3.1 INTRODUCTION

According to Subhuti Dharmananda, Ayurvedic medicines are produced by several thousand companies in India, but most of them are quite small, including numerous neighbourhood pharmacies that compound ingredients to make their own remedies. It is estimated that the total value of products from the entire Ayurvedic production in India is on the order of one billion dollars (U.S.). The industry has been dominated by less than a dozen major companies for decades, joined recently by a few others that have followed their lead, so that there are today 30 companies doing a million dollars or more per year in business to meet the growing demand for Ayurvedic medicine. The products of these companies are included within the broad category of "fast moving consumer goods" (FMCG; which mainly involves foods, beverages, toiletries, cigarettes, etc.). Most of the larger Ayurvedic medicine suppliers provide materials other than Ayurvedic internal medicines, particularly in the areas of foods and toiletries (soap, toothpaste, shampoo, etc.), where there may be some overlap with Ayurveda, such as having traditional herbal ingredients in the composition of toiletries. The key suppliers in Ayurveda are Dabur, Baidyanath, and Zandu, which together have about 85% of India's domestic market.

The first ever documented knowledge of human race is Vedas; it denotes the knowledge of life. Ayurveda is considered as the fifth Veda, the greatest contribution of vedic wisdom in health and medicine. It is a way of life, a philosophy, and a science of healing and health care. The content of the Ayurveda is so important to human being and nature; it has been placed in the same echelon of that of Vedas. Its contribution to the world is just priceless and remain to the service of people to any stretch of period. This Vedic science of life was considered as the traditional healing system of India earlier, but today it has spread far beyond its traditional base and is getting importance across the world. Considering its ability to understand life and capacity to harmonize with environment and nature, it becomes the medicine of the future. The tradition attributes the origin of the science of Ayurveda to Brahma, the creator and Dhanvanthari, the deity of medicine. There is no accurate reference in the history regarding the source of knowledge, or any precise record of date of origin. The condensed knowledge and wisdom of a group of holy saints over their
meditation revealed it as the measures for reliving the sufferings and allied health problems of mankind. This science of hale and sick developed as an observational science and digonized from the nature or prakrithi.

Ayurveda, the Indian system of medicine is almost as old as Indian civilization and reflects the rich heritage of Indian culture. From the beginning of civilized human beings in India, they tried to be healthy by managing as close as to the nature and environment with the help and support from the resources from the nature. The origin of drugs dates back to the beginning of history of mankind. Herbs have been an integral part of maintaining healthy life style and managed various disease and disorders from primitive days. The much quoted saying “Ayurveda invent and the modern science discovers” holds sensible even today, as most of the centuries old concepts and principles of Ayurveda are effectively practiced and validated scientifically. Now, Ayurveda classifies the origin of drugs as plants (all parts), animals and minerals. The Indian seers invented and documented the first therapeutic uses of the drugs based on the observations. Sus’ruta, Charaka and Nagarjuna are considered as the great seers who contributed texts or documents to this great science. Sus’rutasamhitaa, Charakasamhitaa, Asht’aagasangraha and Asht’aangahr’dayaa are renowned Ayurvedic treatises.

Ayurveda Medicines are based on the principle that every individual has a unique constitution that related to his vital energies translated into Ayurvedic Nosology as dosha. The equilibrium of these doshas depend on variety of factors the objective of Ayurveda is to re-establish the equilibrium when we are ill and to maintain that equilibrium in order to keep us healthy. Ayurveda explore how to heal our minds on all levels from subconscious to super conscious along with the role of diet, exercise and many other methods to create a perfect state of being.

Ayurveda mainly comprise of eight clinical specialties. They are General medicine (Kaya Ciktsaa), Pediatrics (BalaCikitsaa), Psychiatry (BhootaVidyaa), Treatment of Head and neck (S’alakyaTantra), Surgery (S’alyaTantra), Toxicology (AgadaTantra), Rejuvenation therapy (RasayanaTantra) and reproductive Medicine (Vajeekaranacikitsaa).
Sus’ruta, the author of Sus,rutasamhitaa, is hailed as the father of plastic surgery. His compendium stresses the need of keenness and observation to carry out various procedures on human body. Books like Cakradatta, Yoga Ratnaakara and BhaishajiaRatnavali are mainly books dealing exclusively with therapeutics. All these books are written in Sanskrit and various commentaries and translation of these books are available today. There is a array of books and paper presentation in different vernacular languages also.

According to Exim bank report, the world herbal products market is worth $80 billion. The annual growth rate is at 7%. It is expected that the market will reach $ 6 trillion by 2050. Indian herbal market is at Rs.4205 Crores. The export of ayurvedic and allied herbal products are at Rs.440 Crores. By 2020, it will have the potential to export worth Rs.7000 Crores.

According to Drug manufacturer’s Association, in Kerala alone there are 1400 small, medium and large companies. The total turnover is about Rs.400 Crores and export is less than Rs.60 Crores. Some of the major players in Ayurveda industry in Kerala are:

- Arya Vaidya Sala, Kottakal
- Arya Vaidya Pharmacy, Coimbatore
- Vaidyaratnam Oushadasala, Ollur
- Oushadhi, Thrissur
- S.D Pharmacy, Alle.ey
- Kandamkulathy Vaidyashala, Thrissur
- Kerala Ayurveda Pharmacy, Aluva
- Nagarjuna Herbal Concentrates.

This part of the country, Kerala has modulated and prepared many special treatments to suit the needs of patients and to cure diseases. India, the land of, strictly adopts a scientific academic method to teach Ayurveda. The Central Council of Indian Medicine, constituted by the government of India, monitors the quality and standard of Ayurveda education and practice. Samhita Ayurveda or Ayurvedic medicine is an ancient Hindu system of health care that is native to the Indian subcontinent. Today it is also used by millions of people all over the world. Ayurveda is also
gained popularity in the west. Ayurveda is concerned with measures to protect “ayus”, which includes healthy living along with therapeutic measures that relate to physical, mental, social and spiritual harmony. Ayurveda is also one among the few traditional system of medicine to contain a sophisticated system of surgery. Now Ayurvedic medicine and Ayurvedic products are exported to all over the world and the leading Ayurvedic product exporter is China form India Kerala has got a prominent position too.

Industrialization, Urbanization and Modernization forced the change in life style of people across the world gifted with many comforts and luxury along with many diseases and occupational health hazards which are innate with the working condition and urban life style caused due to stress, strain and food habits. But this health science has got many ways to overcome these ailments by living in the prescribed way of life through Ayurveda. Generally it is believed that hospitals are not good for prevention of diseases or creating health, but they are for curing the diseases already affected the human being. Ayurveda hospitals are exceptions, why because they have got rejuvenating treatment or a system prevalent for the prevention of diseases. Also it has capabilities to control and prevent many incurable ailments affected by human being and no other system could effectively treat it. World Health Organization now recommends people across the globe to access for alternative medicines. Hence Ayurveda is to be considered as the best and people friendly alternative medicine in an affordable price without much side effect/ reaction for the medicine and treatment. The importance of this system of medicine and treatment is spreading across countries. One of the specialized areas in Ayurveda treatment is Panchakarma, it is a highly prominent style of treatment by way of purify the body and regaining the Normal health through medicine and massage. It is popular because it can cure or provide relief to many incurable and neurological diseases.

Other than India many Asian countries like China, Srilanka, Malaysia, Pakistan are also effectively in popularizing Ayurveda and involved in this business in a very big way. India also focusing more on Ayurveda Industry by providing support and making it’s availability more. In domestic sector as well as in international market India expanding its vibrant presence. Business turnover of Ayurveda industry is going high. Government declared many facilities and measures to increase and develop
Ayurveda Industry. They also made clear guidelines to upkeep the slandered and quality of products and service. The quality of product is a deciding factor for export as well as for domestic business. One of the threats in this area is the availability of genuine as well as sufficient quantity of raw materials. For motivating the cultivation of medicinal plant government is providing many facilities to farmers. Drug control department is on the job to bring specific standards for its medicines to uplift the quality of Ayurveda Medicines.

3.2 AYURVEDA – IT’S CLASSICAL STATUS IN THE WORLD OF HEALTH CARE

Ayurveda, India’s natural health care tradition has a unique way of classifying human population based on individual constitution or prakriti. Ayurveda is the oldest system of medicine in the world and by far the most commonly practiced form of Non-allopathic medicine in India, particularly in rural India, where 70% of the population lives. It is also widely practiced in countries in Southeast Asia including Bangladesh, Sri Lanka, Nepal, and Pakistan. Ayurveda medicine dates back to 1500–2000 BC and the first written reports can be traced to 600 BC. (Singh, 1999). The knowledge of Ayurveda was passed orally through a lineage of sages in India until it was collated into text more than five thousand years ago. It promotes the usage of the special diet, herbal compound and other unique healthy practices. Ayurvedic products are regulated as dietary supplements. As such, they are not required to meet the same safety and effectiveness standards as conventional medicines. The research on Ayurvedic medicine is supported by the Indian government and other institutes throughout the world.

India has a very long, safe and continuous usage of many herbal drugs in the officially recognized alternative systems of health viz. Ayurveda, Yoga, Unani, Siddha, Homeopathy and Naturopathy. These systems have rightfully existed side-by-side with Allopathy and are not in ‘the domain of obscurity (Subramanian, 2003). Globally there are certain disease which is increasing to epidemic proportions are Obesity, metabolic syndrome, and diabetes mellitus. In ancient Ayurvedic texts a Prameha syndrome was described that includes clinical conditions involved in obesity, prediabetes, diabetes mellitus, and metabolic syndrome. The growing interest in alternative and complementary therapies and increased demand of herbal
drugs, it would be of mutual benefit, if India and China share strengths and weed out the weaknesses. Such efforts would lead to science-driven promotion of these practices for newer therapies and medicines for emerging global markets.” Both Ayurveda and TCM (Traditional Chinese Medicine) aim to enhance the quality of life.

3.3 AYURVEDA INDUSTRY: A GENERAL ANALYSIS OF THE INDUSTRY AND IT’S GLOBAL, INDIAN AND KERALA PERSPECTIVE

A change in Indian economic policies in the form of liberalization benefited urban professionals such as professors, physicians, lawyers, business executives and higher government employees. Together with urban business people these groups formed an affluent consumer class that could afford to pay much more for Ayurvedic and Unani medicines than they could 10 years before. The industry is expanding fast and four years later the turnover of the Ayurvedic industry was about US $1000 million. This is significantly high when compared to a turnover of US $6 million in 1980 (Leslie 1989). This created a market for Ayurvedic and Unani branded products, which are approximately five times as expensive as similar traditional medicines (Bode 2004). Ayurvedic and Unani products are marketed as natural remedies against common discomforts such as indigestion, cough, muscle pain, headache, pimples and rashes, menstrual irregularities, whitish discharge, post-partum and menopausal ailments. Increasingly, Ayurvedic and Unani medicines have been propagated as remedies against ‘modern’ chronic diseases like diabetes, arthritis, Alzheimer’s and Parkinson’s disease. The way the market shapes, constrains and transforms Ayurveda and Unani, India’s largest medical traditions.

In India, the Department of AYUSH, Government of India, launched a Central Scheme to develop a standard operating procedure for the manufacturing process to develop pharmacopoeia standards for Ayurvedic preparations. Pharmacopoeia of folk medicine, as well as organized TM systems such as Ayurvedic and Chinese medicine, contains hundreds of thousands of plants, animal, mineral and other substances (Alves & Rosa, 2007). The quality assessment of herbal formulations is of paramount importance in order to justify their acceptability in modern systems of medicine (Kalaiselvan et al., 2010). One of the major problems faced by the herbal
drug industry is the unavailability of rigid quality control profiles for herbal materials and their formulations. Regulatory bodies have laid down the standardization procedures and specifications for Ayurvedic preparations.

According to Aryavaidyaaala, development of Ayurveda in Kerala is particularly noted for its origins in Non-Brahminical traditions even before the entry of classical Ayurveda in the early centuries of the Christian era. These two streams subsequently blended so well that it gave a unique strength to the health care tradition of Kerala. Selected few Brahmin households, named generally as Ashtavaidyas, were bestowed with the responsibility of maintaining the Ayurvedic tradition by practicing it as a health care service as well as by teaching its principles in the unique Gurukula tradition. Another very important contribution by Kerala physicians is the continued practice and enrichment of the Panchakarma therapy. Even when they became defunct in the rest of the country due to socio-political reasons, Kerala retained this therapeutic wealth in all its pristine essence. Texts were written here on its practical aspects. More importantly, the famous Kerala special therapies were evolved by the practitioners here. They are essentially preparatory in nature. There are several unique herbal formulations described in Kerala texts. Many of them have now received national level acclaim and they are included in the Ayurvedic Formulary of India. One important aspect of Kerala formulations is that the stress is more on herbal components rather than on metals or minerals.

As Ayurveda has grown to be recognized worldwide, Now Ayurveda tourism has actually developed in Kerala. In their study Ramesh and Kurian Joseph (2012), they have identified that the tourism potential of Kerala has shown manifold increase through Ayurveda wellness clinics and spas. They have mentioned the following as the top priority areas:

- Credentials – recognized international accreditations & certifications.
- Experience – board certified doctors, training, years of experience.
- Patient References – patient testimonials, before & after pictures.
- Specific Treatment Methods – uniqueness of center & procedures offered.
- Comprehensive Solution – provide complete solution to a treatment.
- Reputation – locally as well as internationally e.g., publications, research papers.
- Language – effectively communicate in patient’s preferred language.
- Geographic Location – local conveniences, transportation services, attraction
- Cost and
- Benchmark data

It can be seen that the above justifies the need for Ayurvedic formulations and drugs and hence we have about 1400 Ayurveda medicines manufacturers in Kerala.

KSIDC quoted that with the increasing acceptance of alternative medicine globally, the scope of Ayurveda increased. Ayurveda is also successful in the treatment and management of lifestyle and chronic diseases. Growth of Ayurveda would mean the use of indigenous knowledge systems for creation of jobs and wealth. It has significant multiplier effects in the area of tourism, agriculture, manufacturing and education.

Harilal (2009) quoted that Today, almost all leading Ayurvedic firms have their outlets throughout Kerala, but each firm has created its brand loyalty and niche market in particular regions within Kerala: AVS in North Kerala (Malappuram, Kasargode, Palakkad); Sitaram, Arya Vaidya Pharmacy and Vaidya Ratnam in Thrissur-Ernakulam belt; and Nagarjuna herbal concentrates in south Kerala (Ernakulam and southward), SD Pharmacy, Oushadhi and Pankajakasthuri cater to all regions of Kerala. Though concentrated in structure, it is important to Note that in Kerala, medicinal production constitutes bulk of the Ayurvedic manufacturing sector unlike other states, where nutraceuticals and cosmetics have the dominance.

According to him, the Ayurvedic manufacturers in Kerala could be broadly categorized under the following three types:

(a) Household level, small manufacturing centres run largely by Vaidyas to serve the village needs. These are largely self-regulated entities, growing on the basis of the track record and credibility.

(b) Large-scale units solely manufacturing Ayurvedic medicines as per the texts. Many a times, these companies draw upon traditional knowledge and selectively adopt modern technology to attain growth.

(c) Firms, which mainly concentrate on the nutraceuticals and cosmetics along with medicines. However, they face regulatory problems.
He has concluded that in Ayurvedic manufacturing has better prospects with the present growth provided that, there are higher incentives for R&D, sustainable use of raw material, further linkage with medicinal plant cooperatives and successful cluster promotion. A major concern is the change in product pattern and importance given by most of the firms towards nutraceuticals and cosmetics, and the failure of regulation systems, which may hamper the spread of Ayurvedic therapeutic tradition and its clinical value in future. Conscious efforts are, therefore, required to promote the therapeutic aspects of Ayurveda as a system, so that it can emerge as a distinct contender in the pluralistic healthcare market, rather than a supplier of some “safe” herbal remedies for the international market for complementary and alternative medicines.