

International Arogya 2007

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*Strengths and Achievements
of India
for Ayurveda
in Germany and Europe*

Items

- ⊕ German Health Market and its Diversification
- ⊕ Market Sectors of Ayurveda in Germany & Europe
- ⊕ Actual Situation of Ayurveda in Germany
- ⊕ Proposals for Promotion Topics & Strategies

German Health Market Potential

Total Expense 2005* in Billions Euro 239.4 / Rs.13,406.4

Among these spent in

- Doctor Studios Euro 57.4 / Rs.3,214.4
- Pharmacies Euro 34.8 / Rs. 1,948.8
- Hospitals Euro 62.1 / Rs. 3,477.6
- + Prevention / Rehabilitation Euro 7.2 / Rs. 403,2
- Research Euro 2.7 / Rs. 151,2

Contribution of Health Insurances

- Private: Euro 22 / Rs. 1,232
- Public: Euro 135,9 / Rs. 7,610.4

⊕ Destatis (Federal Authority of Germany for Statistics)

Diversified German Health Market Potential

OTC Products

Billions Euro 4¹ / RS. 224

84% distributed by pharmacies

Clients Profiles²

36 % **exclusivly** buy in Pharmacies

40% buy in Drug Stores, Health Food Shops, Supermarkets or Discounters
+ 24% are open minded towards OTC products not distributed by pharmacies

36% regularly use Food Supplements

Without advise from Doctor, Phamacist or Nutrition Expert

45% refuse Food Supplements

¹Corfina AG, 2006 ²Health Care Monitoring 2006

Health Awareness in Germany Market & Clients Profile

Market Volume : Request = Billions 60 : 76¹

- ⊕ Annual Plus for Prevention, Alternative Medicine, Wellness, Sport, Healthy Food: 6 %

Growth per Year:

- ⊕ 10% Private Expense for Health Prevention
- ⊕ 8% Healthy Food
- ⊕ 8% Health Tourism (until 2010)

¹Roland Berger Consultants, published 07/07

Eco-Affinity

Germany is the largest market in Europe for organic and ecological products

Reasons: Request for healthy food and Wellness

Investigation from German Wellness Association in 2007

Requests towards GWA

- ⊕ Quality control / safety (58%)
- ⊕ Independent Information Center (51%)
- ⊕ Protection of Consumers (30%)
- ⊕ Engagement in Health Projects (21%)

Largest Chances of Market Increasing

- ⊕ Medical Wellness
- ⊕ Quality control / safety
- ⊕ Prevention by Wellness
- ⊕ Nutrition

Web-Contacts looking for „Ayurveda in ...“

⊕ > 1.000.000

USA (2.330.000), India (2.180.000)

UK (1.340.000) , Germany (1.160.000)

⊕ > 500.000

France (990.000), Austria (851.000), Switzerland (723.000)

⊕ < 500.000

Italy (451.000), Portugal (439.000), Great Britain (274.000),
Hungary (148.000), Russia (97.800), Spain (70.400)

How do German Clients know of Ayurveda today?

- Via Hotels & Travel Agencies
- Via Media
 - Newspapers, Magazines, Special Interest Publications, TV & Radio Broadcast Advertisement
- Via Internet
- Via Friends, who got in touch with Ayurveda

Market sectors of Ayurveda in Germany & Europe

Wellness

Medical Wellness / Prevention

Therapy

Medicine

Diversified Market Sectors of Ayurveda in Europe & Germany

Wellness	Products + Care & Services + Training + Information
Medical Wellness / Prevention	Products + Care & Services + Training (Practitioners) + Information
Therapy	Products + Care & Services + Training Practitioners + Information
Medicine	Medicines + Doctor Studios / Clinics + Care & Services + Medical Training Doctors & Practitioners + Information

Client Groups of Ayurveda in Germany

For Products and Care & Services

- ⊕ Distributors (Hotels, Pharmacies, Internet, Travelagencies, ...)
- ⊕ Patients
- ⊕ Individuals

For Trainings

- ⊕ Wellness & Beauty Consultants, Nutrition Consultants, Therapists, Practitioners, Doctors, Pharmacists, Travel Agents

For Information about Ayurveda

- ⊕ Distributers of Information (Media, Radio, TV, Internet)
- ⊕ Individuals (Patients, Consumers)
- ⊕ Wellness & Health Professionals (Travel Agencies, Hotels, Clinics, Doctors, Therapists)
- ⊕ Wellness & Health Companies & Entities
- ⊕ Societies / Associations
- ⊕ Politicians

Actual Situation of Ayurveda in Germany

a) Products:

- ⊕ Missing legalization of Ayurveda medical products (EU Directive and German law about medical products)
- ⊕ Missing quality standards, known and recognized by German consumers
- ⊕ Missing trust of German consumers into Indian Ayurveda products distributed without recognition by a known German distributor

b) Care & Services:

- Widely offered in hotels as wellness, mostly missing trained staff and application of authentic Ayurveda products
- Widely superficial understanding of wellness among German consumers
„I pay and order“ or „I buy wellness“
Hardly requested as medical treatments
- Existing few hotels offering authentic Ayurveda in Germany
- Less offers of Ayurveda medicine

c) Ayurveda Medicine:

- ⊕ Missing knowledge among German consumers about Ayurveda as a system of holistic medicine
- ⊕ Very few Ayurveda clinics in Germany
- ⊕ Ayurveda medical products available only for doctors or declared as food supplements or cosmetics
- ⊕ Only two Ayurveda doctor trainings recognized by German doctor chambers
- ⊕ Only few Ayurveda doctors, mostly trained by short termed seminars
- ⊕ Only few research projects about Ayurveda medicines by German doctors or pharmaceutical scientists
- ⊕ Missing clinical studies about Ayurveda medicines, treatments and results recognized by German health entities

d) Information about Ayurveda

Asking „What is Ayurveda?“

Answers

- ⊕ Aloe Vera
- ⊕ Wellness
- ⊕ Massage
- ⊕ Much Oil
- ⊕ Expensive
- ⊕ Comes from India
- ⊕ Heavy Metals and Toxins in Products and Pills

What does all this show to us?

What is the meaning of this?

There is hardly any knowledge existing in Germany (like in most parts of Europe) about what is Ayurveda really !

Among „informed“ people, the image of Ayurveda is not positive!

Producers of Ayurvedic products want to serve a market, which they themselves do not know. There are many marketing studies about health and wellness markets, but not a single one about Ayurveda.

Why people shall request a medical service, they even do not know, that it exists and what it is?

Why European politicians should engage themselves for something, their peoples do not know and do not request as medicine?

How to promote Ayurveda in Germany? or Strenght and Achievements of India for Ayurveda in Germany and Europe

Support to Concept for Strategies and
Realization of

1. Correct Information
2. Quality Standards
3. Public Affairs

for Ayurveda in Germany and Europe.

1. Information about Ayurveda

- a) Achievement of an European Media Service, serving Media with journalism, independent from, partial interests, becoming their Point of Reference
- b) Structured and well investigated information
- c) Facts about

What is Ayurveda

Ayurveda market sectors

Complementary Ayurveda therapies

Ayurveda as alternative medicine system

Research in western & countries of origin

Politics WHO and EU

- d) Advertisement
- e) Public events and conferences (European Arogya)

2. Quality standards for Ayurveda in Germany and Europe

Definition of criterias for quality standards in

- a) education & teaching
- b) products
- c) care & services
- d) therapy
- e) medicine

recognized on EU level and accepted by Germans and
Europeans.

3. Public Affairs for Ayurveda

- ⊕ Creation of an Ayurveda Head Quarter or Roof NGO in Europe with seat in Brussels
- ⊕ Lobbying
- ⊕ Regular exchange between GOs and NGOs in the medical, teaching & product sector
- ⊕ Conferences with doctors & scientist from Indian **and** European Universities and Hospitals
- ⊕ European AROGYA in Brussels

First Steps towards Realization

- ⊕ Forming an International Commission for Quality Standards of Ayurveda
- ⊕ Engaging an „Ambassador“ for Ayurveda in Europe
- ⊕ Engaging an Agency for Public Affairs (Lobbying)
- ⊕ Realizing an European Ayurveda Media Service
- ⊕ Ordering a representative Marketing Study

Thank you for your attention

Arogya 2007, Delhi Iris Hüttner