KNOWLEDGE PAPER · 2026

Towards a Healthier India

Building a Culture of Preventive & Holistic Wellness

ON THE FUTURE OF HEALTH & WELLNESS IN INDIA

“

The choice before the nation is not whether to build a culture of preventive and holistic wellness, but *how quickly and how inclusively* to do so.

— TOWARDS A HEALTHIER INDIA · KNOWLEDGE PAPER, 2026

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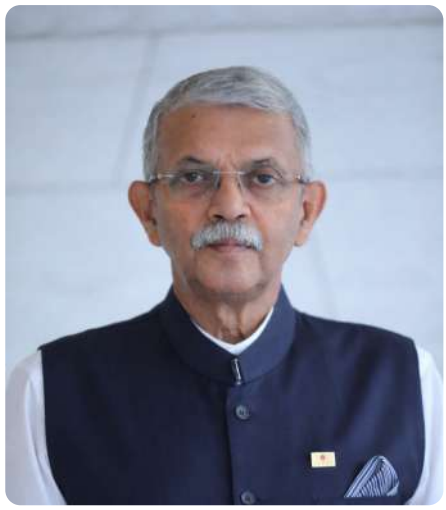
MESSAGE

Health is the foundation on which every other national ambition rests. A nation can build world-class infrastructure, industry and technology, but none of it endures without a healthy, productive population behind it. As India moves towards Viksit Bharat@2047, health and wellness deserve to sit at the very centre of that journey, not as a welfare afterthought, but as the bedrock of our human capital and our economic strength.



Mr. Saurabh Sanyal
Secretary General, ASSOCHAM

Health today encompasses a broad continuum of care and wellbeing, from robust healthcare infrastructure, quality clinical services and advanced medical technologies to preventive care, nutrition, fitness, mental wellbeing and healthy ageing. At the centre of this transformation is the need for a patient-centric, accessible and technology-enabled healthcare system. Modern hospital infrastructure, integrated care models and emerging technologies are creating new opportunities to improve patient experience, outcomes and the delivery of quality care.

India is uniquely positioned to combine the strengths of modern medicine, science and technology with its rich heritage of traditional knowledge. Ayurveda, Yoga, naturopathy and holistic approaches to nutrition and mindful living offer valuable perspectives on wellbeing, while advances in artificial intelligence, digital health, diagnostics, robotics, wearables and data-driven healthcare are transforming care delivery. Integrating these strengths, supported by evidence, quality standards and innovation, can help India shape a more holistic and globally relevant health and wellness landscape.

Around this foundation, a dynamic health and wellness ecosystem is evolving, bringing together hospitals, healthcare providers, medical technology, digital health, nutrition and wellness. Advances in healthcare technology and infrastructure are enabling more personalised, efficient and patient-centric care, with a growing emphasis on quality, safety and accessibility.

The Health and Wellness Summit 2026 aims to provide a platform to exchange perspectives and advance dialogue on the future of healthcare and wellness, spanning patient-centric hospitals, digital healthcare, preventive wellness, traditional medicine and workplace wellbeing. Through stronger industry-government collaboration, innovation and enabling policies, it seeks to support a more accessible, affordable, inclusive and resilient health and wellness sector in India.

At ASSOCHAM, we remain committed to fostering constructive engagement among industry, government, research institutions, academia, and other stakeholders to championing policy interventions that advance access, affordability and innovation across the health and wellness value chain.

I congratulate and thank our knowledge partner “TechSci Research”, the industry leaders, policymakers, researchers, scientists, and all contributors associated with this important initiative. I am hopeful that this Summit will provide valuable insights and contribute meaningfully to building a healthier and more resilient India in the years ahead.

Mr. Saurabh Sanyal

SECRETARY GENERAL, ASSOCHAM

India stands at a defining moment in its health journey. For decades, our national conversation on health began at the hospital door; today, it begins in our homes, our kitchens, our workplaces and on our smartphones. Prevention is no longer an abstract idea; it is becoming a way of life, and the organisations that enable it will shape the next decade of Indian healthcare.

Karan Chechi
CEO & Founder, TechSci Research

At TechSci Research, we believe this transformation will be led by people and institutions: employers who treat the health of their teams as a strategic asset, innovators who make wellbeing affordable, and governments that place the citizen at the centre of care. Our role is to bring clarity to this shift, so that decisions taken in boardrooms and policy corridors rest on sound evidence.

Preventive and holistic wellness must not remain a privilege of the few. Affordable diagnostics, vernacular digital platforms, workplace programmes and our own traditional systems, from Ayurveda to yoga, give India a rare opportunity to make wellbeing inclusive by design. The convergence of modern medicine, technology and traditional wisdom is not a distant vision; it is the market of today, and it is expanding faster than almost any other sector of our economy.

I congratulate ASSOCHAM for convening the industry around this agenda at the 4th Health and Wellness Summit 2026. I thank every policymaker, industry leader, researcher and innovator contributing to this dialogue, and I invite each stakeholder to adopt one concrete commitment to prevention in the year ahead.

A healthier India will be built one habit, one policy and one partnership at a time, and it begins with each of us.

Karan Chechi

CEO & FOUNDER, TECHSCI RESEARCH

CHAPTER 01

Executive Summary

The case for prevention, in one reading.

India is at a historic inflection point. For decades, the country's health system has been organised around treating disease, hospitals, doctors, medicines and insurance that activate after something goes wrong. That model is no longer sufficient, nor affordable. Non-communicable diseases (NCDs) now account for nearly half of all deaths in India, and a large share of that burden is premature and preventable. At the same time, a new wellness economy is growing at double-digit rates, propelled by rising incomes, urbanisation, digital adoption and a generation that treats health as an investment rather than an afterthought.

The market evidence assembled by TechSci Research is consistent across segments. India's ayurvedic products market was valued at **USD 8.12 billion in 2024** and is expected to reach **USD 22.37 billion by 2030**, growing at an **18.4% CAGR**, the fastest-expanding traditional wellness segment in the country. The nutraceuticals market stood at **USD 6,135.15 million in 2025** and is projected to reach **USD 11,769.91 million by 2031** at an **11.47% CAGR**. Telemedicine exceeded USD 1.54 billion in 2024 and is compounding at 20.75%, while e-pharmacy is projected to grow from USD 394.09 million in 2024 to USD 801.34 million by 2030 at a 12.62% CAGR. Read together, these numbers carry a clear message: Indian consumers are already spending on staying well, and the markets that serve them are compounding at rates most industries would envy.

Key findings

18.4%
CAGR of India's ayurvedic products market (2024 to 2030), the fastest-growing traditional wellness segment
TECHSCI RESEARCH

11.47%
CAGR of India's nutraceuticals market, from USD 6.1 bn (2025) to USD 11.8 bn (2031)
TECHSCI RESEARCH

20.75%
Projected CAGR of India's telemedicine market over 2026 to 2030
TECHSCI RESEARCH

15.91%
CAGR of the global fitness app market, wellness is going digital and on-demand
TECHSCI RESEARCH

15.55%
CAGR of the global mental health apps market
TECHSCI RESEARCH

49.1%
Share of deaths in India attributable to non-communicable diseases, the burden prevention must bend
WHO

Five shifts reshaping the ecosystem

- **From cure to prevention.** Consumers and policymakers alike are moving from "fix me when I am sick" to "keep me well". Screening, vaccination, nutrition and lifestyle management are becoming first-line strategies.
- **From generic to personalised.** One-size-fits-all advice is giving way to personalised nutrition, fitness and care plans built on biomarkers, genetics and wearable data.
- **From clinical to consumer.** Wellness is increasingly bought and sold like any consumer good, on apps, in retail, at the workplace, rather than dispensed only in clinics.

- **From individual to ecosystem.** Health outcomes are shaped by employers, schools, cities and platforms, not just by individuals acting alone.
- **From urban elite to mass market.** Digital distribution and affordable formats are carrying wellness beyond the metros into tier 2/3 cities and, increasingly, rural India.

Critical opportunities

- **Preventive diagnostics and screening at scale**, early detection of diabetes, hypertension and cancer risk, delivered through public programmes and private platforms.
- **Corporate and workplace wellness**, employers as the single most powerful channel for changing adult behaviour at scale.
- **The silver economy**, healthy ageing, longevity services and senior care for a population that is living longer.
- **Women's health**, a structurally underserved segment with fast-growing demand and a clear business case.
- **Digital therapeutics and artificial intelligence**, software that coaches, monitors and treats.
- **Wellness tourism and traditional medicine**, India's Ayurveda and yoga heritage as a global export.

Strategic priorities

WHAT LEADERS SHOULD DO NOW

1. **Make prevention a national habit.** Sustained public campaigns, school curricula and urban design that normalise movement and nutrition.
2. **Build the data backbone.** Accelerate the Ayushman Bharat Digital Mission so every citizen owns an interoperable health record.
3. **Incentivise wellness.** Insurance premium discounts, tax incentives and employer programmes that reward prevention, not just treatment.
4. **Scale health literacy.** Meet people in the languages and channels they trust, from vernacular apps to community health workers.
5. **Raise quality standards.** Certification for nutraceuticals, wellness services and digital health products to protect consumers and build trust.
6. **Measure outcomes.** Track wellness indicators as rigorously as disease indicators, so policy and capital follow evidence.

CHAPTER 02

India's Evolving Health & Wellness Landscape

How a treatment-first nation is learning to think in prevention.

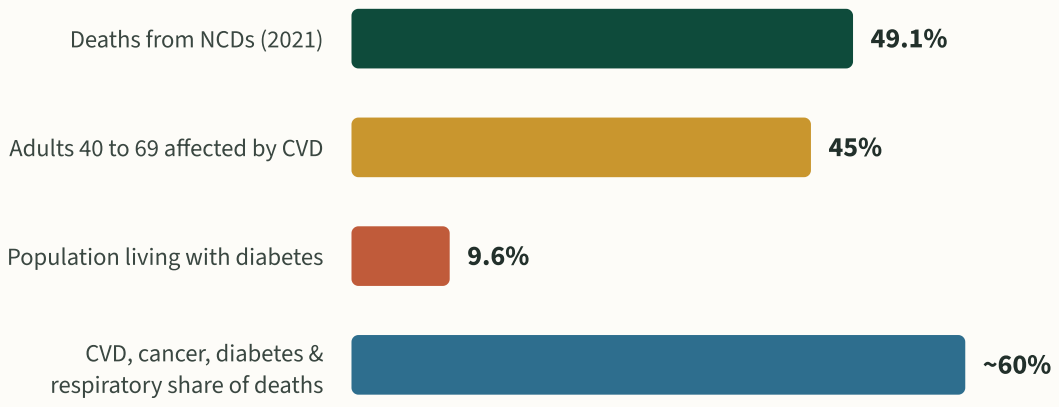
India's healthcare architecture, built around hospitals, physicians and pharmaceuticals, is world-class at episodic intervention but has been oriented towards the end of the disease journey. The past decade has begun to change that orientation, and the pace of change is accelerating. To understand where the wellness economy is going, it helps to measure both the burden it addresses and the consumer shift that is already underway.

2.1 The burden of disease: why prevention is the only rational strategy

India carries one of the world's heaviest loads of non-communicable disease. According to the World Health Organization, **49.1% of deaths in India were attributable to NCDs in 2021**. The ICMR-INDIAB study, which screened more than 113,000 individuals across 30 states and Union Territories, found that **9.6% of the population lives with diabetes**, while cardiovascular disease affects roughly **45% of people aged 40 to 69**. Behind these headline numbers sit hypertension, obesity, chronic respiratory disease and mental-health conditions, all of them largely preventable or manageable with early, sustained intervention.

The preventable burden India must bend

Share of deaths from NCDs and prevalence of key lifestyle risk conditions



Sources: WHO (2021); ICMR-INDIAB study. The ~60% line reflects the combined share of the four leading NCD groups in India's mortality profile.

The economic corollary is stark. NCDs strike during the most productive decades of life, eroding workforce participation, household incomes and public finances. The National Programme for Prevention and Control of NCDs (NP-NCD) reports **74.97 crore beneficiaries enrolled** and **8.64 crore patients under treatment** for hypertension and diabetes. During the Ayushman Bhav campaign, **34.39 crore people were screened** for seven diseases and more than 16.96 lakh wellness, yoga and meditation sessions were conducted. India is, in effect, already running the world's largest screening programme; the open question is how to convert that screening into sustained behaviour change.

2.2 From cure to care to prevention: a paradigm shift

Health systems evolve in three horizons. The first horizon is curative, treat the sick. The second is managed care, coordinate treatment for chronic disease and reduce complications. The third horizon, which India is now entering, is preventive and holistic wellness: intervene upstream so that disease does not occur in the first place, and optimise health rather than merely manage illness. This is not a rejection of the first two horizons; it is their complement. Every rupee spent on prevention is a rupee that does not have to be spent on hospitalisation, and a life that does not have to be interrupted.

HORIZON 1

Curative

Treat the sick. Hospitals, doctors, medicines.

20th century

HORIZON 2

Managed care

Coordinate chronic care, reduce complications.

2000s to 2020s

HORIZON 3

Preventive wellness

Intervene upstream, optimise health, stay ahead of illness.

2020s onward

Source: TechSci Research synthesis. Each horizon builds on the last; the wellness economy is the commercial expression of Horizon 3.

2.3 Changing consumer priorities

The pandemic permanently reset how Indians think about health. What was once a private, clinical matter has become a public, lifestyle conversation: consumers now speak fluently about immunity, gut health, protein intake, sleep scores and stress management. Wellness has moved from the margins of the shopping basket to its centre, and households that once spent on treatment now spend on prevention, on better food, supplements, gyms, yoga, therapy and health tracking.

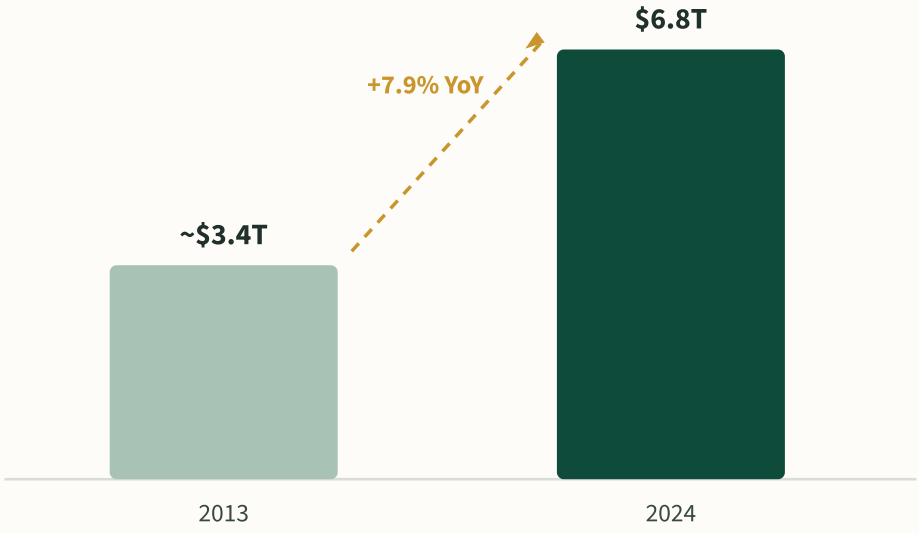
The shift is visible in the structure of TechSci Research's India Nutraceuticals Market data. Dietary supplements hold the largest category share at roughly **43%**; plant-based products account for about **62%** of the market; urban consumers drive around **72%** of demand; and North India is the largest regional market at approximately **34%**. These are the fingerprints of a consumer base that has made prevention a habit, and that increasingly wants its prevention in natural, plant-based, convenient forms.

2.4 The wellness economy: a global tailwind

India's shift is part of a worldwide phenomenon. The Global Wellness Institute estimates that the global wellness economy reached **USD 6.8 trillion in 2024**, growing more than 7% year on year and doubling in size since 2013. Wellness is one of the largest and most resilient sectors on the planet. India, with its demographic weight, its ancient wellness traditions and its fast-digitising population, is positioned to capture an outsized share of that growth, provided it builds the products, standards and distribution to match.

The wellness economy has doubled in a decade

Global wellness economy, USD trillion



Source: Global Wellness Institute, Statistics & Facts (2024). The 2013 figure is approximated from the Institute's statement that the economy "doubled in size since 2013".

2.5 The ecosystem stakeholders

No single actor can build a culture of wellness. India's evolving landscape is a web of interdependent players: **Government and regulators** (the Ministry of Health, the Ministry of AYUSH, FSSAI) who set standards and run public programmes; **healthcare providers** who are extending from treatment into screening and lifestyle medicine; **nutrition and FMCG companies** reformulating for health; **fitness and wellness operators** in gyms, yoga and sports; **technology companies and startups** in apps, wearables, telemedicine and e-pharmacy; **payers and insurers** who are beginning to reward prevention; and **consumers**, whose daily choices remain the real battleground of wellness.

2.6 Major trends shaping the sector

Six trends, in particular, are redefining the landscape:

- **Preventive and functional nutrition.** Food is being engineered to do more than feed; it is being asked to fortify immunity, metabolism and longevity.
- **The Ayurveda renaissance.** Traditional medicine is being modernised, standardised and globalised. TechSci Research's India Ayurvedic Products Market was valued at **USD 8.12 billion in 2024** and is expected to reach **USD 22.37 billion by 2030**, an **18.4% CAGR**, making it the fastest-growing segment of the wellness stack covered in this paper.
- **Digital-first wellness.** From fitness apps to teleconsultations, the smartphone is the front door of health for a billion people.
- **Personalisation.** Data-driven, individualised plans are replacing blanket advice.
- **Workplace wellness.** Employers are emerging as a primary channel for adult behaviour change.
- **Healthy ageing.** A society living longer is learning to live better, for longer.

CHAPTER 03

The New Dimensions of Health & Wellness

Wellness is no longer just the absence of disease, it is a full-spectrum way of living.

The word "wellness" once meant little more than "not being ill". That definition has been stood on its head. Wellness today is understood as a multi-dimensional, proactive pursuit, physical, nutritional, mental, restorative and preventive, woven into the texture of everyday life. For India, this redefinition is both a cultural homecoming and an economic opportunity: many of these dimensions are native to Indian traditions of yoga, Ayurveda and mindful living, now re-energised by modern science and digital delivery.

3.1 Redefining wellness: from absence of disease to optimisation of life

The modern wellness paradigm treats health as a spectrum rather than a binary. At one end is illness; in the middle, "normal" functioning; and at the far end, thriving, high energy, sharp cognition, emotional resilience, restful sleep and metabolic fitness. The wellness economy is built on the conviction that the middle ground is not enough, and that the distance from "normal" to "thriving" can be closed by daily choices and smart tools. Six dimensions carry that conviction: physical fitness, nutrition, mental well-being, sleep and recovery, preventive screening, and healthy ageing and longevity.

Source: TechSci Research synthesis. Each layer is a distinct market with its own trajectory, yet the six converge in the consumer's daily life.

3.2 Physical fitness: from gyms to everywhere

Physical activity is the cheapest, most universally available medicine India has, yet it remains the most under-prescribed. The fitness ecosystem is responding with a wider range of on-ramps: organised gyms and boutique studios, functional and strength training, running and cycling communities, sports leagues, and, increasingly, app-based and home workouts that remove the barriers of time, distance and cost.

Technology is the accelerant. TechSci Research projects the global fitness app market to grow from **USD 2.07 billion in 2025 to USD 5.02 billion by 2031**, a **15.91% CAGR**, one of the fastest-growing categories in the entire digital economy. In India, where smartphone penetration is deep and gym density is low, the app-first fitness model has particular resonance: it turns every living room into a studio and every phone into a personal trainer.

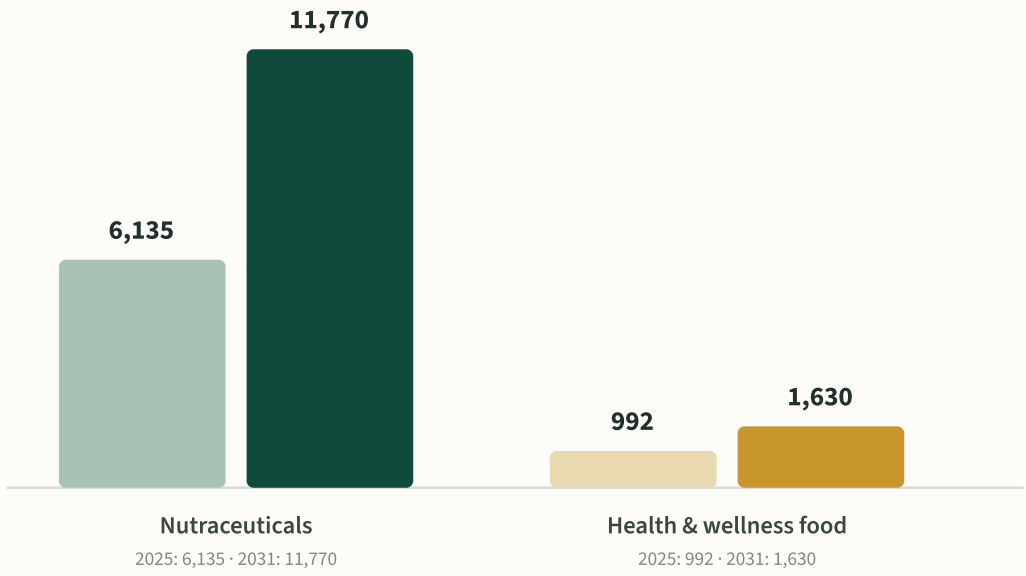
3.3 Nutrition: the new frontline of prevention

If movement is the first medicine, food is the second, and Indians are increasingly treating it that way. The nutrition market is bifurcating into everyday food that is being made healthier, and targeted nutrition that is being made everyday. TechSci Research projects the Health & Wellness Food Market to grow from **USD 992.19 million in 2025 to USD 1,629.51 million by 2031** at an **8.62% CAGR**, while the India Health Ingredients Market, the raw materials behind fortified and functional foods, was valued at **USD 3.58 billion in 2023** and is growing at a double-digit pace. Together they describe a supply chain re-orienting itself around health.

Food is the new frontline of prevention, functional, plant-based and fortified foods are the fastest-growing nutrition segments in India.

Projected growth of India's nutrition-led wellness segments

TechSci Research market forecasts, USD million at each horizon



Source: TechSci Research, India Nutraceuticals Market and Health & Wellness Food Market reports. Values in USD million.

The nutraceuticals segment deserves particular attention. At **USD 6,135.15 million in 2025**, growing at an **11.47% CAGR** to an estimated **USD 11,769.91 million by 2031**, it is the clearest expression of India's preventive-consumer behaviour. The category structure reinforces the story: dietary supplements account for roughly **43%** of the market, plant-based formulations for about **62%**, and the urban segment for around **72%** of demand, all pointing to a market that has moved beyond fads into routine consumption.

3.4 Mental well-being: from stigma to mainstream

Mental health has undergone the most dramatic cultural shift of any wellness dimension. What was once a private, stigmatised subject is now a mainstream product category and a workplace agenda. The drivers are real, urban stress, digital overload, workplace pressure and, among the young, an unprecedented willingness to talk about emotional health. The market is responding: TechSci Research projects the global mental health apps market to grow from **USD 6.78 billion in 2025 to USD 16.14 billion by 2031** at a **15.55% CAGR**. In India, where the ratio of mental-health professionals to population remains among the world's most stretched, digital delivery, apps, online therapy, employee assistance programmes, is not a convenience but a necessity.

3.5 Sleep: the overlooked pillar

Sleep is the dimension most people neglect and the one that underpins all others. Poor sleep is implicated in metabolic disease, impaired immunity, mood disorders and reduced productivity. The "sleep economy", trackers, apps, mattresses, supplements and clinics, is emerging as a serious category. TechSci Research projects the global sleep app market to grow from **USD 2.88 billion in 2025 to USD 4.26 billion by 2031** at a **6.74% CAGR**. For a nation of chronic under-sleepers, sleep hygiene is one of the highest-return, lowest-cost interventions available, and a natural fit for corporate wellness programmes.

3.6 Preventive healthcare: screening as a habit

Prevention in the clinical sense means catching problems before they become diseases: regular screening for diabetes, hypertension, cholesterol, cancer and mental-health risk; vaccination across the life course; and risk-based check-ups rather than one-size-fits-all annual panels. India's public machinery has built extraordinary reach, the **34.39 crore people screened** under Ayushman Bhav and the **74.97 crore enrolled** in the NP-NCD programme are world-scale numbers. The next step is converting episodic screening into continuous engagement: annual rhythms, personal risk scores and nudges that turn a check-up from an event into a habit.

3.7 The pillars of longevity and wellness

Longevity is not the mere postponement of death; it is the extension of healthy, capable life. Modern longevity science converges on a small number of pillars, and, significantly for India, each one has a native tradition that already teaches it:

- **Movement and strength.** Regular physical activity, including strength training that preserves muscle and bone into old age. India's gift to this pillar is yoga and surya namaskar, a complete movement practice that needs no equipment.
- **Nutrition and nourishment.** A plant-forward, nutrient-dense diet with adequate protein, mirrored in the sattvic tradition of Indian eating and now validated by nutrition science and the growth of functional foods.
- **Sleep and recovery.** Consistent, restorative sleep as the repair shift of the body, the value Ayurveda has always placed on nidra, now quantified by wearables and sleep apps.
- **Mind and emotional resilience.** Stress management, meditation and emotional regulation, pranayama and dhyana, which lower cardiovascular risk and improve cognitive health.
- **Purpose and community.** Social connection, engagement and a sense of purpose, which research consistently ties to slower biological ageing, the Indian ideals of sangha (community) and seva (service).
- **Preventive vigilance.** Regular screening, vaccination and biomarker tracking, so that risk is detected and managed decades before it becomes disease.

These six pillars are the operating system of the wellness stack described in this paper. Each is already being commercialised, fitness apps for movement, nutraceuticals and wellness foods for nutrition, sleep apps for recovery, mental-health apps and therapy for the mind, and preventive diagnostics for vigilance.

3.8 Wellness in practice: clinics, centres and destinations

The pillars come alive in institutions across India. Destination wellness retreats such as Ananda in the Himalayas (Uttarakhand) and Vana (Dehradun) pair Ayurveda, yoga and spa therapy with modern diagnostics and personal coaching in a residential setting. Atmantan Wellness Centre on the Mulshi lake near Pune applies a clinical, metrics-driven approach to weight, metabolic and stress management. Kerala's Kalari Kovilakom and Kairali Ayurvedic Health Resort practise classical Ayurveda in their traditional settings, while Soukya International Holistic Health Centre in Bengaluru integrates Ayurveda, yoga and naturopathy with Western diagnostic medicine under one roof.

Ayurveda is being modernised and institutionalised, from classical retreats to clinically validated products and preventive wings of corporate hospitals.

Naturopathy and nature cure are institutionalised in the public and philanthropic sectors, the National Institute of Naturopathy in Pune and the Jindal Naturecure Institute in Bengaluru run residential programmes for chronic lifestyle disease that are as much educational as clinical. At the other end of the spectrum, hospital-based preventive wings have become a growth line for corporate hospitals: Apollo's preventive health programmes (under its ProHealth brand) package annual screening, risk scoring and physician follow-up for individuals and employers, while digital platforms such as GOQii and Cult.fit deliver coaching, fitness and nutrition at subscription prices. What these centres share, across price points and traditions, is a commitment to care that begins before disease: the defining characteristic of the wellness economy TechSci Research measures.

CHAPTER 04

Technology & Personalisation: Transforming Health & Wellness

The smartphone is becoming the front door of India's health system.

Technology is collapsing the distance between intention and action: it reminds us to move, tells us how we slept, tracks what we ate, connects us to doctors and therapists, and increasingly predicts, before symptoms appear, that something needs attention. India's digital infrastructure, with roughly **1.09 billion internet subscribers** and one of the world's most advanced digital-payment rails, makes it a uniquely fertile ground for digital health.

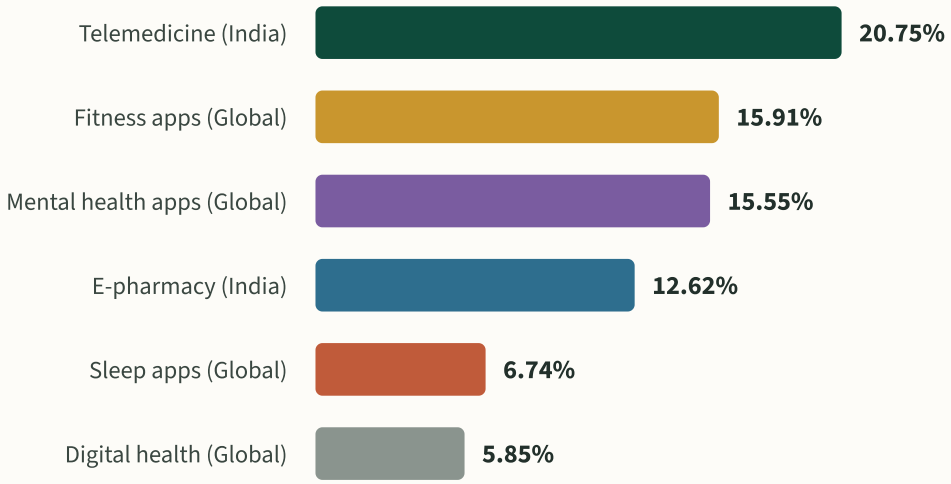
4.1 The digital health backbone

India has built the plumbing for digital health at national scale. The Ayushman Bharat Digital Mission (ABDM) is creating a federated network of digital health IDs, electronic health records and consent-based data sharing, the substrate on which every wellness application can eventually run. Telemedicine guidelines, e-pharmacy regulation and the rapid mainstreaming of online consultations have completed the enabling framework.

The market response has been emphatic. TechSci Research projects the global Digital Health Market to grow from **USD 200.82 billion in 2025 to USD 282.46 billion by 2031** at a **5.85% CAGR**, and India is among its fastest-growing theatres. The India telemedicine market stood at **USD 1.54 billion in 2024** and is expected to compound at **20.75%** through 2030, a reminder that in a country where physical access to specialists is uneven, the consultation of the future is a video call away.

Digital and remote wellness is compounding fastest

Projected CAGR across digital health and wellness segments



Source: TechSci Research market reports. Telemedicine figure for India; other categories global unless noted.

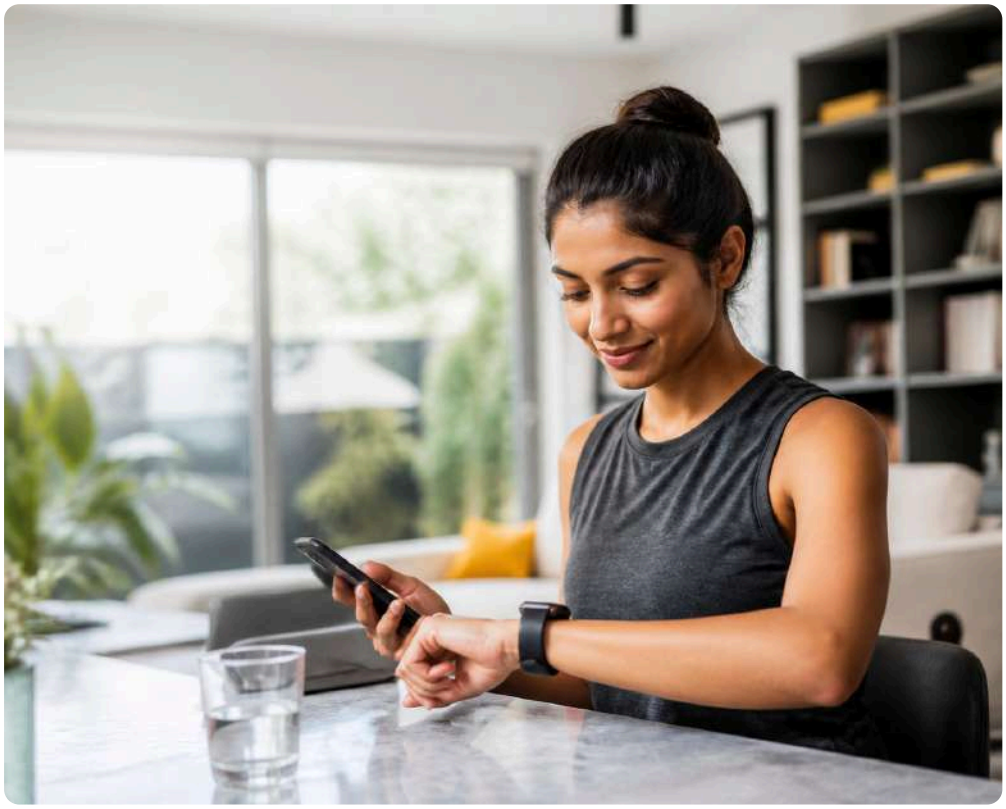
4.2 Artificial intelligence: the wellness co-pilot

Artificial intelligence is moving from research papers into everyday wellness. AI already powers conversational health assistants in vernacular languages, triage that routes a user to the right level of care, personalised coaching that adapts to

behaviour, and predictive models that flag diabetes or cardiac risk from routine data. For India, AI's greatest promise is scale with scarcity: it can extend the reach of a thin layer of specialists, translate health advice into every Indian language, and make personalised prevention affordable at population scale.

4.3 Wearables and remote monitoring

The wearable has become the wellness dashboard of the decade. Smartwatches and fitness bands track heart rate, sleep stages, activity, stress and, increasingly, blood oxygen and ECG signals. For chronic conditions, remote monitoring devices let clinicians watch a patient's vitals from afar and intervene before a crisis. For India the significance is profound: wearables convert the wellness stack into continuous, quantified feedback, and they create the data trail on which personalisation depends.



Wearables and health apps turn the smartphone into the front door of India's health system.

4.4 Health apps and platforms

Applications have become the connective tissue of wellness, fitness, nutrition, meditation, therapy, teleconsultation, pharmacy and records, often within a single super-app. The commercial logic is compounding: TechSci Research's projections for fitness apps (15.91% CAGR) and mental health apps (15.55% CAGR) show that engagement, not just access, is the growth engine. Platforms that keep users returning daily, through streaks, communities, rewards and measurable outcomes, are the ones building durable wellness businesses.

4.5 Personalised nutrition and fitness

Personalisation is the intellectual heart of the new wellness economy. Instead of generic advice, consumers increasingly receive plans calibrated to their bodies: DNA-based dietary guidance, gut-microbiome analysis, continuous-glucose-monitor-informed eating, and training programmes tuned to recovery data. India's nutraceutical market already shows the demand side, plant-based products at roughly **62%** share and an urban base at about **72%**, and personalisation is the next step, converting "what should I take?" into "what is right for me?".

4.6 Biomarkers and data-driven wellness

Underpinning personalisation is the biomarker revolution. Regular blood panels, hormonal profiles, metabolic markers and, increasingly, continuous sensors turn health from a subjective feeling into an objective dataset. The vision is a "quantified self" in which each citizen understands their own risk trajectory and acts on it. For India, the opportunity is to make biomarker-based preventive screening affordable and accessible, delivered through labs, pharmacies and community networks rather than reserved for the few.

4.7 E-pharmacy: wellness at the doorstep

Digital commerce completes the loop from insight to action. TechSci Research values India's e-pharmacy market at **USD 394.09 million in 2024**, projected to reach **USD 801.34 million by 2030** at a **12.62% CAGR**. E-pharmacies do more than sell medicines; they are becoming wellness retailers, delivering supplements, diagnostics, devices and consultations, and using data to recommend preventive care. They are also the channel that carries wellness beyond the metros into tier-2 and tier-3 cities and rural towns where physical retail is thin.

4.8 Data privacy and governance

The promise of data-driven wellness carries a corresponding obligation: trust. Health data is among the most sensitive personal information a citizen holds, and the wellness economy will stand or fall on its governance. India's Digital Personal Data Protection Act provides the legal framework, and the ABDM's consent-based architecture provides the operational model. Consumers will share their data only with platforms that demonstrably protect it, use it transparently and return value in the form of better health outcomes.

CHAPTER 05

Health & Wellness Across People, Workplaces & Life Stages

Wellness is personal, and it is delivered through the institutions people live, learn and work in.

A culture of wellness does not exist in the abstract; it is lived by specific people at specific stages of life, inside specific institutions. This chapter examines wellness through the lens of who it serves, women, youth, families, working adults and older Indians, and the settings where behaviour is actually formed: workplaces, schools and communities. It is here that the wellness economy becomes a wellness society.

5.1 Women's health: the most under-served, fastest-rising segment

Women's health has been, for decades, the most neglected dimension of Indian healthcare, under-researched, under-funded and under-discussed. That is changing, and the change is being driven by women themselves: greater financial independence, higher health awareness and a generation unwilling to accept that suffering is normal. Demand spans the entire life course, adolescent nutrition and menstrual health, reproductive and maternal care, hormonal and bone health in midlife, and cardiovascular and mental-health risk in later years.

TechSci Research projects the global Women's Health Market to grow from **USD 16.76 billion in 2025 to USD 25.49 billion by 2031** at a **7.24% CAGR**. In India the opportunity is amplified by a structural gap: women's health products, diagnostics and services remain disproportionately scarce relative to the population they serve. For employers, insurers and wellness platforms, women's health is both a social imperative and a strategic growth market, one that needs gender-disaggregated data, affordable diagnostics in the settings women trust, normalised conversations across generations, and products designed around women's actual life stages.

5.2 Youth and family wellness

Wellness habits are formed young and are deeply family-shaped. For children and adolescents, the priorities are nutrition, physical activity, sleep and, increasingly, digital wellbeing and mental health. Screen time, academic pressure and changing diets are creating new lifestyle risks, including early-onset obesity and diabetes. The family is the delivery unit: parents who model movement and healthy eating raise children who practise them, and family-based wellness, weekend sport, home cooking, shared meals, remains the most durable behaviour-change engine India has. Schools and colleges are the institutional frontier: physical education, nutritious meal programmes, mental-health counsellors and health curricula can normalise wellness at the age when it sticks. The opportunity for the wellness industry is to design for the family unit, plans, products and platforms that engage parents and children together, rather than for isolated individuals.

5.3 Workplace wellness: the employer as health institution

Adults spend most of their waking hours at work, which makes the workplace the single most powerful channel for changing adult behaviour at scale. Progressive employers are moving beyond gym reimbursements to comprehensive programmes: preventive health check-ups, mental-health support and employee assistance programmes, nutrition and ergonomics, fitness challenges, and flexible policies that respect sleep and family time. The business case is compelling, wellness programmes reduce absenteeism and presenteeism, lower healthcare and insurance costs, improve retention and productivity, and differentiate employers in a competitive talent market.

The next evolution is outcome-based corporate wellness: programmes measured not by participation alone but by improvements in biometrics, engagement and productivity, and increasingly integrated with the health insurance that

employers provide.

Workplace wellness makes employers a primary channel for adult behaviour change at scale.

5.4 Healthy ageing and the silver economy

India's older population is growing in both size and expectations. The coming decades will see tens of millions of Indians over 60 who are healthier, more educated and more financially secure than any previous generation of elders, and who expect to remain active, engaged and independent. The silver economy spans senior fitness and rehabilitation, age-appropriate nutrition, chronic-disease management, mental stimulation, companionship, and assisted and preventive care. Healthy ageing is also a fiscal strategy: every year of healthy life added lightens the load on families, hospitals and public finances. The goal is to make "ageing well" the default rather than an afterthought of old age, through screening and management of age-related conditions, fall prevention, social connection and lifelong learning.

Healthy ageing turns a growing demographic into an opportunity, mobility, nutrition and social connection keep life in the years.

5.5 The role of employers and institutions

Institutions are the hidden infrastructure of wellness. Employers, schools, universities, hospitals, insurers, housing societies and local governments collectively shape the environment in which individual choices are made. When an employer subsidises screening, a school timetables sport, an insurer rewards activity, or a city builds walkable streets, wellness stops being a personal struggle and becomes a social default. The most effective institutions treat wellness as core business, not corporate social responsibility, measuring workforce health as a strategic asset, underwriting prevention, and treating health as a learning outcome. The institutions that internalise this logic will not only improve lives; they will capture the productivity, loyalty and growth that follow.

The life-stage wellness journey

How the emphasis of wellness shifts across the life course

	Childhood & Adolescence	Young Adults	Working Adults	Seniors
Move	●	●	●	○
Eat	●	●	●	●
Mind	●	●	●	●
Sleep	●	●	●	○
Screen & Prevent	○	●	●	●
Care & Connect	○	○	●	●

● Active focus ○ Emerging focus

Source: TechSci Research synthesis. A filled circle marks the life stages where each dimension is a primary wellness focus; a hollow circle marks where it is of emerging relevance.

CHAPTER 06

Building an Inclusive & Integrated Health & Wellness Ecosystem

From fragmented segments to a connected system that serves every Indian.

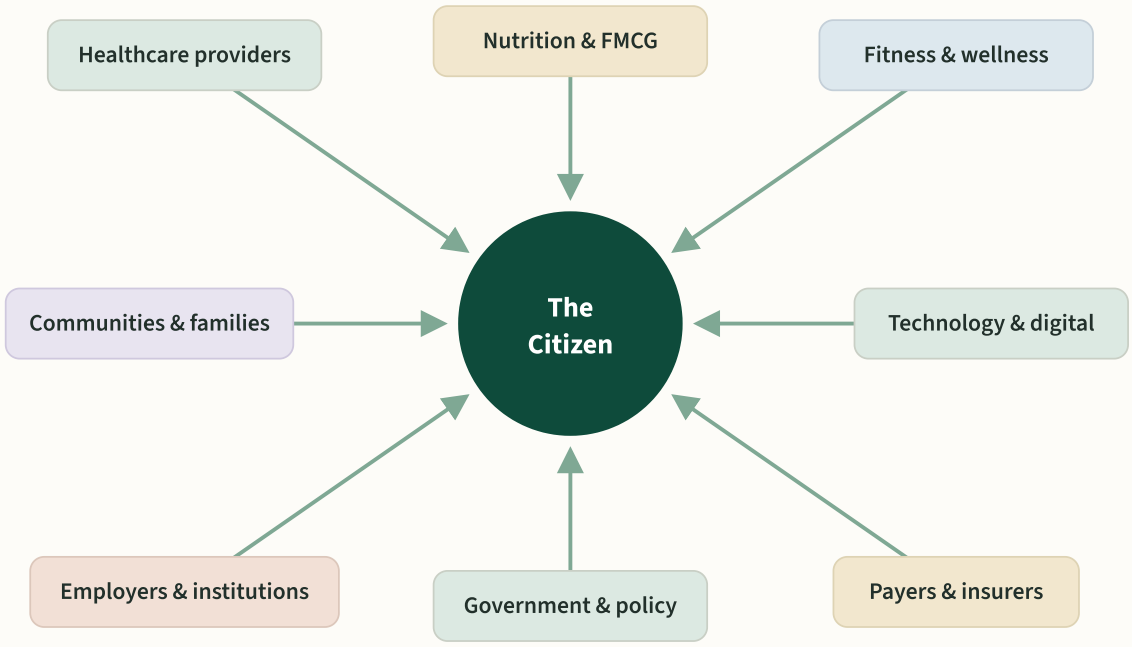
The preceding chapters describe a wellness economy that is real but fragmented: healthcare, nutrition, fitness, mental wellness, technology and insurance each operate in their own lanes. The next phase of growth depends on **integration**, connecting these lanes into a single, inclusive ecosystem where access, affordability, literacy and policy work together, and where no Indian is left behind.

6.1 Convergence: the boundaries are dissolving

The most significant structural trend in global wellness is convergence. Hospitals are opening fitness and nutrition services; food companies are becoming health companies; insurers are becoming wellness platforms; technology companies are entering care delivery. In India, convergence is visible in integrated health platforms, teleconsultation, diagnostics, pharmacy, fitness and mental health under one digital roof, and in the mainstreaming of Ayurveda and yoga alongside modern medicine. The consumer does not think in industry silos: a person managing diabetes wants food, exercise, monitoring, medication, doctor access and emotional support to work as one experience. The ecosystem that delivers that seamless experience, through data interoperability, partnerships and shared incentives, will own the future of wellness.

The citizen at the centre of a converging ecosystem

Seven sectors converging around the individual's wellness journey



Source: TechSci Research synthesis. Convergence means data, services and incentives flowing across these sectors around a single individual.

6.2 Accessibility and affordability

An inclusive ecosystem must reach beyond the metros and middle classes. India's wellness economy is currently urban-skewed, TechSci Research notes that roughly **72% of nutraceutical demand is urban**, and the next growth wave lies in tier-2 and tier-3 cities and rural India. Digital distribution is the great equaliser: telemedicine, e-pharmacy and vernacular apps can carry wellness to places with no gym, no specialist and no supplement aisle. Government data cited in TechSci Research's analysis projects India's e-commerce market at USD 163 billion by 2026, with tier 2/3 cities as the growth engine. Affordability requires deliberate design: smaller pack sizes, subscription models, employer and insurer subsidies, and public-private partnerships that price preventive services for mass adoption. Prevention is the rare intervention that is simultaneously better for health and cheaper for society; the task is to make it cheaper for the individual too.

6.3 Health literacy: the missing input

Every rupee of wellness infrastructure is wasted if citizens cannot act on health information. India's health literacy gap, compounded by 22 scheduled languages and a fragmented information environment, is the binding constraint on the entire ecosystem. Literacy is not just awareness; it is the ability to distinguish credible advice from misinformation, to read a label, to understand a risk score, and to know when self-care ends and clinical care begins. The solution is a national literacy effort delivered through the channels people trust: schools, community health workers, vernacular digital platforms, employers and media. Health literacy is the force multiplier that turns screening into behaviour change and products into outcomes.

6.4 Policy and public-private collaboration

India's public health architecture has already embraced prevention. Ayushman Bharat, with its insurance coverage, health-and-wellness centres and digital mission, is the world's largest programme of its kind. The Ministry of AYUSH has institutionalised traditional medicine, and the Fit India Movement and NP-NCD screening have put prevention on the national agenda. The next step is to connect these initiatives into a coherent preventive-health strategy with clear targets, funding and measurement. Public-private collaboration is the operating model: governments bring scale, trust and data; the private sector brings innovation, capital and execution. The most promising models include platform partnerships that extend public programmes through private digital channels, employer-funded models that deliver preventive care to formal-sector workers and their families, and infrastructure models that bring private capital into public health-and-wellness centres, diagnostics and wellness destinations.

6.5 Insurance: from paying for sickness to paying for health

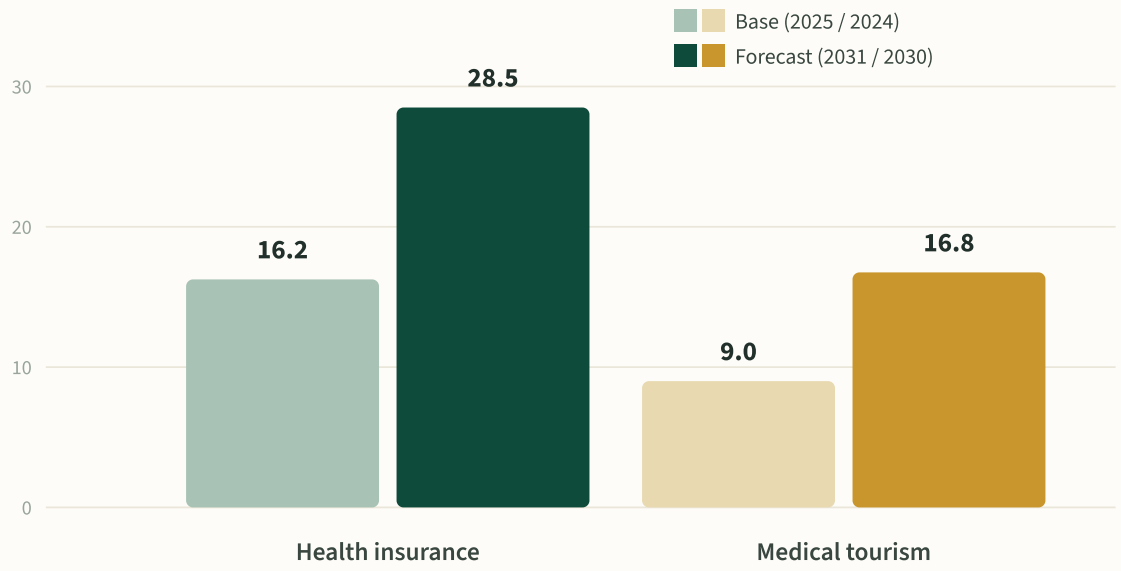
Health insurance is the economic engine of the wellness ecosystem, and it is being reinvented. TechSci Research projects India's health insurance market to grow from **USD 16.17 billion in 2025 to USD 28.52 billion by 2031** at a **9.98% CAGR**. The transformation within that growth is the shift from indemnity to wellness: insurers are beginning to reward policyholders for activity, screening and healthy behaviour with premium discounts, wellness wallets and value-added services. When insurance pays for prevention, the entire ecosystem, providers, employers, platforms and consumers, aligns around keeping people well.

6.6 Wellness tourism: exporting India's heritage

India's wellness assets are not only domestic. Its Ayurveda, yoga, meditation and spa traditions are globally coveted, and the infrastructure of wellness retreats, medical tourism and destination healing is growing. TechSci Research values India's medical tourism market at **USD 9.01 billion in 2024**, projected to reach **USD 16.76 billion by 2030** at an **11.00% CAGR**. Wellness tourism is the export face of the preventive wellness economy, a channel through which India's holistic traditions reach the world, and through which global demand helps fund domestic wellness infrastructure.

Insurance and medical tourism are scaling together

TechSci Research forecasts, USD billion



Source: TechSci Research, India Health Insurance Market and India Medical Tourism Market reports. Values in USD billion.

CHAPTER 07

Key Challenges, Opportunities & Strategic Priorities

An honest look at what stands in the way, and a clear agenda for what to do about it.

No transformation is frictionless. India's journey towards a preventive and holistic wellness culture faces real barriers of cost, awareness, trust, infrastructure and data. This chapter names those barriers, identifies the opportunities they obscure, and translates both into strategic priorities and actionable recommendations for every stakeholder.

7.1 Major barriers to adoption

THE FIVE BARRIERS

1. **Cost and affordability.** Preventive services are often paid out-of-pocket and perceived as discretionary, while treatment is insured and perceived as necessary. Until prevention is priced, subsidised and incentivised like treatment, adoption will lag.
2. **Awareness and health literacy.** A large share of Indians cannot yet distinguish credible wellness advice from misinformation, read a supplement label, or understand their own risk profile.
3. **Trust and quality.** The nutraceutical and wellness-services market suffers from quality variance and weak standardisation, eroding consumer confidence and inviting regulatory risk.
4. **Infrastructure and access.** Gyms, specialists, diagnostics and wellness retail remain concentrated in urban India; rural and tier 2/3 populations are underserved.
5. **Data fragmentation and privacy.** Health data sits scattered across silos, and privacy concerns, however justified, slow the sharing that personalisation and research require.

7.2 Emerging opportunities

- **Preventive diagnostics at scale**, low-cost screening, risk scoring and continuous monitoring, delivered through labs, pharmacies, workplaces and public programmes.
- **Personalised wellness**, biomarker-, DNA- and behaviour-based plans that convert generic products into individualised services with higher willingness to pay.
- **Corporate wellness as a market**, outcome-based employer programmes that bundle screening, mental health, nutrition and fitness; a repeatable, business-to-business-scalable category.
- **The silver economy**, senior fitness, nutrition, care, companionship and longevity services for a growing older population with rising purchasing power.
- **Women's health**, a structurally under-served segment where demand is rising faster than supply.
- **Vernacular digital health**, AI-powered, language-inclusive platforms that carry wellness to the majority of Indians who do not primarily use English.
- **Wellness tourism and traditional medicine**, monetising India's Ayurveda and yoga heritage for global demand.

7.3 Industry gaps

Where demand exists but supply has not yet arrived, there is opportunity. The most visible gaps include: standardised quality certification for nutraceuticals and wellness services; integrated platforms that connect screening, coaching, treatment and insurance; affordable preventive packages for mass-market and rural consumers; workforce development for wellness professionals, counsellors and community health workers; and outcome measurement, the industry has abundant activity metrics but few credible health-outcome metrics to prove value.

7.4 Roles and responsibilities

Stakeholder	Primary role in building a wellness culture
Policymakers & regulators	Set standards, run public programmes, incentivise prevention, protect data, measure national wellness indicators.
Healthcare providers	Extend from treatment into screening, lifestyle medicine and preventive care; integrate with digital platforms.
Corporates & employers	Fund and measure workplace wellness; treat workforce health as a strategic asset.
Technology companies	Build accessible, vernacular, trustworthy platforms; share data responsibly; prove outcomes.
Nutrition, fitness & wellness industry	Raise quality standards, innovate on affordability, and market prevention honestly.
Insurers & payers	Reward prevention through premiums, wellness benefits and value-based products.
Consumers	Adopt daily habits, use credible sources, and demand quality, wellness is ultimately a citizen's choice.

7.5 Actionable recommendations

- **Launch a national preventive-health campaign.** A sustained, multi-year, vernacular public campaign, modelled on successful behaviour-change movements, that makes movement, nutrition, sleep and screening social norms rather than personal projects.
- **Complete the digital health backbone.** Accelerate ABDM adoption, mandate interoperability for wellness platforms, and give every citizen a portable, consent-based health record by 2030.
- **Reward prevention with money.** Insurance premium discounts for screening and activity, tax treatment for wellness spending, and employer-funded preventive benefits for all formal-sector workers.
- **Standardise and certify.** Quality certification and honest labelling for nutraceuticals, wellness services and digital health products, with clear enforcement to build consumer trust.
- **Scale health literacy.** Embed health education in schools, train community health workers as wellness coaches, and use vernacular digital channels to meet citizens where they are.
- **Measure what matters.** Publish national wellness indicators, activity rates, screening coverage, metabolic health, mental wellbeing, alongside disease statistics, so policy and capital follow evidence.

7.6 Models in practice

Three archetypes, illustrative models, not named companies, show how these priorities translate into practice, and each is already being built somewhere in India today.

MODEL 1 — THE EMPLOYER WHO TREATS WELLNESS AS CORE BUSINESS

A large Indian employer bundles annual preventive screening, mental-health support, fitness and nutrition coaching into a single programme and links it to health insurance, measuring biometrics and claims before and after. The result: higher participation, measurable improvement in metabolic health, lower absenteeism and a workforce that sees the company as an institution that cares.

MODEL 2 — THE VERNACULAR TELEMEDICINE PLATFORM

A telemedicine platform connects patients in tier 2/3 cities and rural towns to specialists in metro hospitals, in the patient's own language, and closes the loop with e-pharmacy delivery and at-home diagnostics. It turns the scarcity of specialists into a solved problem, and it is the kind of model behind TechSci Research's projection that India's telemedicine market will compound at 20.75%.

MODEL 3 — THE MODERN AYURVEDA BRAND

An Ayurveda brand standardises traditional formulations, validates them with modern science, certifies quality and sells through digital and international channels. It captures the 18.4% growth of India's ayurvedic products market while answering the industry's hardest question, how to scale tradition without diluting it.

7.7 Ten questions every leader should ask

- Do we measure wellness outcomes, or just activity and participation?
- Is prevention priced and incentivised in our products the way treatment is?
- Does our workforce have a real wellness programme, with a measured return?
- Is our health data interoperable, portable and genuinely owned by the citizen?
- Are our nutraceutical and wellness products certified and honestly labelled?
- Do our platforms serve vernacular, tier 2/3 and rural users, or only metros?
- Is women's health designed into our products and services, or an afterthought?
- Are we building for the silver economy, or only for the young?
- Do our AI and data practices earn trust, or erode it?
- Are we partnering across sectors, or building silos?

CHAPTER 08

The Way Forward

A vision for 2030, and the first steps to get there.

India's next health chapter will be written in everyday choices, not hospital wards. This closing chapter sets out the vision of what that chapter looks like, and the conviction that it is within reach.

8.1 Vision 2030

By 2030, India can be a country where prevention is the default, where every citizen owns a digital health record, knows their key health numbers and is screened for the major preventable diseases on a regular rhythm; where workplaces, schools and cities are designed to make the healthy choice the easy choice; where Ayurveda, yoga and modern medicine work as one integrated system; and where a thriving, exportable wellness economy creates jobs, innovation and national pride.

The goal

The goal is not merely to add years to life, but life to years, and to make India the world's most credible example of a nation that chose prevention.

8.2 Key takeaways

- **The demand is real and compounding.** TechSci Research's market intelligence shows India's preventive wellness segments growing at 8 to 20% annually, ayurvedic products at 18.4%, nutraceuticals at 11.47%, telemedicine at 20.75% and e-pharmacy at 12.62%, against a disease burden that makes prevention an economic necessity.
- **Wellness is multi-dimensional.** Physical fitness, nutrition, mental well-being, sleep, preventive care and healthy ageing form one integrated stack, not separate markets.
- **Technology is the operating system.** Digital health, wearables, AI and e-commerce are collapsing the distance between intention and action, and carrying wellness beyond the metros.
- **Institutions are the delivery channel.** Employers, schools, insurers and policymakers are the levers that turn individual effort into a social default.
- **Integration and inclusion are the growth strategy.** The ecosystem that connects sectors, and reaches every Indian, will compound faster than any single segment.

8.3 Priority actions

0. **Make prevention a national habit.** Campaign, curriculum and urban design that make movement and nutrition the default.
0. **Complete the digital health backbone.** ABDM, interoperability and a portable consent-based health record for every citizen by 2030.
0. **Reward wellness.** Insurance, tax and employer incentives that pay for prevention, not just treatment.
0. **Raise standards.** Certification and honest labelling across nutraceuticals, wellness services and digital health.
- **Scale literacy.** Schools, community workers and vernacular digital channels that meet citizens where they are.

0 **Measure outcomes.** National wellness indicators that guide policy and capital with evidence.

8.4 Conclusion

India has a once-in-a-generation opportunity. Its demographic dividend, its ancient wellness traditions, its digital infrastructure and its fast-growing consumer markets have aligned at exactly the moment the world is rethinking health. The choice before the nation is not whether to build a culture of preventive and holistic wellness, but how quickly and how inclusively to do so. The evidence is unambiguous: the markets are ready, the technology is ready, the policy machinery is engaged, and in many respects the consumer is ahead of the industry. What remains is leadership, the coordinated, sustained commitment of policymakers, corporates, providers, technologists and citizens to make prevention the organising principle of Indian health.

The ASSOCHAM Health & Wellness Summit is the moment to make that commitment. Every stakeholder in this room, and every reader of this paper, is invited to adopt one concrete wellness commitment for the year ahead: an employer that funds prevention, a policymaker that incentivises it, a provider that integrates it, a technologist that democratises it, or a citizen who practises it. A healthier India is built one habit, one policy, one partnership at a time, and it begins today.

APPENDIX

Sources, Methodology, Market Data & Glossary

Where the evidence comes from, and how to read it.

Methodology

This white paper synthesises published market research, official statistics and industry practice. Market figures attributed to TechSci Research are drawn from its published market reports (2024 to 2026 editions); figures without a TechSci attribution are drawn from the named public source. Figures are presented as published and may be revised by their sources; CAGR periods vary by report and are noted where relevant. The analytical framework, the six-dimension wellness stack, the pillars of longevity and the converging ecosystem, is a TechSci Research synthesis.

Key sources

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Market data reference

The table below consolidates the TechSci Research figures quoted throughout this paper as a single reference point.

Segment (India unless noted)	Base value	Forecast value	CAGR
Ayurvedic products	USD 8.12 bn (2024)	USD 22.37 bn (2030)	18.4%
Nutraceuticals	USD 6.14 bn (2025)	USD 11.77 bn (2031)	11.47%
Health & wellness food	USD 0.99 bn (2025)	USD 1.63 bn (2031)	8.62%
Health ingredients	USD 3.58 bn (2023)	—	>10%
Telemedicine	USD 1.54 bn (2024)	—	20.75%
E-pharmacy	USD 0.39 bn (2024)	USD 0.80 bn (2030)	12.62%
Medical tourism	USD 9.01 bn (2024)	USD 16.76 bn (2030)	11.00%
Health insurance	USD 16.17 bn (2025)	USD 28.52 bn (2031)	9.98%
Fitness apps (global)	USD 2.07 bn (2025)	USD 5.02 bn (2031)	15.91%
Mental health apps (global)	USD 6.78 bn (2025)	USD 16.14 bn (2031)	15.55%
Sleep apps (global)	USD 2.88 bn (2025)	USD 4.26 bn (2031)	6.74%
Women's health (global)	USD 16.76 bn (2025)	USD 25.49 bn (2031)	7.24%
Digital health (global)	USD 200.82 bn (2025)	USD 282.46 bn (2031)	5.85%

Source: TechSci Research market reports (2024 to 2026 editions). CAGR periods vary by report; figures as published.

Glossary

Term	Meaning
ABDM	Ayushman Bharat Digital Mission, India's national digital health infrastructure for IDs, records and consent-based data sharing.
NCD	Non-communicable disease, chronic conditions such as diabetes, cardiovascular disease, cancer and respiratory disease that are largely preventable.
Nutraceuticals	Food-derived products with health benefits beyond basic nutrition, including dietary supplements and functional foods.
CAGR	Compound annual growth rate, the year-on-year growth rate of a market over a period, assuming steady compounding.
Telemedicine	Remote clinical consultation and care delivery using telecommunications technology.
E-pharmacy	Online platforms that dispense medicines, supplements and health products to consumers.
Wellness economy	The combined economic activity of wellness-related industries, from nutrition and fitness to mental health and tourism.
Longevity	The science and practice of extending healthy, productive lifespan rather than merely delaying death.
Biomarker	A measurable biological indicator, such as blood sugar or cholesterol, used to assess health status and risk.
Personalisation	Tailoring health and wellness products, plans and services to an individual's data, biology and behaviour.

ABOUT

About ASSOCHAM

The Associated Chambers of Commerce & Industry of India

The Associated Chambers of Commerce & Industry of India (ASSOCHAM) is the country's apex national chamber since 1920. It advocates actionable policy suggestions to strengthen the Indian economy by leveraging its extensive membership reach of over 450,000 companies, comprising large corporates and SMEs.

With over 70 Sector and State Councils, ASSOCHAM effectively represents diverse segments of Indian industry and focuses on aligning industry priorities with the nation's growth aspirations.

ASSOCHAM HEALTH & WELLNESS SUMMIT 2026

This Knowledge Paper was released at the ASSOCHAM 4th Health & Wellness Summit 2026, which brings together industry leaders, policymakers, researchers, and innovators to chart the strategic direction for India's Healthcare & Wellness sector.

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About TechSci Research

Research-based management consulting

TechSci Research is a research-based management consulting firm providing market research and advisory solutions to customers worldwide, spanning a wide range of industries. We help organizations identify new market opportunities, growth engines, and innovative strategies to capture market share enabling our clients to lead rather than follow market trends.

Led by a dynamic team of industry experts, TechSci Research delivers high-value, insight-driven research and advisory services. Our cutting-edge research model combines decades of knowledge with advanced technology to provide actionable intelligence in a more usable, interactive, and client-focused format an innovative alternative to traditional market research.

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Towards a Healthier India

Building a Culture of Preventive & Holistic Wellness

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MARKET DATA: TECHSCI RESEARCH MARKET REPORTS (2024 TO 2026 EDITIONS) AND CITED PUBLIC SOURCES