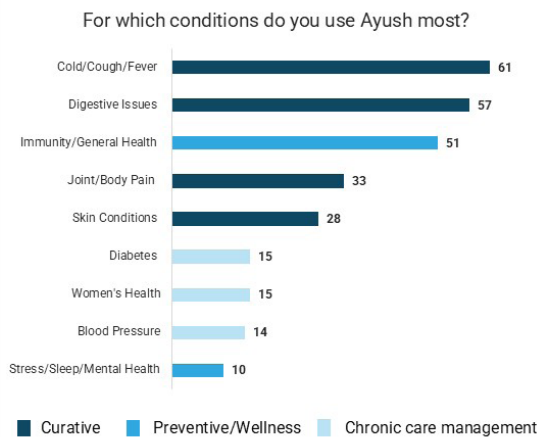
The cultural infrastructure for Ayush is already there, the clinical scaffolding needs to be strengthened



The 26-40 cohort is the engine – and they're moving towards Ayush



Ayush is already being utilised as a therapeutic response to symptoms and disease episodes rather than only as a preventive intervention



1. Define and institutionalize "Ayush-first conditions"
2. Strengthen Ayush presence at the primary care level
3. Create referral and escalation protocols - Ayush first where appropriate, with clear escalation pathways.

Ayush is already being utilized as a therapeutic response to symptoms and disease episodes rather than only as a preventive intervention.

Ayush is being used for the treatment of common acute and recurrent ailments such as **respiratory infections, digestive disorders, musculoskeletal pain, and dermatological conditions.**

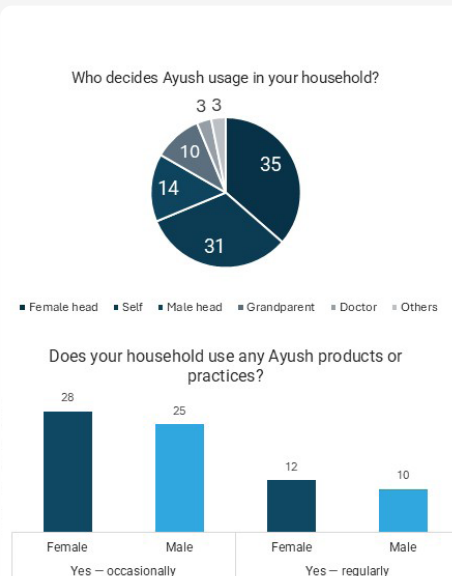
While preventive and wellness applications remain important, public utilization patterns suggest that Ayush is increasingly functioning as a therapeutic and first-response healthcare option rather than being confined solely to preventive care

"I have had gastric issues all my life and I have been to several allopathic doctors. But continuous use of an ayurvedic medicine has helped the condition stabilise"

"I used to get really bad acne on my face and back. I never like putting chemicals in my body so I started taking ayurvedic medication. My skin has almost cleared up and I don't have to worry about side effects of prolonged use."

"My first thought for any illness is always natural products and I've usually seen benefits. My mother does yoga to manage her blood pressure"

Female household heads are the primary Ayush decision makers – A largely untapped policy channel



Female heads + Self (mostly women) account for 50% decisions which is over half of all Ayush choices in the home.

This suggests that women play a critical role in introducing, sustaining, and transmitting Ayush practices within families.

Future awareness, preventive health, maternal health, nutrition, and community outreach initiatives may therefore achieve greater impact when designed around women as primary household health decision-makers.

The primary caregivers in majority of households are females. They gatekeep the healthcare decisions and hence behaviour change communication should target caregivers, not just patients.

The household Ayush decision is not made by doctors or pharmacists; it is made by women. Any policy that ignores this channel is bypassing the most powerful distribution mechanism Ayush already has.

"My mother is a strong advocate for Homeopathy. We have used it for various things in the family for a long time."

"My mother practices yoga on a daily basis and since childhood we have also seen yoga as a primary exercise. She even introduced my dada dadi to it and it has benefited everyone greatly."

1. Women should be treated as Ayush adoption multipliers, not just beneficiaries
2. Community health workers can become powerful Ayush ambassadors
3. Women can become key actors in Ayush entrepreneurship & distribution

The primary research provides a comprehensive understanding of how Ayush is perceived and utilized across households, patients, clinicians, therapists, wellness providers and international medical tourists. Despite differences among stakeholder groups, the findings converge on several important themes. **First, Ayush is increasingly being utilized beyond preventive healthcare and wellness, with growing adoption for chronic disease management, symptom relief, rehabilitation, lifestyle disorders, mental wellness and long-term health management.** Households reported routine use of Ayush products and home remedies, while clinicians and therapists confirmed rising patient demand and increasing utilization for chronic and recurring conditions. Patients also viewed Ayush as a continuous health management system rather than a one-time treatment option.

The research further indicates that **public acceptance and utilization have advanced more rapidly than the institutional systems required to support future growth.** Across stakeholder groups, respondents consistently identified limited integration with mainstream healthcare, weak referral pathways, uneven digital infrastructure, inadequate diagnostic support, insurance gaps and quality assurance as key constraints. These findings suggest that future policy efforts should focus on strengthening healthcare integration, institutional capacity and service delivery rather than awareness alone.

Another key finding is that **trust in Ayush is already well established, but sustained growth will depend on stronger**

evidence-based credibility. Respondents associated Ayush with holistic care, affordability, personalised treatment and long-term health benefits, while also emphasizing the need for stronger scientific evidence, standardized clinical protocols and accreditation to strengthen institutional confidence and global acceptance.

The household survey revealed that **women are the primary decision-makers for Ayush adoption within families**, while younger adults represent an important growth segment, highlighting opportunities for targeted communication, digital engagement and insurance-supported adoption. International respondents reinforced that **India possesses a distinct competitive advantage as the authentic home of Ayush**, but stressed the importance of international accreditation, quality standards, evidence-based communication and seamless patient journeys to strengthen India's position as a global wellness destination.

Overall, the findings demonstrate that **the next phase of Ayush growth will depend less on increasing awareness and more on strengthening the ecosystem that supports adoption.** Greater healthcare integration, evidence generation, digitalisation, quality assurance, insurance coverage, workforce development and international positioning will be essential to unlocking the sector's full healthcare and economic potential. The consistency of these findings across diverse stakeholder groups provides strong directional validation for the strategic priorities and Vision 2030 roadmap presented in this report.

≡ 10.6 Ayush Facilities Survey

This report also collected primary survey data from 100 Ayush (Ayurveda, Yoga & Naturopathy, Unani, Siddha, Homeopathy) health facilities across four states of Assam (20), Karnataka (42), Kerala (20), and Madhya Pradesh (18). The survey covers facility infrastructure, staffing, medicine procurement and quality, patient load, outreach activity, and integration with mainstream (allopathic) healthcare.

Overall, Ayush services are operational and well-utilised on the ground: 96% of surveyed facilities have a functioning

Ayush OPD, and 96% of respondents believe outreach activities help reduce disease burden in their catchment area. However, the survey also surfaces recurring structural gaps in inpatient (IPD) infrastructure is largely absent, salary parity with allopathic practitioners is a widespread concern, and one in five facilities reported difficulty procuring Ayush medicines.

10.6.1 Key Findings at a Glance

Facilities surveyed: 100, across 4 states (Karnataka largest sample at 42; Madhya Pradesh smallest at 18)

Facility model: 94% Standalone Ayush units; only 6% co-located/Integrated with a larger health centre

Ayush OPD functioning: 96% Yes – near-universal operational OPD services

Dedicated Ayush IPD: Only 2% of facilities have a separate IPD block; just 1 facility reports a functioning Ayush IPD

Separate Ayush pharmacy: 52% have one; 48% do not (medicines dispensed through a shared/general counter)

Adequate Ayush doctors (per sanctioned strength): 83% report adequate availability; gap most visible in Assam

Salary parity: 54% report a salary difference between Ayush and allopathic staff; only 18% report parity

Medicine procurement problems: 20% of facilities faced difficulty procuring Ayush medicines

Essential drug list: 71% of facilities maintain a formal essential-drug list

Dedicated Yoga & Naturopathy budget: Only 37% have a specific allocated budget; 52% have none

Average Ayush staff strength: ≈3.9 personnel per facility (highest in Kerala, ~6.4; lowest in Assam, ~2.3)

10.6.2 Survey Coverage

The survey sample spans four states with markedly different Ayush institutional density. Karnataka contributes the largest share of responses (42%), followed by Kerala and Assam (20% each) and Madhya Pradesh (18%).

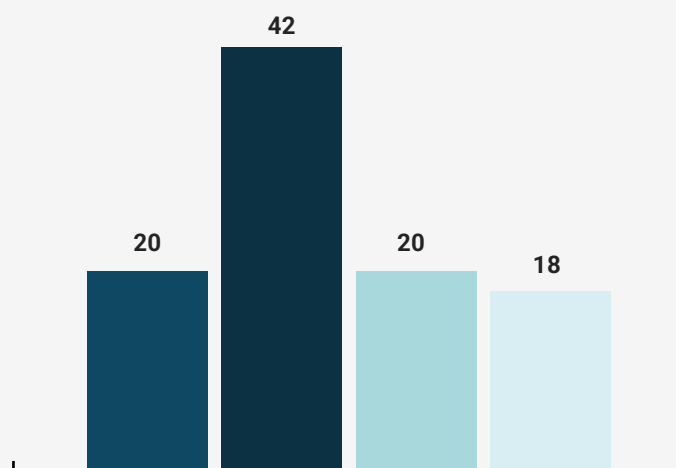


Figure 1: Number of Ayush facilities surveyed, by state (N=100)

State	Facilities Surveyed	Share of Total
 Karnataka	42	42%
 Assam	20	20%
 Kerala	20	20%
 Madhya Pradesh	18	18%
Grand Total	42	100%

The vast majority of surveyed facilities (86%) are located in rural areas, consistent with Ayush's core mandate of extending primary healthcare access in underserved geographies; only 8% are urban, and the remainder are tribal or semi-urban.

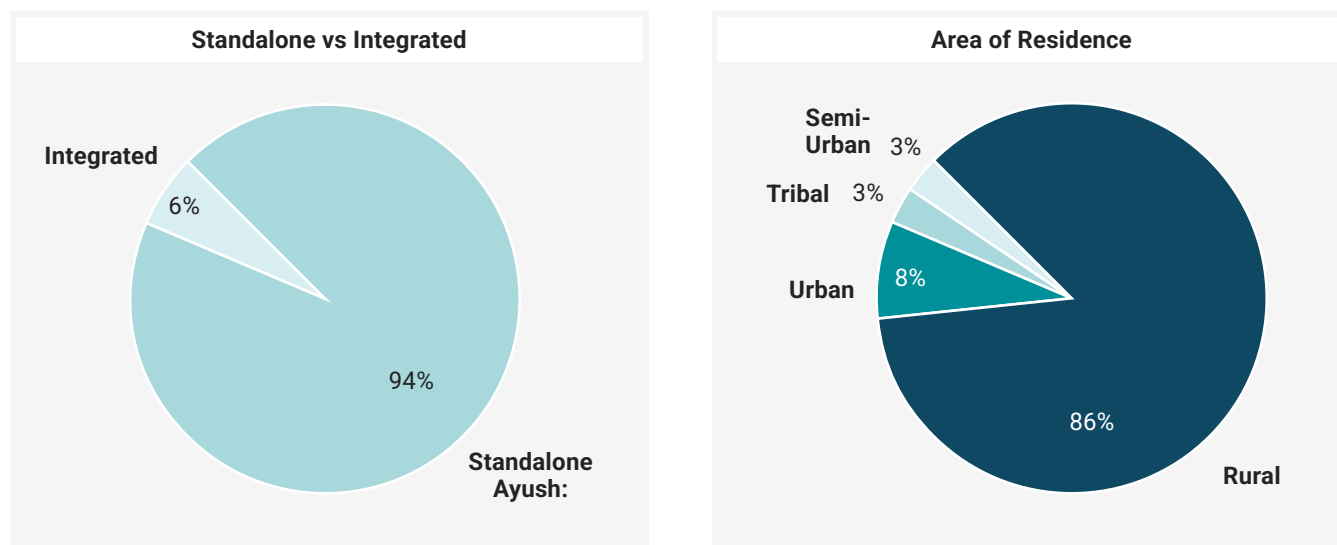


Figure 2: Facility establishment model (left) and area of residence (right)

10.6.3 Facility Infrastructure

94% of surveyed facilities operate as Standalone Ayush units rather than being co-located within a larger allopathic health centre – a pattern fairly consistent across all four states. This standalone model shapes many of the infrastructure and integration findings below.

Ayush Streams in Use

Ayurveda is by far the dominant stream, used as the primary modality in 76 of 100 facilities, followed by Homeopathy (23) and Yoga & Naturopathy (10). Unani and Allopathy-only presence are marginal, reflecting the historical concentration of Ayurveda infrastructure in the surveyed states.

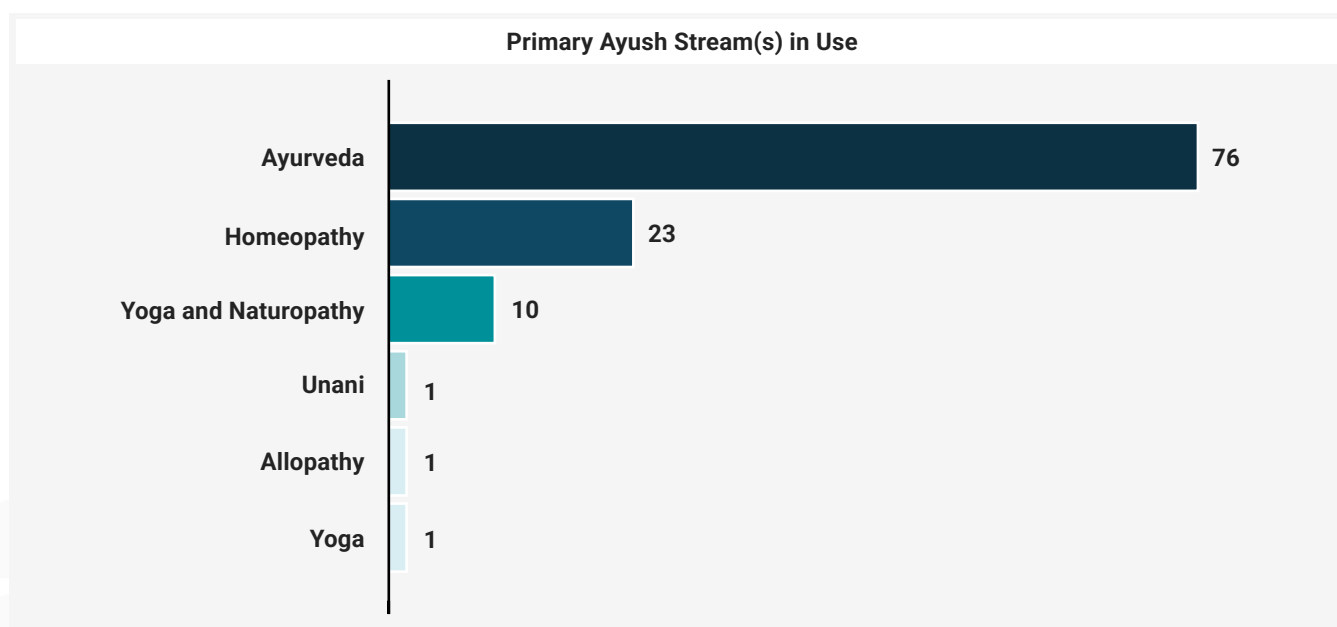
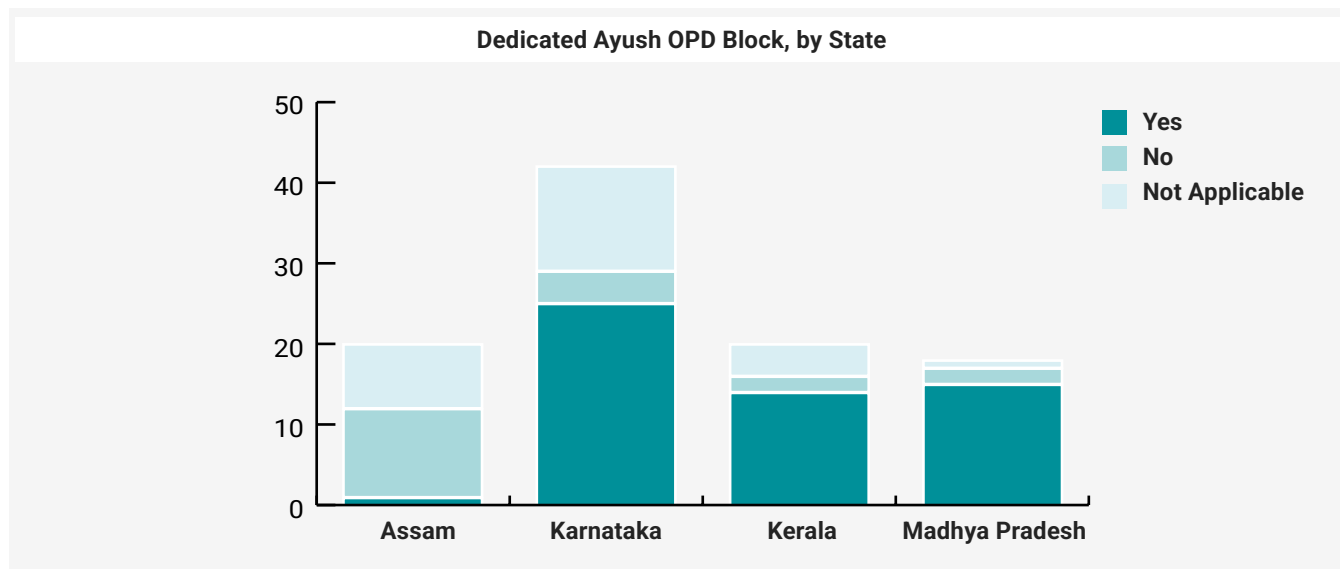


Figure 3: Primary Ayush stream(s) reported (facilities may report more than one)

Dedicated OPD and IPD Blocks

A dedicated Ayush OPD block exists in 55% of facilities overall, but this varies sharply by state: Karnataka, Kerala and Madhya Pradesh mostly have dedicated OPD space, while in Assam only 1 of 20 facilities has a separate OPD block (11 report none, 8 mark it not applicable given their standalone single-room setup).

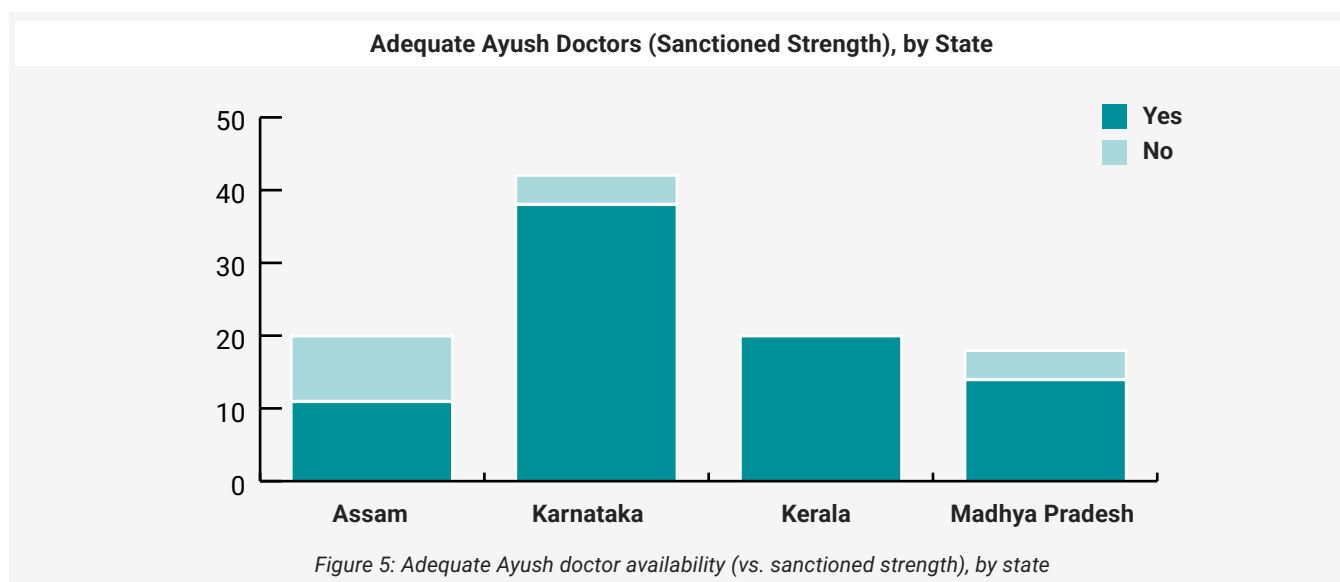


Inpatient (IPD) infrastructure is the most significant gap in the survey. Only 2 facilities nationwide report a dedicated Ayush IPD block, and just 1 facility reports that its Ayush IPD is currently functioning. For 62% of facilities the question is "not applicable" (no IPD exists at all), and a further 37% report a non-functioning IPD. This indicates Ayush service delivery in the sampled facilities is overwhelmingly outpatient focused.

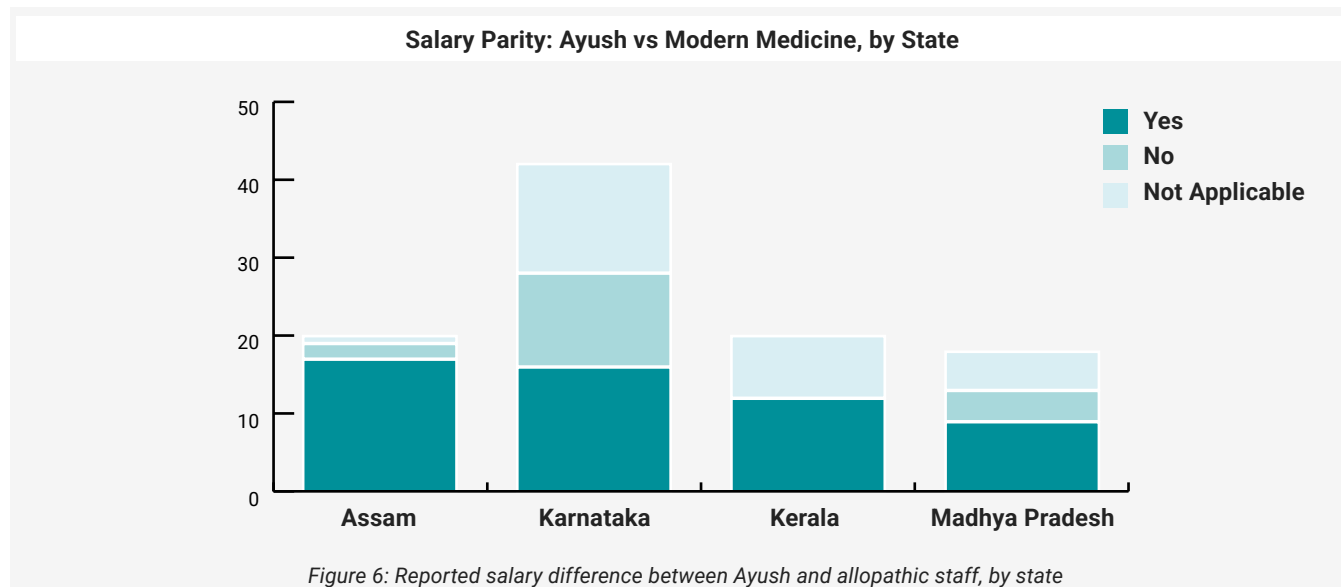
10.6.4 Human Resource

Average Ayush staff strength across all facilities is approximately 3.9 personnel, ranging from a low of 0 to a high of 13 at the busiest facility. Staffing is notably thinner in Assam (average ≈ 2.3) compared to Kerala (≈ 6.4), suggesting uneven distribution of sanctioned posts relative to patient load.

83% of facilities report adequate numbers of Ayush doctors against sanctioned strength — a broadly positive picture, though Assam again lags, with 9 of 20 facilities (45%) reporting inadequate doctor availability.



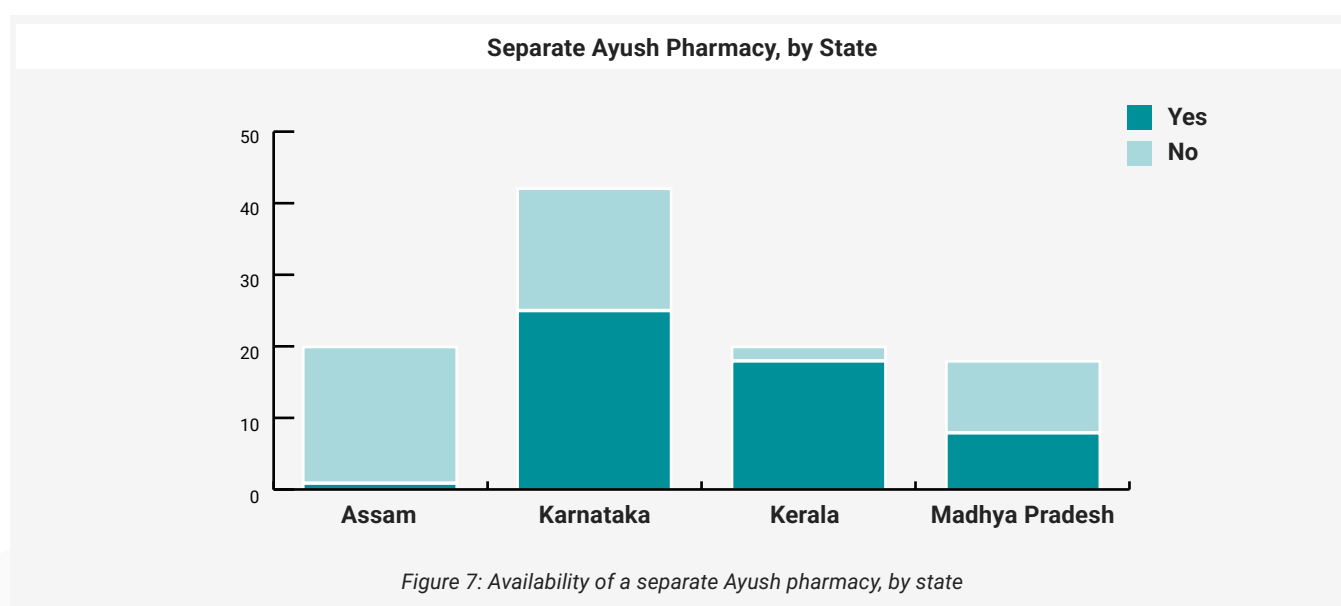
A more persistent concern is compensation parity. 54% of facilities report a salary difference between Ayush and modern-medicine (allopathic) practitioners, with only 18% reporting no difference. This gap is reported across all four states, and is likely to affect retention and motivation of Ayush practitioners, many of whom (as noted qualitatively in the raw responses) also cite the absence of annual increments.



44% of facilities report their Ayush personnel are actively deployed for National Health Mission (NHM) camps, indicating meaningful cross-utilisation of Ayush human resources in broader public health delivery.

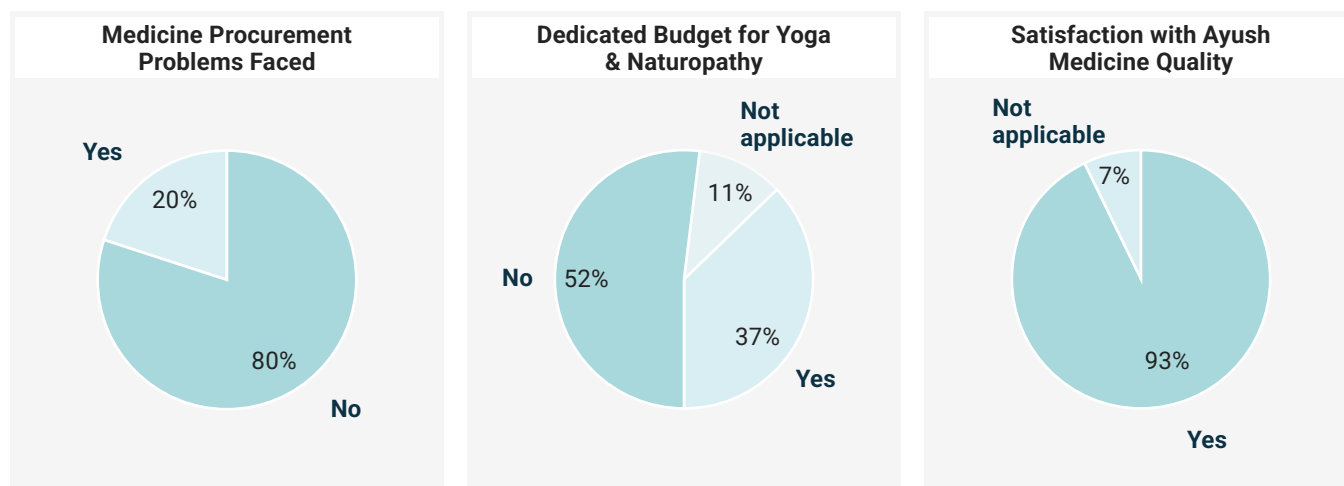
10.6.5 Medicine Supply & Pharmacy Infrastructure

Only 52% of facilities have a separate dedicated pharmacy for Ayush medicines; the remainder rely on a shared counter with allopathic pharmacy or informal arrangements. This is most acute in Assam, where only 1 of 20 facilities has a dedicated Ayush pharmacy.



71% of facilities maintain a formal essential-drug list for Ayush medicines, and one in five facilities (20%) reported difficulty in procuring Ayush medicines – a recurring theme in open-text responses, which cite irregular/insufficient supply from district stores as the primary cause of stock-outs.

Despite supply-side friction, satisfaction with medicine quality is high: 93% of respondents say they are satisfied with the quality of Ayush medicines/drugs received, and 96% report satisfaction with procurement guidelines under the National Ayush Mission (NAM) and National Health Mission (NHM)— suggesting the core issue is supply consistency and volume rather than product quality or policy design.



10.6.6 Gaps to Address

IPD infrastructure is almost entirely absent

A strategic gap if Ayush is intended to expand beyond outpatient/primary care into inpatient and Panchakarma-based therapeutic care.

Salary parity between Ayush and allopathic staff

Only 18% report no difference

A likely retention and morale risk; standardising compensation frameworks merits review.

Budget allocation for Yoga & Naturopathy is inconsistent

Only 37% with a dedicated budget

Ring-fencing wellness-programme funding could help sustain outreach momentum.

Dedicated pharmacy infrastructure 52% & consistent medicine supply should be prioritised

Only 37% with a dedicated budget

Particularly in Assam, where both pharmacy access and OPD block availability lag other states.

State-level disparities — especially Assam's comparatively lower staffing, infrastructure, and pharmacy scores

Suggest a need for more equitable resource distribution across states rather than a uniform national approach.

From Managing Diabetes to Rediscovering Life:

Rev. Deepak Edward's Ayush Journey



At the age of 40, Rev. Deepak Edward, a respected spiritual leader in Delhi, was facing a challenge shared by millions of Indians and living with diabetes.

Despite adhering to prescribed medication, strict dietary restrictions, and regular monitoring, maintaining stable blood sugar levels remained difficult. The condition gradually affected not only his physical health but also the energy and vitality he needed to serve his congregation and community. Seeking an alternative approach, he visited an Ayurvedic hospital and research institute in Delhi. Unlike his previous experiences, the care extended beyond symptom management. The clinical team developed a personalised treatment plan based on his lifestyle, dietary habits, stress levels, and overall health, integrating Ayurvedic medicines, yoga, dietary counselling, and lifestyle modifications.

Within a few months, he experienced a significant improvement. His blood sugar levels became more stable, his energy levels improved, and he regained confidence in managing his condition. More importantly, the holistic

approach enhanced his overall physical and mental well-being while remaining affordable and sustainable as part of his daily routine.

Today, Rev. Deepak continues to lead his congregation with renewed enthusiasm and has become a strong advocate for preventive healthcare. His experience has inspired many members of his community to explore healthier lifestyles and the role of Ayush in managing chronic diseases. His journey illustrates how evidence-informed Ayush interventions can complement conventional care, improve quality of life, and empower individuals to take greater ownership of their health. It also demonstrates the transformative potential of integrating Ayush into India's broader healthcare ecosystem for addressing the growing burden of lifestyle diseases.

"For years, I was trying to control my diabetes. Through Ayush, I learned how to improve my overall health. The medicines helped, but it was the personalised care, yoga, lifestyle guidance, and holistic approach that truly transformed my life. Ayush gave me confidence, balance, and hope. If more people become aware of its benefits, it can help build healthier individuals, stronger families, and healthier communities."

From Symptom Management to Life Transformation: How India's Ayush Systems Changed Michael's Health Journey



Michael, a 30-year-old business consultant from Milan, Italy, had spent years battling hypertension, chronic stress, and poor sleep. Despite access to some of Europe's most advanced healthcare systems, his life had become a cycle of consultations, medications, and temporary relief.

While treatments helped control his symptoms, they never addressed the root causes of his health challenges. Over time, Michael felt that his illnesses were being managed, and his health began affecting both his professional and personal life. Michael started looking beyond conventional treatment. Through online research and recommendations from friends, he discovered India's Ayush systems. What resonated most with him was their focus on holistic healing and an approach that sought not only to treat disease but also to restore balance, prevent future illness, and improve quality of life.

Encouraged by India's simplified e-Visa process, Michael decided to travel to India and seek care through Ayurveda and Yoga. The experience was unlike anything he had encountered before. Instead of focusing solely on medical reports and prescriptions, doctors took time to understand his lifestyle, dietary habits, stress levels, sleep patterns, and emotional well-being. His treatment plan combined

Ayurvedic therapies, personalised nutrition, yoga, daily routines, and long-term wellness guidance.

In last two months, Michael began noticing changes that extended far beyond clinical indicators. His sleep improved, stress reduced, energy levels increased, and he developed healthier habits that he could sustain independently. More importantly, he felt empowered to take ownership of his health for the first time in many years.

Today, while receiving care at an Ayurvedic hospital in Delhi, Michael sees India as more than a medical destination. He views it as a global leader in holistic and preventive healthcare. In a world facing rising chronic diseases, mental stress, lifestyle disorders, and escalating healthcare costs, he believes Ayush offers a valuable model that combines affordability, effectiveness, and long-term wellness.

For Michael, Ayush was not simply a treatment option, but it was a transformative journey that restored his confidence, improved quality of life, and changed the way he understands health itself.

From Conventional Farming to High-Value Medicinal Crops: The Journey of Dr. Dhruvraj Godara



At 48, Dr. Dhruvraj Godara, a progressive farmer from Hanumangarh, Rajasthan, had spent decades cultivating conventional crops.

While farming provided a stable livelihood, rising input costs, fluctuating market prices, and declining profitability made it increasingly difficult to generate sustainable income from traditional agriculture alone. Like many farmers, he began searching for opportunities that could improve farm returns without significantly increasing production costs.

His turning point came when he participated in a medicinal and aromatic plants training programme conducted by the Central Council for Research in Ayurvedic Sciences (CCRAS) in collaboration with the Regional Ayurveda Research Institute (RARI), Lucknow. The programme introduced farmers to the growing demand for medicinal plants, scientific cultivation practices, value-chain linkages, and the expanding opportunities created by India's rapidly growing Ayush industry.

Inspired by the training, Dr. Godara adopted an innovative intercropping model by cultivating lemongrass alongside

his date palm plantation. The diversification transformed his farm economics. Lemongrass provided an additional source of income, improved land utilisation, and reduced dependence on a single crop, while creating a reliable supply of quality raw material for the Ayush manufacturing sector. Through technical guidance and market linkages, he was able to integrate his farm into the medicinal plant value chain.

Today, Dr. Godara is not only earning higher and more resilient farm incomes but has also become a local advocate for medicinal plant cultivation. His success has encouraged neighbouring farmers to explore high-value medicinal and aromatic crops as viable alternatives to conventional farming.

His journey demonstrates how capacity building, scientific extension services, and stronger market linkages can transform farmers from traditional cultivators into partners in India's Ayush value chain. As demand for quality medicinal raw materials continues to rise, thousands of similar farmers can play a pivotal role in strengthening domestic supply chains, reducing import dependence, enhancing rural livelihoods.

≡ "Effective Treatment, But the Journey Should Be Easier"

The Experience of Sunita Sharma



Sunita Sharma, a 38 year-old homemaker from Jaipur, has been suffering from chronic knee and joint pain for several years. After hearing positive experiences from friends, she started visiting the National Institute of Ayurveda (NIA), Jaipur for Ayurvedic treatment.

Over time, the medicines and lifestyle advice significantly reduced her pain, improved her mobility, and enabled her to resume many of her daily activities without depending heavily on painkillers.

However, every hospital visit remained physically exhausting.

On one of her recent follow-up visits, Sunita reached the hospital at 11:30 a.m. By then, the outpatient department was already crowded, and her registration number was 1497, reflecting the large number of patients seeking care each day. She spent nearly 25 minutes waiting at the registration counter before receiving her OPD slip. She then joined another long queue outside the consultation room, where she waited for almost an hour before meeting the physician. After the consultation, she had to stand in line again for another 30 minutes at the pharmacy to collect her medicines.

Although the entire process took more than two hours, Sunita remained satisfied with the quality of care. She believes the

doctors listen carefully, the medicines are effective, and the treatment has genuinely improved her quality of life. Yet, she feels that the long waiting times and overcrowding make every visit physically demanding, particularly for elderly patients and those suffering from chronic pain.

Her experience reflects a broader reality across many high-volume Ayush institutions. As demand for Ayush services continues to rise, infrastructure and human resource capacity must expand alongside patient volumes. Additional registration counters, more consultation rooms, greater availability of clinicians, expanded pharmacy counters, digital appointment and queue management systems, and strengthened front-line support staff can substantially improve patient experience without compromising the quality of care.

Sunita's story demonstrates that the challenge is no longer demand for Ayush, it is the capacity to serve that demand efficiently. Investing in hospital infrastructure, workforce expansion, and digital patient management will be critical for transforming Ayush institutions into modern, patient-centric centres capable of supporting India's vision of mainstreaming Ayush within the healthcare system.

Chapter:11

System Perspective & Interlinkages Across Pillars

The USD 213 billion Ayush economy is not the sum of Seven independent pillars; it is the product of their systemic interaction. Understanding how the Seven pillars reinforce, constrain, and amplify one another is essential for prioritising investments and sequencing interventions.

This chapter will give the answer to the question:

"Why is USD 213 billion achievable only when all Seven pillars grow together rather than independently?"

11.1 Ayush as an Integrated Economic Ecosystem

The Seven pillars presented in this report, mainly manufacturing, exports, healthcare integration, wellness tourism, and research & digitalisation should not be viewed as standalone sectors. Together, they form an interconnected economic ecosystem where growth in one pillar creates multiplier effects across the others.

The Ayush value chain begins with medicinal plant cultivation and raw material sourcing, progresses through

manufacturing and product development, extends into healthcare delivery and wellness services, and ultimately reaches global consumers through exports and medical value travel. Research, evidence generation, and digital infrastructure act as the enabling layer that strengthens credibility, accessibility, scalability, and global acceptance across the entire ecosystem.

Several indicators highlight the scale and interconnected nature of this ecosystem:

- More than 9,000 licensed Ayush manufacturing units and over 92,000 Ayush-related MSMEs form the industrial backbone of the sector.
- India has an estimated 9.26 lakh registered Ayush practitioners, supported by over 530 Ayush colleges and approximately 50,000 graduates annually, creating one of the world's largest traditional medicine workforces.
- The public health ecosystem includes over 1.75 lakh Ayushman Arogya Mandirs, 12,500+ Ayush Health & Wellness Centres, 3,300+ government Ayush hospitals, and 37,000+ dispensaries, providing a substantial service delivery network.
- India remains one of the world's largest producers of medicinal plants and herbal raw materials, supplying both domestic manufacturing and international markets.
- The establishment of the WHO Global Traditional Medicine Centre (WHO-GTMC) in Jamnagar and the development of the Ayush Grid position India at the forefront of traditional medicine research, digitalisation, and global collaboration.

The strategic significance of Ayush lies in these interconnections. Higher-quality manufacturing strengthens exports; stronger research improves insurance acceptance and healthcare integration; healthcare utilisation drives demand for medicines and services; wellness tourism enhances India's global brand; and digital platforms enable scale across all pillars.

The \$213 billion vision will therefore be achieved not through isolated sectoral growth, but through the coordinated expansion of a fully integrated Ayush ecosystem where each pillar reinforces and amplifies the others.

11.2 The Multiplier Effect Across Pillars

A defining characteristic of the Ayush economy is that investments made in one pillar generate benefits across

multiple pillars. Unlike conventional sectors where growth often remains confined within a specific industry, the Ayush

ecosystem operates through a series of interconnected feedback loops. As a result, strategic investments create multiplier effects that enhance sector-wide productivity, competitiveness, and economic value creation.

For example, investments in research and evidence generation not only improve scientific credibility but also strengthen insurance acceptance, support regulatory approvals, enhance export competitiveness, and improve consumer confidence in Ayush products and services. Similarly, expanding insurance coverage increases healthcare utilisation, which in turn drives demand for

medicines, therapies, wellness services, and trained practitioners.

The same inter connectedness is visible across the ecosystem. Improvements in manufacturing quality strengthen India's export position and global brand reputation. Growth in wellness tourism increases international awareness of Ayush systems, creating downstream demand for products, services, and exports. Digital platforms improve efficiency, accessibility, data availability, and service delivery across healthcare, research, education, and commerce.

The Multiplier Effect Across Pillars

One dollar invested in one pillar creates value across multiple pillars.



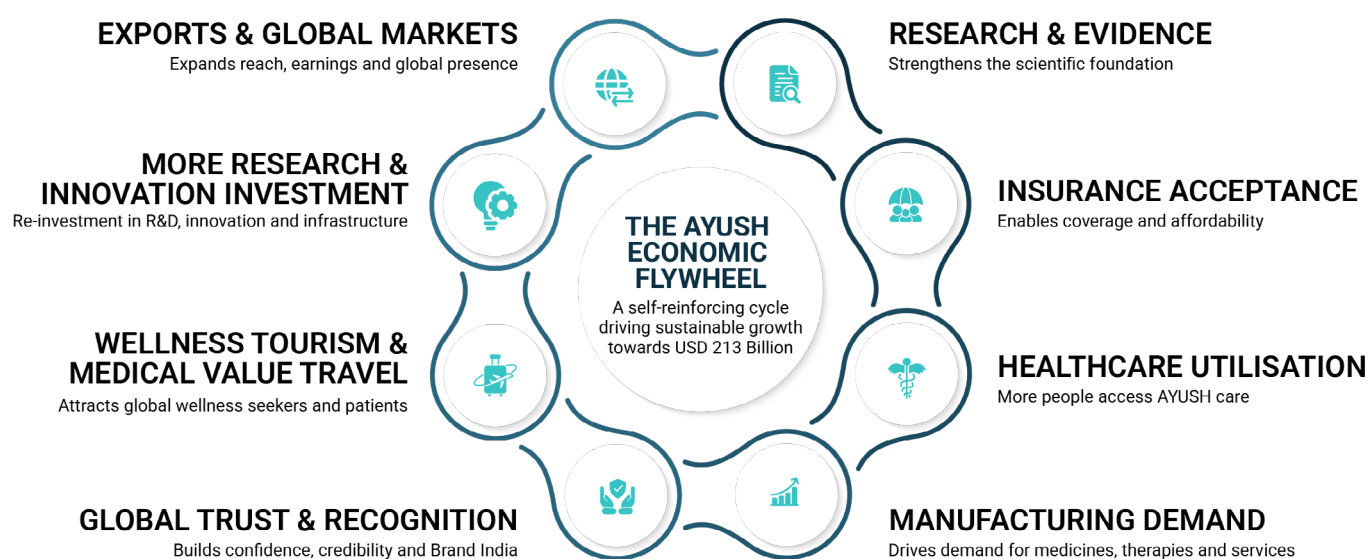
The implication is significant: **every rupee invested in strengthening Ayush creates value beyond the immediate sector of investment.** This multiplier effect is what distinguishes Ayush from the conventional healthcare sector. It is simultaneously a healthcare system, manufacturing

industry, export opportunity, wellness economy, research ecosystem, and employment generator. Consequently, the pathway to a \$213 billion Ayush economy depends not on isolated sectoral interventions, but on coordinated investments that unlock growth across the entire ecosystem.

11.3 The Ayush Economic Flywheel

The growth of the Ayush sector is not linear, but it is self-reinforcing. Progress in one area creates momentum in another, generating a virtuous cycle that continuously strengthens the ecosystem. This interconnected dynamic can be viewed as the Ayush Economic Flywheel, where each success factor fuels the next and accelerates overall sector growth.

The flywheel begins with research, evidence generation, and scientific validation, which improves the credibility of Ayush therapies and products. Greater evidence enables wider insurance acceptance and reimbursement, making Ayush more affordable and accessible to millions of patients. As coverage expands, healthcare utilization increases, driving demand for Ayush medicines, therapies, practitioners, hospitals, and wellness services.



This trust, in turn, attracts more international patients and wellness seekers, accelerating wellness tourism and medical value travel. Increased revenues, global visibility, and market demand then

drive further investments into research, innovation, digitalisation, and evidence generation completing the cycle and setting the flywheel in motion once again.

11.4 Employment and Livelihood Impact Across the Ayush Value Chain

Beyond its contribution to healthcare and wellness, Ayush represents a significant employment and livelihood opportunity for India. Unlike capital-intensive sectors that generate limited employment per unit of investment, the Ayush ecosystem is inherently labour-intensive, creating opportunities across agriculture, manufacturing, healthcare delivery, wellness services, tourism, education, research & development and digital health.

The sector's employment impact extends from medicinal plant farmers and collectors in rural areas to doctors,

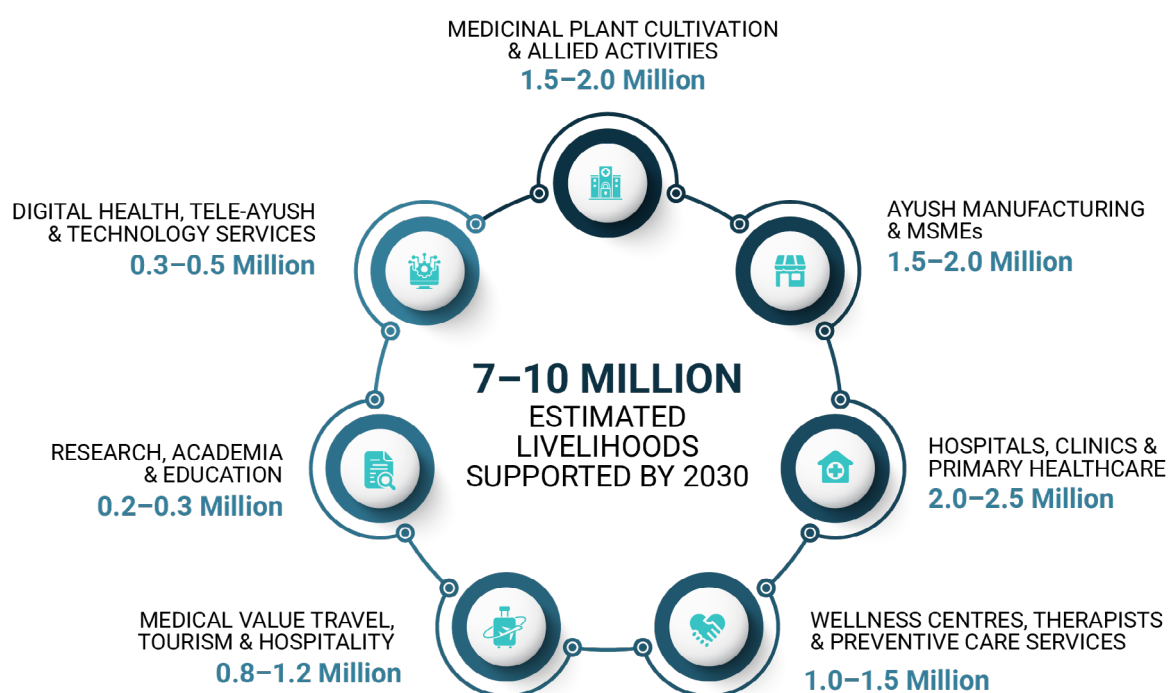
therapists, researchers, hospitality professionals, and technology specialists in urban centres. As the Ayush economy expands towards the \$213 billion vision, its employment footprint is expected to grow proportionately across the value chain.

Using benchmark employment multipliers from the pharmaceutical, healthcare services, wellness tourism, MSME, and medicinal plant cultivation sectors, the sector could support **7–10 million livelihoods by 2030**, including both direct and indirect employment.

Ayush Employment Potential by 2030

(INDICATIVE ESTIMATES)

Based on projected growth across manufacturing, healthcare, wellness tourism, exports and digital health ecosystems.



WHY AYUSH MATTERS BEYOND HEALTHCARE



Rural
Livelihoods



Women-Led
Entrepreneurship



MSME
Growth



Skilled
Employment



Tourism &
Hospitality Jobs



Research &
Innovation
Ecosystem

11.5 Employment Multiplier Across the Ecosystem

The employment impact is not confined to direct jobs alone. Expansion of Ayush manufacturing stimulates demand for packaging, logistics, testing laboratories, and distribution networks. Growth in wellness tourism generates employment across hospitality, transport, local enterprises, and community-based services. Similarly, increased medicinal plant cultivation creates income opportunities for farmers, Farmer Producer Organisations (FPOs), tribal communities, and rural entrepreneurs.

Particularly noteworthy is the sector's ability to generate employment in regions where conventional industrial opportunities are limited. Medicinal plant cultivation,

wellness tourism, and community healthcare services offer strong livelihood opportunities across the Himalayan region, North-East, tribal belts, and other rural geographies.

The Ayush economy should therefore be viewed not only as a healthcare and wellness sector, but as a powerful engine for employment generation, rural prosperity, women-led entrepreneurship, and inclusive economic growth. If the \$213 billion vision is achieved, Ayush could emerge as one of India's largest healthcare-linked employment ecosystems, supporting 7–10 million livelihoods across the value chain by 2030.

11.6 Methodology for Employment Estimates

The projections are based on scenario-based estimates derived from:

Expansion of Ayush manufacturing from USD 24 billion to USD 55 billion

Growth of healthcare and insurance-linked services from USD 20–26 billion to USD 60–70 billion

Expansion of wellness tourism from USD 19.4 billion to USD 30–35 billion

Current base of 9,000+ manufacturing units, 92,000+ Ayush MSMEs, and 9.26 lakh registered practitioners

Employment intensity benchmarks from the pharmaceutical industry, healthcare services, wellness economy, tourism sector, and medicinal plant value chains

These estimates should be interpreted as indicative employment potential under a high-growth scenario and are intended to illustrate the broader socioeconomic impact of

the Ayush ecosystem rather than provide precise workforce forecasts.

11.7 Private Sector and Investment Ecosystem

The transition towards a \$213 billion Ayush economy will be driven as much by private capital as by public policy. While government initiatives are creating an enabling environment, large-scale growth across manufacturing, healthcare, wellness tourism, exports, and digital innovation will require significant private-sector participation.

As outlined in earlier chapters, achieving the manufacturing target of \$55 billion by 2030 is estimated to require \$18–22 billion in total investment, of which approximately \$14–18 billion will need to come from private sources.

The investment ecosystem spans multiple stakeholders:

Large Ayush companies such as Dabur, Patanjali, Himalaya, Emami (Zandu), and Baidyanath will drive capacity expansion, product innovation, and export growth.

Pharmaceutical companies can accelerate standardisation, clinical validation, and global market access through their expertise in quality systems and regulatory compliance.

FMCG companies are expanding demand for Ayurvedic, herbal, nutraceutical, and preventive healthcare products across mass consumer markets.

Private equity and venture capital funds are increasingly investing in wellness, digital health, nutraceuticals, and preventive care businesses.

Startups, with over **900 DPIIT-recognised Ayush ventures**, are bringing innovation across telemedicine, AI, wellness platforms, diagnostics, and personalised healthcare.

Foreign investors, supported by **100% FDI under Ayush manufacturing**, represent a significant source of capital, technology, and international market access.

11.8 Key Investment Priorities

- GMP-compliant manufacturing and export infrastructure
 - Medicinal plant cultivation and supply-chain development
 - Ayush hospitals, clinics, and integrated care facilities
 - Wellness tourism and medical value travel infrastructure
 - Research, clinical validation, and innovation
 - Digital health, AI, and Ayush Grid-enabled platforms
- The opportunity is no longer constrained by demand. The sector now requires \$14–18 billion of catalytic private investment to build globally competitive manufacturing, healthcare, wellness, and innovation ecosystems. Mobilising this capital successfully will be critical to transforming Ayush from a high-potential sector into a major engine of economic growth, employment generation, and global healthcare leadership.

11.9 Risks and Critical Success Factors

The pathway to a \$213 billion Ayush economy is both achievable and compelling. However, realizing this vision will require addressing several structural challenges while simultaneously strengthening the key enablers that underpin

long-term growth. The future trajectory of the sector will depend on how effectively these risks are managed and these success factors are scaled.

11.10 Key Risks

Lack of Standardisation

Variability in raw materials, manufacturing practices, treatment protocols, and service quality can limit consumer confidence and international acceptance.

Insufficient Evidence Generation

The absence of large-scale clinical validation and outcome-based research may constrain insurance integration, regulatory approvals, and global market access.

Raw Material Constraints

Fragmented medicinal plant supply chains and inconsistent quality can affect manufacturing scalability and export competitiveness.

Regulatory Fragmentation

Differences in standards and regulatory frameworks across domestic and international markets can create barriers to growth and investment.

Workforce and Capacity Gaps

While India has a large Ayush workforce, deployment challenges, skill standardisation, and integration readiness remain important considerations.

Critical Success Factors for Ayush Vision 2030

Five Strategic Enablers for a Strong Ayush Economy by 2030



The challenge facing Ayush is not one of demand, heritage, or market potential. The decisive factor will be the sector's ability to translate its inherent strengths into a globally credible, evidence-driven, quality-assured, and digitally

enabled ecosystem. If these critical success factors are addressed systematically, Ayush can emerge as one of India's most powerful engines of healthcare innovation, economic growth, and global influence.

Chapter:12

Implementation Roadmap (2026–2030)

Achieving the vision of a \$213 billion Ayush economy by 2030 and strengthening Ayush as a first choice of wellness will require a shift from strategy to execution. While the opportunities across manufacturing, exports, healthcare integration, wellness tourism, and research have been established, their realisation depends on coordinated action, targeted investments, institutional strengthening, and policy alignment.

The period from 2026–2030 represents a decisive phase for scaling Ayush into a globally competitive healthcare,

wellness, and economic ecosystem. Success will require collaboration between government, industry, academia, healthcare providers, investors, and international partners to accelerate implementation across all Seven pillars.

This roadmap outlines a phased approach with clear priorities, milestones, and enabling actions to drive sector growth, strengthen global competitiveness, generate employment, expand exports, and position India as the world's leading hub for traditional medicine and wellness.

12.1 Phasing the Journey (2026–2030)

A phased approach that balances foundational reforms, ecosystem expansion, and global positioning will set the path to achieve the goal. The roadmap is structured across

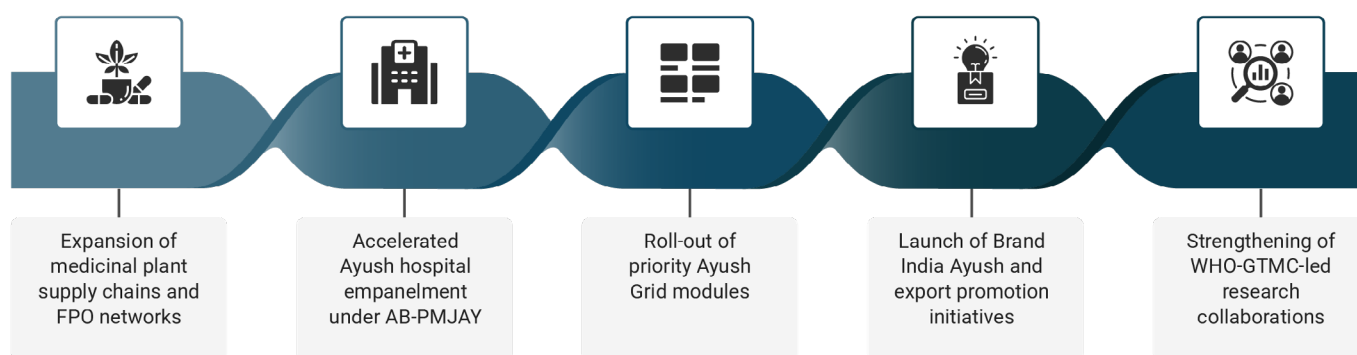
three sequential phases, with each phase building on the achievements of the previous one.

Phase I: Foundation Building (2026)

The first phase focuses on strengthening the core enablers required for long-term growth. Priority actions include expanding medicinal plant cultivation, accelerating GMP compliance among manufacturers, strengthening research and clinical evidence generation, operationalising key digital

platforms under the Ayush Grid, and initiating large-scale integration of Ayush services within public healthcare and insurance systems. This phase should also establish the policy, regulatory, and institutional frameworks needed to attract private investment and support exports.

Phase I: Foundation Building (2026)



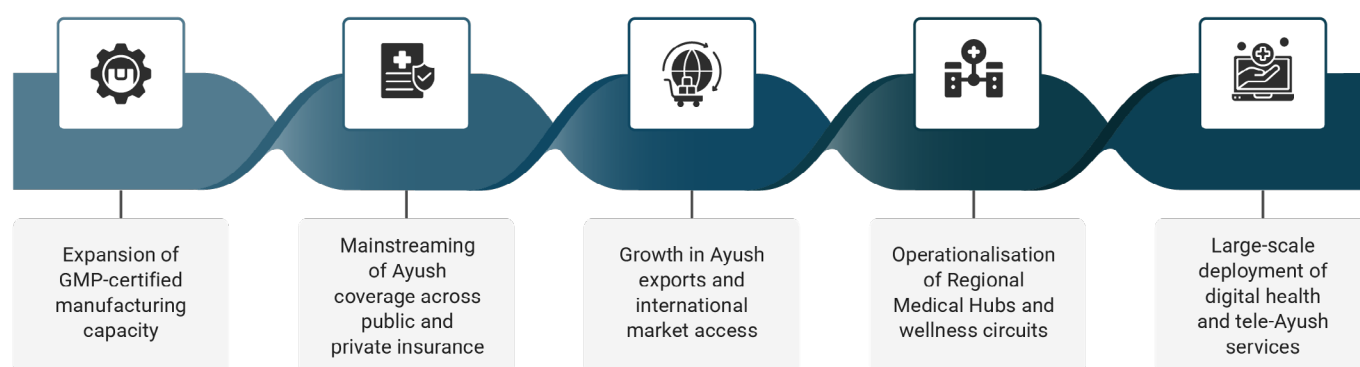
Building Strong Foundations for a **USD 213 Billion** Ayush Economy

Phase II: Scale-Up and Integration (2027–2028)

The second phase focuses on scaling successful interventions and deepening ecosystem integration. Manufacturing capacity expansion, wider insurance coverage, growth of Ayush hospitals and wellness centres, increased export penetration, and deployment of additional

Ayush practitioners become key priorities. This phase should also witness significant private-sector participation across healthcare, wellness tourism, digital health, and manufacturing.

Phase II: Scale-Up & Integration (2027–2028)



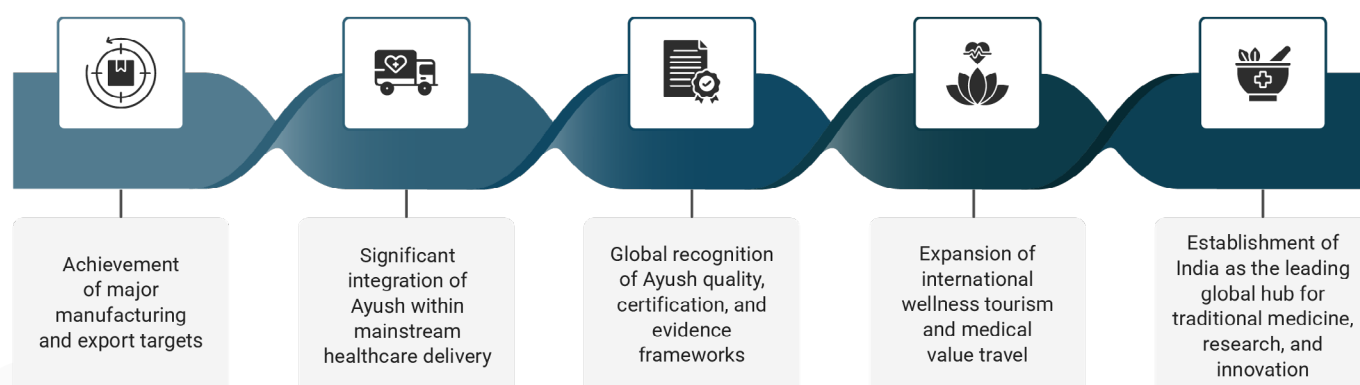
Scaling Impact. Integrating Systems. Delivering Value Towards a **USD 213 Billion** Ayush Economy

Phase III: Global Leadership (2029–2030)

The final phase focuses on consolidating India's position as the global leader in traditional medicine and wellness. By this stage, Ayush should operate as an integrated healthcare,

manufacturing, export, tourism, and innovation ecosystem supported by strong global branding, international partnerships, and robust evidence systems.

Phase III: Global Leadership (2029–2030)



Leading the World in Traditional Medicine. Towards a **USD 213 Billion** Ayush Economy

The roadmap is designed to move Ayush from foundation building to large-scale integration and ultimately to global leadership. Success will depend on sustained execution,

coordinated stakeholder action, and continuous investment across all Seven pillars of the ecosystem.

12.2 Pillar-wise Milestone Matrix

The successful implementation of Ayush Vision 2030 requires clear, measurable milestones across all Seven strategic pillars. The milestone matrix below provides a

structured framework for tracking progress and ensuring alignment between policy interventions, institutional actions, and economic outcomes.

Pillar	Foundation (2026)	Scale up (2027-28)	Leadership (2029-30)
Manufacturing	●	●	\$55 Bn
Exports	●	●	\$1.2 Bn
Service Sector	●	●	\$99 Bn
Healthcare	●	●	Mainstream Integration
Wellness	●	●	Global Destination
Research	●	●	Global Innovation Hub

Together, these outcomes create the foundation for achieving the broader vision of a \$213 billion Ayush economy by 2030,

positioning India as the global leader in traditional medicine, wellness, and integrative healthcare.

12.3 Monitoring and Evaluation Mechanism

The successful implementation of Ayush Vision 2030 will require a robust monitoring and evaluation (M&E) framework to track progress, ensure accountability, and enable timely course correction. Given the multi-sectoral nature of the Ayush ecosystem, monitoring should extend beyond expenditure tracking to focus on outcomes, impact, and milestone achievement across all Seven strategic pillars.

A centralised, data-driven review mechanism anchored by the Ministry of Ayush, with participation from relevant ministries, state governments, industry bodies, and research institutions, will be critical for maintaining implementation momentum.

12.4 Key Performance Indicators (KPIs)

A structured KPI framework should be established to measure progress against the \$213 billion vision.

 MANUFACTURING & INDUSTRY	Manufacturing output	GMP-certified units	Medicinal plant cultivation area	Private investment mobilised	
 EXPORTS & GLOBAL MARKETS	Export value	Number of export destinations	Share of value-added products	International certifications obtained	
 HEALTHCARE & INSURANCE	Ayush hospitals empanelled	Insurance-covered beneficiaries	Practitioner deployment	Patient utilisation levels	
 WELLNESS TOURISM	International wellness visitors	Wellness tourism revenue	Accredited wellness facilities	Medical value travel inflows	
 RESEARCH & DIGITALISATION	Clinical studies completed	Research publications	Tele-Ayush consultations	Ayush Grid adoption	International collaborations

12.5 Data Systems and Digital Monitoring

The **Ayush Grid** should serve as the primary digital backbone for monitoring sector performance. Integration with ABDM, hospital information systems, insurance platforms, export databases, and research repositories can enable near real-time tracking of key indicators.

A unified **Ayush Dashboard** may be developed to consolidate data across ministries, states, healthcare facilities, research institutions, and industry stakeholders. This would support evidence-based decision-making and improve transparency across the ecosystem.

12.6 Review and Governance Framework

A three-tier review structure is recommended:

Quarterly Reviews

- Monitoring of operational KPIs and milestone progress
- Review of implementation bottlenecks and corrective actions

Annual Performance Reviews

- Assessment of pillar-wise achievements against annual targets.
- Evaluation of investment mobilisation, employment generation, exports, and healthcare outcomes.

Mid-Term Strategic Review (2028)

- Comprehensive assessment of progress toward the 2030 vision.
- Recalibration of targets, policies, and investment priorities based on emerging opportunities and challenges.

What gets measured gets managed. A transparent, technology-enabled, and outcome-focused monitoring framework will be essential to ensure that the Ayush Vision 2030 remains on track. By combining clearly defined KPIs, integrated digital data systems, and regular performance reviews, India can create a governance model capable of delivering sustained growth across the entire Ayush ecosystem.



Chapter:13

Policy Recommendations & Action Agenda

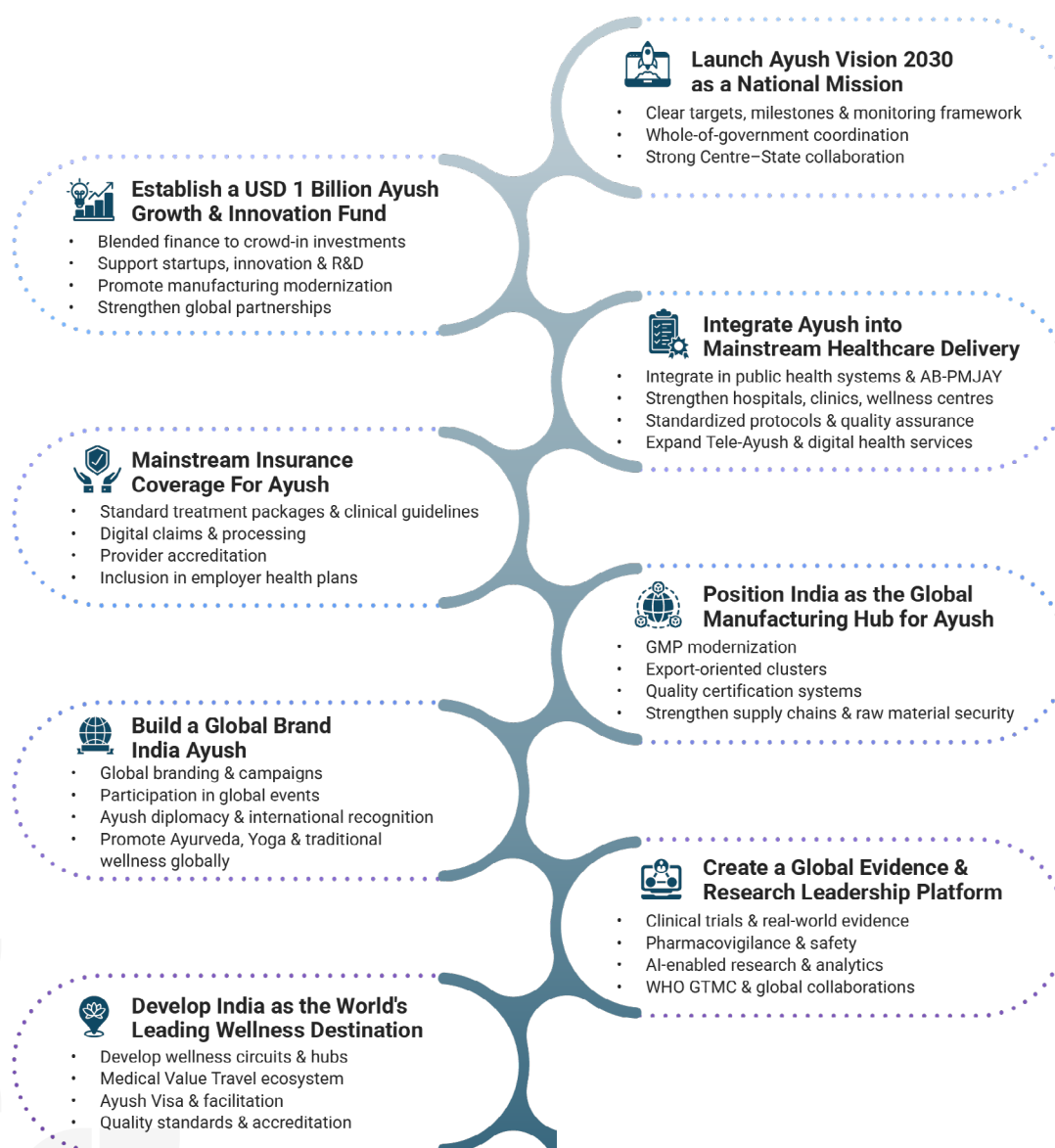
13.1 From Potential to Global Leadership

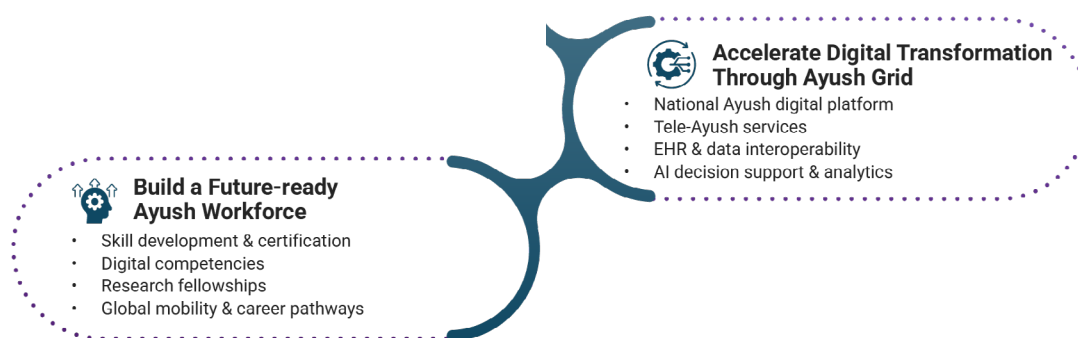
India stands at a pivotal moment in the evolution of the Ayush sector. The foundations for growth are already in place: a rich traditional knowledge base, one of the world's largest practitioner networks, expanding manufacturing capacity, growing domestic demand, increasing global acceptance, and unprecedented policy support. The challenge now is not whether Ayush can grow, but whether India can execute a coordinated strategy capable of transforming this

civilisational asset into a globally competitive healthcare, wellness, and economic ecosystem.

The recommendations outlined in this chapter are designed to accelerate progress across the Seven strategic pillars and collectively support the realisation of the \$213 billion Ayush Vision by 2030.

13.2 National Level Action Agenda: Ten Strategic Priorities





Impact by 2030: USD 213 Billion Ayush Economy

Ayush Manufacturing \$55 BILLION Strong domestic industry & global competitiveness	Service Sector \$99 BILLION Healthcare, wellness & integrative services	Wellness Tourism & Medical Value Travel \$1.2 BILLION Global wellness destination & MVT leadership	Exports (Ayush & Herbal Products) \$2.05 BILLION Growing exports & international market share	Yoga Economy \$15 BILLION Yoga as a global wellness & lifestyle movement	Ayush Education & Skill Development \$0.6 BILLION Education exports & skilled workforce ecosystem	International Ayush Services \$40 BILLION Global services leadership & soft power expansion
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13.3 High-Impact Actions for the First 24 Months

The following actions should receive immediate priority during 2026–2027:

Quick Wins

Fast-track Ayush hospital empanelment under PMJAY	Establish Ayush Export Facilitation Cell
Launch Brand India Ayush internationally	Launch National Ayush Accreditation Framework
Operationalize priority Ayush Grid modules	Initiate Regional Medical Hubs and Wellness Circuits
Roll out standard Ayush insurance packages	Create Ayush Startup and Innovation Challenge Fund
Expand WHO-GTMC collaborative research programmes	Establish Ayush Vision 2030 Monitoring Dashboard

13.4 The Strategic Imperative

The Ayush opportunity extends far beyond healthcare. It represents a pathway to economic growth, employment generation, rural prosperity, global influence, medical diplomacy, wellness leadership, and innovation-led development. Few sectors possess the unique combination of cultural heritage, market demand, policy support, and global relevance that Ayush enjoys today.

If India can successfully execute the reforms outlined in this report, Ayush can evolve from a traditionally respected

system of medicine into a globally recognized economic and healthcare powerhouse supporting millions of livelihoods, improving health outcomes, strengthening India's soft power, and contributing to the creation of a \$213 billion Ayush economy by 2030.

The vision is ambitious, but the foundations are already in place. The decade ahead must be defined by execution, scale, and global leadership.

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