Uttarakhand
Wellness & Healthcare

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Foreword

Uttarakhand is a land steeped in many layers of history, culture, ethnicity, religion, and geography. Some of Hinduism’s holiest shrines and temples, which are also pilgrimage centers, are located in the mountains of Uttarakhand and thus the state is rightly called God’s Land.

Uttarakhand is well known for its potential for catering to different kinds of tourism activities from adventure to leisure to eco-tourism and most prominently wellness, healthcare and medical tourism. It is not just the land of mountains and rivers offering adventure attractions but also the land of serene valleys offering a beautiful distraction from the bustling city life around the world.

Wellness and tourism are some of the most prominent industries in the state and this report brings out the niche industry of Uttarakhand which has been thriving over the years contributing to the state’s tourism industry. This report brings out details of this niche industry of Uttarakhand state which has been thriving over the years contributing to the state’s tourism industry.

The Government of Uttarakhand has undertaken several policy measures and incentives to encourage the inflow of investment into the various sectors of its economy. An online Single Window mechanism facilitates investors to provide information and take approvals. The Government is also providing land, incentives, and subsidies under various state and central policies to promote investments in Uttarakhand.

There is tremendous scope for expanding the wellness industry in Uttarakhand and we invite all the businesses in wellness, tourism, and allied sectors to explore the untapped potential that Uttarakhand offers.

– Pushkar Singh Dhami
Chief Minister, Uttarakhand
Uttarakhand is a complete wellness destination that rejuvenates and revitalizes the soul and ushers in positive energy. Known for its spirituality and Yoga, Uttarakhand is known as the 'Yoga Capital of the World'. For centuries, the state has attracted people from all over the world due to its reputation as a spiritual learning place.

Not only is Uttarakhand home to several luxurious wellness centres that offer detoxifying and relaxing Ayurvedic spas, the region is blessed with dense forests, rolling hills, lush meadows, snowy slopes, and mighty mountain ranges that offers visitors a respite from the fast-paced city life and a chance to soak in nature’s peace.

Wellness and Healthcare tourism in India is as old as tourism itself, and Uttarakhand can be easily called the capital of this form of tourism in the country. A land of myths and mountains, Uttarakhand is one of the most beautiful northern states of India. Snow-capped Himalayan peaks, serpentine rivers, revered temples, quaint villages, vibrant culture, and World Heritage Sites, Uttarakhand’s sheer natural beauty and diversity attracts travellers from across the world.

We thank Invest India for collaborating with the state to publish this report on Wellness Industry in Uttarakhand. The report maps the wellness industry scenario in the state and highlights more opportunities for the service providers and wellness seekers. It also provides important information for potential investors and businesses looking to exploit the opportunity Uttarakhand presents in form of an alternate medical tourism industry.

I hope that this report will contribute towards changing the way people travel and bring more limelight to the wellness and healthcare industry not just in Uttarakhand but the entire country.
Building upon the idea of a healthy and a fit nation, our Hon’ble Prime Minister Narendra Modi emphasized the growing need for wellness in the 75th year of ‘Heartfulness’ and talked about India’s idea of wellness- “Our idea of wellness goes beyond curing a disease. There has been extensive work done on preventive healthcare...Our vision for wellness is as global as it is domestic... The world is looking at health and wellness seriously, especially after COVID-19. India has much to offer in this regard. Our yoga and Ayurveda can contribute to a healthy planet.”

Uttarakhand, the 27th state of the republic of India, has benefited from the growing consciousness in health and wellness. Uttarakhand caters to different kinds of tourism activities ranging from adventure, leisure, ecotourism and most importantly wellness and healthcare. The natural ecosystem of the state lends itself to making Uttarakhand an attractive destination for tourists globally. The state boasts of enchanting views, simplistic living, ample natural resources, and availability of skilled and semi-skilled workforce.

Known as the ‘Yoga capital of the World’, Uttarakhand has earned its reputation as a place of spiritual learning and is home to several ashrams, health centres, retreats, and high-end spas. As per 2019 statistics, nearly 39.06 Million (Mn) domestic and over 0.16 Mn foreign tourists visit Uttarakhand every year. Additionally, the state’s tourism industry contributes 1.5 per cent to India’s economy, with a turnover of nearly INR 13.98 billion (~ USD 200 Mn).

Providing a boost to the wellness sector, the Uttarakhand state government has introduced a slew of reforms. It has formed two key bodies for promoting the wellness sector, namely, the Herbal Research & Development Institute and the Centre for Aromatic Plants.

To promote investments in the state, the government provides land, incentives and subsidies under various state and central policies. In addition to the various reforms, the government has taken a keen interest in the state’s potential by building and upgrading infrastructure and implementing a single-window system to streamline processes and encourage investors.

This report focuses on providing an overview of the wellness sector and its growth potential for the state of Uttarakhand. It presents a range of exciting incentives, support mechanisms and opportunities offered by the state government. The report further presents and establishes Uttarakhand as India’s wellness and healthcare destination.

I hope you enjoy reading the report and find the information insightful. We invite you to come explore Uttarakhand and invest!
Introduction to Uttarakhand

The 27th state of Republic of India, Devbhoomi Uttarakhand (28°43' N to 31°27' N) was formed in the year 2000 after being separated from the large state of Uttar Pradesh. Uttarakhand is mentioned in several historical texts and is indeed, a destination to explore the riches of Indian culture, history, and natural beauty that borders Nepal to the east; the state of Uttar Pradesh to the south; and Himachal Pradesh to the west and north-west.

Uttarakhand is well known for its potential for catering to different kinds of tourism activities from adventure to leisure to eco-tourism and most prominently wellness, healthcare and media tourism. Uttarakhand’s natural ecosystem has attracted a fair share of tourists leveraging its booming wellness sector. Boasting of enchanting views of the Himalayas, and cultural ethos that speaks of simplistic living amidst nature and harmony – Uttarakhand is a land of sublime natural beauty and serene spirituality. With the blend of Himalayan atmosphere, availability of natural resources and ample skilled and semi-skilled workforce, Uttarakhand has emerged as an important wellness destination. Uttarakhand’s charismatic beauty extends to its culture and people. Natives of Uttarakhand are divided by regions and are thus, better known as Kumaoni (inhabitants of Kumaon region) and Garhwali (inhabitants of Garhwal region). Apart from these, Uttarakhand is also home to ethnic groups like Bhotias, Jaunsaries, Tharus, Bokshas, and Rajis.

Although a major part of the region speaks native languages like Kumaoni and Garhwali, other regional languages like Hindi, Urdu, and Punjabi are also widely spoken. The people of Uttarakhand indulge in vivid celebrations and performing of rituals around the year due to their deep-rooted connection with nature and their rich mythology. Much like their lifestyle, the festivals and fairs in Uttarakhand are also simple yet culturally rich. Each season is welcomed with hearty folk songs, and dance and so are the seasons of sowing and harvest, which are celebrated with local festivals such as Phool Dei and Harela. The state is composed of 13 districts which are well connected by strong road networks, 5 airports and 64+ heliports (37 operational and 27 under construction).* Major cities like Dehradun, Haldwani and Pithoragarh have both air and rail connectivity. Two major airports of Uttarakhand are in Dehradun and Pant Nagar. In 2018-19, Dehradun airport handled 7,374 aircraft movements and 709,227 passengers.* The existing road networks are also being upgraded via a major road upgradation program under the Char Dham road project, which will highly reduce the transit time to many wellness destinations in the state.

*Source: https://investuttarakhand.com/uttarakhandtourism/
In terms of travel and tourism, Indians indulged in 56 million wellness related trips both domestic and international in 2017, which accounted for a 45 per cent growth from 2015.* This growth scale remained largely consistent as by 2018, travel and tourism was the largest service industry in India worth approximately USD 234 Billion (Bn).¹ The industry has since become one of the largest foreign exchange earners in India with earnings of USD 29.96 Bn over Jan 2019 – Dec 2019 equating a growth of 4.8 per cent over the previous year.²

Approximately over 39.06 Million (Mn) domestic and over 0.16 Mn foreign tourists visit Uttarakhand every year, as per 2019 statistics.³ The state’s tourism industry has a turnover of nearly INR 13.98 Bn (USD 200 Mn approximately) and contributes 1.5 per cent to the India’s economy.⁴ The state offers spectacular experiences for tourists who like the thrills of adventure water sports and wildlife to enjoy the calm, pristine beauty of mountain peaks, lakes and hill stations.

²Source: www.ibef.org/industry/indian-tourism-and-hospitality-industry-analysis-presentation
³Source: www.investuttarakhand.com/uttarakhandtourism

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**Growth of Tourism Industry (in Mn)**

<table>
<thead>
<tr>
<th></th>
<th>2001</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic Tourists</td>
<td>10.54</td>
<td>39.06</td>
</tr>
<tr>
<td>Foreign Tourists</td>
<td>0.05</td>
<td>0.16</td>
</tr>
</tbody>
</table>

Source: www.investuttarakhand.com/uttarakhandtourism

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The state is also known for its Hindu pilgrimage sites (Char Dham, Haridwar, Rishikesh, Panch Prayag etc.) and ‘Ashrams’ where you can connect with your inner self. Known for its spirituality and Yoga, Uttarakhand is known as the ‘Yoga Capital of the World’. For centuries, the state has attracted people from all over the world due to its reputation as a place of spiritual learning, hence, a home to several ashrams, health centres, retreats and high-end spas.

Rishikesh which etymologically means ‘Lord of the Senses’, is a major centre for spirituality and yoga study. The city has attracted people from all across the world including the Beatles’ who visited in 1968. Located at the banks of holy river Ganges, the city is already popular as the Yoga capital of the world. The city also hosts the evening ‘Ganga Aarti’, a spiritual gathering on the sacred Ganges river.

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Some well-known Ashrams in the state of Uttarakhand include:

- Yoga Study centre, Rishikesh
- Sivananda Ashram (Divine life of society), Tehri
- Yoga Niketan, Rishikesh
- Omkarananda Patanjali Yoga Kendra, Tehri
- Parmarth Niketan, Rishikesh
- Ved Niketan
- Transcendental Meditation Centre of Maharishi Mahesh Yogi
- Patanjali Yogpeeth
- Dev Sanskriti University Shantikunj, Haridwar

Uttarakhand has benefited from the growing consciousness in health and wellness. Within wellness, Ayurveda and alternative medicine, are areas that are gaining huge traction as well as attracting a vast tourist base.

The state is blessed with rich biodiversity (including rich medicinal and aromatic plants) and its forest area accounts to around 70 per cent of the total area. This conducive mix of atmosphere, natural resources and spiritual vibrations itself promotes health and wellness and therefore, within the state, wellness and AYUSH (annual turnover of around INR 120 Bn) has been allotted the status of industry, which allows the products and services all sectoral benefits and schemes of the government. AYUSH is an acronym for Ayurveda, Yoga and Naturopathy, Unani, Siddha, and Homeopathy which are six systems of alternative medicine practiced in India.

Additionally, India is the second largest exporter of Ayurveda and alternative medicine globally, with its biggest markets being Western Europe, Russia, USA, Kazakhstan, UAE, Nepal, Ukraine, Japan, Philippines and Kenya. With 9,000 units engaged in the manufacture of AYUSH drugs across the nation, the AYUSH products market with over-the-counter products, is worth about INR 40 Bn (USD 0.54 Bn). The domestic trade of the industry is of the order of INR 9000 crore (USD 1.3 Bn) while the Indian medicinal plants and their products account for exports in the range of ~USD 1503 Mn. With 100 per cent FDI allowed in various sectors, investors and corporate houses are increasingly investing in the state’s AYUSH sector.

Uttarakhand has everything in store. With predictions for the wellness industry positing a positive outlook, there is immense scope for businesses to make the most out of the forecasts. To provide a boost to the wellness sector, the state government has implemented an online single window system to facilitate investors and an investment promotion and facilitation centre to help in all the paperwork and formalities. All clearances from various departments can be obtained from this single window and no physical visits to a particular office are necessary for permissions and clearances. The government is also providing land, incentives and subsidies under various state and central policies to promote investments in Uttarakhand.

*Source: https://www.siidcul.com/invest/ayush.pdf*
An important part of Uttarakhand’s wellness ecosystem is the Uttarakhand Ayurveda University. The university has ten colleges providing undergraduate and postgraduate training in Ayurveda. Further, in various other universities and colleges in Uttarakhand, hundreds of yoga experts are trained each year and provided training to become skilled professionals such as Panchakarma assistants, Ayurvedic pharmacists and other paramedical staff. The Uttarakhand wellness and healthcare investment opportunity is diverse and plentiful, offering established wellness educational institutes, abundant resources and scenic locations. The wellness ecosystem provides room for creativity and growth as well as cooperation and joint ventures, thus, making it ideal for new ventures and established businesses. The government has taken a keen interest in the state’s potential by undertaking numerous reforms, building and upgrading infrastructure, and implementing a single-window system to streamline processes and encourage investors.

**OVERVIEW OF WELLNESS TOURISM IN INDIA (2017)**

<table>
<thead>
<tr>
<th>Rank</th>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>7th</td>
<td>in the top 20 wellness tourism markets</td>
<td></td>
</tr>
<tr>
<td>2nd</td>
<td>in terms of leading growth markets for wellness tourism</td>
<td></td>
</tr>
<tr>
<td>10th</td>
<td>among the top 20 spa markets in the world</td>
<td></td>
</tr>
<tr>
<td>3rd</td>
<td>in the top 10 wellness tourism markets</td>
<td></td>
</tr>
<tr>
<td>USD 16.3 Bn</td>
<td>in expenditure</td>
<td></td>
</tr>
<tr>
<td>Top 10</td>
<td>spa markets in Asia Pacific</td>
<td></td>
</tr>
</tbody>
</table>

**MARKET SIZE**

- **Nutraceuticals:** Estimated at USD 4 Bn in 2017
- **Alternate therapies:** The products market is worth USD 0.6 Bn with over-the-counter products constituting 75 per cent

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**Spa:** Valued at **USD 1.7 Bn** in 2017\(^\text{13}\)

**Fitness and slimming:** Estimated at **USD 14 Bn** in 2017\(^\text{12}\)

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**UTTARAKHAND STATE HIGHLIGHTS\(^\text{14}\)**

**Population:**
1,12,170 (2019-20 (PE))

**Literacy rate:**
79.63%

**Handicrafts units:**
54,047

**MSMEs:**\(^*\)
64,597 units
USD 1.88 Bn (INR 136.15 Bn) investment
3,24,225 employment

\(^*\text{as on March 2020}\)

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Large Units:*  
327 units  
USD 5.24 Bn  
(INR 378.94 Bn) investment  
1,11,221 employment

AYUSH INFRASTRUCTURE¹⁵

1.38 Mn  
registered practitioners

More than  
27,000  
dispensaries

702  
undergraduate colleges

Annual intake of  
52,720  
students

4000  
hospitals in the  
public sector

Annual intake of  
52,720  
students

¹⁵. https://www.makeinindia.com/sector/wellness
Uttarakhand: Wellness & Healthcare

**8,954**
licensed drug manufacturing units

**5,885**
Annual admission of scholars

**26**
AYUSH information cells have been set up in 24 countries

**AYUSH Industrial Clusters**

- **Amritsar, Punjab**
  - Herbal Health Research Consortium

- **Jaipur, Rajasthan**
  - Ayushraj Enterprises

- **Bavdhan Khurd, Pune**
  - Maharashtra Ayurved Center

- **Ratnagiri, Maharashtra**
  - Konkan Ayur Pharma

- **Bangalore, Karnataka**
  - Ayurpark Health Care

- **Thrissur, Kerala**
  - CARE Keralam, Kinfra Small Industries Park

- **Ganjam, Orissa**
  - Rushikulya Ayurvedic Cluster

- **Uttarakhand**
  - Sanskar Ayush Medicare

- **Anantapur, Andhra Pradesh**
  - Lepakshi Ayush Park

- **Sriperumbudur, Tamil Nadu**
  - Traditional Ayurveda Cluster

Key Players

AyurVaidKalmatia, Almora
Vana, Dehradun
Ananda, Rishikesh
Marriott, Mussoorie

Taj, Rishikesh
Parmarth Niketan, Rishikesh
Patanjali, Haridwar
Forest Essentials, Haridwar

Sri Sri Ayurveda, Pauri
Himalaya Drug Company, Dehradun
Dabur, Udham Singh Nagar

Number of AYUSH Registered Practioners (doctors) in Uttarakhand

<table>
<thead>
<tr>
<th>Year</th>
<th>Ayurveda</th>
<th>Unani</th>
<th>Homeopathy</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>1,000</td>
<td>500</td>
<td>200</td>
</tr>
<tr>
<td>2015</td>
<td>1,500</td>
<td>700</td>
<td>300</td>
</tr>
<tr>
<td>2016</td>
<td>2,000</td>
<td>1,000</td>
<td>400</td>
</tr>
<tr>
<td>2017</td>
<td>2,500</td>
<td>1,500</td>
<td>500</td>
</tr>
<tr>
<td>2018</td>
<td>3,000</td>
<td>2,000</td>
<td>600</td>
</tr>
<tr>
<td>2019</td>
<td>3,500</td>
<td>2,500</td>
<td>700</td>
</tr>
<tr>
<td>2020</td>
<td>4,000</td>
<td>3,000</td>
<td>800</td>
</tr>
</tbody>
</table>

Source: www.main.ayush.gov.in/sites/default/files/Medical%20Manpower%20Table.pdf
Advantage Uttarakhand

EASE OF DOING BUSINESS (EODB) IN THE STATE

The government of Uttarakhand houses a dedicated ‘Investor Facilitation Centre’ (IFC) which is a one stop-shop for investors and businesses to provide complete handholding support in a structured, focused and comprehensive manner. IFC focuses on investment promotion and facilitation. It also carries out direct engagement and consultation with investors and stakeholders, ensuring investment realization and sustainable industrialization in the state. Therefore, it lays huge emphasis on business facilitation by creating an enabling environment for industries to set up and start their operations in the state. Industrial electricity tariff in Uttarakhand is one of the lowest across states in India. The state has also developed robust mechanisms to ensure time bound delivery of government services through ‘The Right to Service Act, 2011’, with more than 100 investor related services. Together with low electricity tariffs, ample availability of land and an efficient system in place, the state is an attractive investment destination.

SINGLE WINDOW CLEARANCE

Under Uttarakhand’s ‘Ease of Doing Business’ initiative, a web based Single Window Clearance System - www.investuttarakhand.com has been implemented, allowing investors to avail all necessary state government approvals to establish and start their business operations through a single platform without any physical interaction with the approving and licensing authority.

ASSURED & TIMELY DISPOSAL OF APPLICATIONS ALONG WITH DEEMED APPROVALS

01 In-Principle Approval: Decisions on Project Proposals within 15 days

02 Pre-Establishment Approvals for Pre-Establishment Services within 15 days

03 Pre-Operations Approvals for Pre-Operations Services within 30 days

200+ investor services covered under the Uttarakhand Single Window Facilitation and Clearance Act, 2012 & the Uttarakhand Right to Services Act, 2011

The platform also allows investors to access requisite information with regard to approvals required, application process, document checklist, approval timelines, fees, forms and policies etc. The portal also allows investors to easily file queries and grievances, which are then received at the highest levels of government and expedited for speedy resolution.

The state of Uttarakhand has, thus, been at the forefront of the Department for Promotion of Industry and Internal Trade’s (DPIIT’s) ease of doing business initiative. With a compliance of 96.13 per cent on the Ease of Doing Business framework, the state has achieved 100 per cent under 7 out of 10 reform areas identified by DPIIT in 2016, making it first amongst the hill states and the most improved state overall in EoDB rankings in India.16

### Hassle free setup and operations in the state

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Online Single Window System</strong></td>
<td>For all required approvals for setting up business</td>
</tr>
<tr>
<td><strong>Investment facilitation centre</strong></td>
<td>To handhold investors</td>
</tr>
<tr>
<td><strong>Geographic information system</strong></td>
<td>Of all land banks</td>
</tr>
<tr>
<td><strong>Self/Third party certification</strong></td>
<td>In lieu of departmental inspections</td>
</tr>
<tr>
<td><strong>Use of modern supervisory control and data acquisition system</strong></td>
<td>To ensure reliable supply of electricity</td>
</tr>
<tr>
<td><strong>Single Point Sector Clearances</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Objective Criteria for land allotment</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Auto renewal of Consent to Establish, Consent to Operate</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Single integrated return for all labour laws</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Commercial Court set up in Dehradun with entire state jurisdiction</strong></td>
<td></td>
</tr>
<tr>
<td>Name of Service</td>
<td>Authority/ Agency/Office/ Department Officer granting approval</td>
</tr>
<tr>
<td>--------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------</td>
</tr>
<tr>
<td>Registration under clinical establishment act (under The Clinical Establishment Act, 2010)</td>
<td>Department of Medical Health &amp; Family Welfare</td>
</tr>
<tr>
<td>License to manufacture for sale of Ayurvedic (including Sidhha) or Unani drugs (under Drugs &amp; Cosmetics Act, 1940)</td>
<td>Department of Ayurvedic and Unani Services</td>
</tr>
<tr>
<td>Land allotment in departmental industrial estates</td>
<td>Directorate of Industries</td>
</tr>
<tr>
<td>Application for land/plot allotment</td>
<td>SIIDCUL</td>
</tr>
<tr>
<td>Application for new connection LT/HT line-non domestic/industrial</td>
<td>Uttarakhand Power Corporation Limited</td>
</tr>
<tr>
<td>Application for water connection</td>
<td>State infrastructure &amp; industrial development corporation of Uttarakhand Limited</td>
</tr>
<tr>
<td>Application for water connection</td>
<td>Uttarakhand Jal Sansthan</td>
</tr>
<tr>
<td>Application for building plan approval</td>
<td>State Industrial Development Authority</td>
</tr>
<tr>
<td>Application for completion cum occupancy certificate</td>
<td>State Industrial Development Authority</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Name of Service</th>
<th>Authority/ Agency/Office/ Department Officer granting approval</th>
<th>Type of requirement (Setting up of business/ starting operations)</th>
<th>Timeline (in days)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consent to establish under water (Prevention and Control of Pollution) Act, 1981</td>
<td>Uttarakhand Environment Protection and Pollution Control Board</td>
<td>Setting up of business</td>
<td>30 days/ 60 days/ 90 days*</td>
</tr>
<tr>
<td>Consent to establish under air (Prevention and Control of Pollution) Act, 1981</td>
<td>Uttarakhand Environment Protection and Pollution Control Board</td>
<td>Setting up of business</td>
<td>30 days/ 60 days/ 90 days*</td>
</tr>
<tr>
<td>Consolidated consent &amp; authorization under water act, 1974, air act, 1981 &amp; authorization under the hazardous and other wastes (management and transboundary movement) rules, 2016</td>
<td>Uttarakhand Environment Protection and Pollution Control Board</td>
<td>Starting operation</td>
<td>30 days/ 60 days/ 90 days*</td>
</tr>
<tr>
<td>Application for fire establishment NOC (National Building Code, 2005)</td>
<td>Uttarakhand fire &amp; emergency services</td>
<td>Setting up of business</td>
<td>30 days</td>
</tr>
<tr>
<td>Application for pre-operational fire NOC (National Building Code 2005)</td>
<td>Uttarakhand fire &amp; emergency services</td>
<td>Starting operations</td>
<td>30 days</td>
</tr>
<tr>
<td>Site plan approvals under Factories Act, 1948</td>
<td>Department of Labor</td>
<td>Starting operations</td>
<td>30 days</td>
</tr>
<tr>
<td>Registration of Factories under Factories Act, 1948</td>
<td>Department of Labor</td>
<td>Starting operations</td>
<td>30 days</td>
</tr>
</tbody>
</table>

*30 days- Green category, 60 days- Red category, 90 days- Red category
<table>
<thead>
<tr>
<th>Name of Service</th>
<th>Authority/ Agency/Office/ Department Officer granting approval</th>
<th>Type of requirement (Setting up of business/ starting operations)</th>
<th>Timeline (in days)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Registration under Uttarakhand Dookan Aur Vanijya Adhistan Adhiniyam, 1962</td>
<td>Department of Labor</td>
<td>Starting operations</td>
<td>1 day</td>
</tr>
<tr>
<td>License under Contract Labour Act, (Regulation and Abolition), 1970</td>
<td>Department of Labour</td>
<td>Starting operations</td>
<td>30 days</td>
</tr>
<tr>
<td>Registration under GST (Uttarakhand Goods &amp; Services Tax Rules, 2017)</td>
<td>Department of Commercial Tax</td>
<td>Starting operations</td>
<td>3 days</td>
</tr>
</tbody>
</table>
KEY INVESTABLE PROJECTS ACROSS WELLNESS AND AYUSH SECTORS

The state of Uttarakhand is focused on developing more centres to attract visitors from international as well as domestic markets. These centres will be developed in (Public-Private Partnership) PPP mode or in private sector only, for which financial support is available under Marketing Development Assistance (MDA) scheme of Government of India.

Development of state-of-art Yoga and Meditation centres at various locations (YOG GRAM)

The proposed Yog Grams in Uttarkashi and Champawat districts will be standard, licensed and well-equipped Yoga centres with state-of-the-art facility and space to accommodate around 50 people per time. These centres will have the facility to practice yoga in a fun-filled and relaxing atmosphere. Both the projects are worth INR 5 crore (USD 691.27 thousand) and will have a 2-year timeline, as indicated.

Development and operation of a Global Wellness City

Health and wellness tourism refers to trips that are taken by tourists with the principal purpose to improve their health and/or wellbeing. Typically, this includes one or more of the following: physical fitness programmes, spa visits, medical treatment, health farms, beauty treatment, and many different alternative therapies derived from different cultures.

The proposed 5-year project is to build a world class Global Wellness City catering to health and wellness tourists.

Opportunities for investors:
• Construction of facilities & medical infrastructure
• Hospitality: Hotels & Accommodation
• Shops & retail outlets
• Helipads

Development of AYUSH, Panchkarma, Treatment and Yoga in existing homestays

The proposed project is to set up state-of-art AYUSH, Panchkarma and yoga treatment centres in existing homestays.
to help people lead healthier life and reduce stress and shall have facilities for both the guests and locals to practise yoga, meditation and Panchakarma therapy as well as a herbal garden. The 1 crore (USD 138.25 thousand) project is expected to have a two-year timeline.

<table>
<thead>
<tr>
<th>Project Location</th>
<th>No. of Homestays</th>
</tr>
</thead>
<tbody>
<tr>
<td>Almora</td>
<td>210</td>
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<tr>
<td>Bageshwar</td>
<td>109</td>
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<tr>
<td>Chamoli Garhwal</td>
<td>253</td>
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<tr>
<td>Champawat</td>
<td>26</td>
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<tr>
<td>Dehradun</td>
<td>434</td>
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<tr>
<td>Haridwar</td>
<td>229</td>
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<tr>
<td>Nainital</td>
<td>482</td>
</tr>
<tr>
<td>Pauri Garhwal</td>
<td>379</td>
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<tr>
<td>Pithoragarh</td>
<td>98</td>
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<tr>
<td>Rudraprayag</td>
<td>308</td>
</tr>
<tr>
<td>Tahr Garhwal</td>
<td>481</td>
</tr>
<tr>
<td>Udham Singh Nagar</td>
<td>73</td>
</tr>
<tr>
<td>Uttarkashi</td>
<td>263</td>
</tr>
</tbody>
</table>

**Construction/Upgradation Period:**
2 years

**Indicative project cost:**
INR 1 Crore (~USD 138.25 thousand)

**Development of Centre for Wellness and AYUSH Treatment (AYUSH Gram)**

The proposed project enables a patient to take holistic treatment such as Ayurveda, Panchkarma, Yoga and Naturopathy for healing. Land assistance shall be provided by the state whereas the concerned private agency shall develop and operate it.

The project is to be built in two locations, namely:

- **Project location:** Rawada Nagan Gaun, Uttarkashi
  - **Area:** 9,700 sq. metre
  - **Project timeline:** 2 years
  - **Indicative project cost:** INR 100 Crores (~USD 13.83 Mn)

- **Project location:** Kolidekh Lohaghat, Champawat
  - **Area:** 1,600 sq. metre
  - **Project timeline:** 2 years
  - **Indicative project cost:** INR 100 Crores (~USD 13.83 Mn)

**Distillation of Lemon Grass and other aromatic crops**

In Uttarakhand, Lemongrass is majorly grown in Telpura, Buggawala, Sadholi, Sikroda (Haridwar district), Badwa, Bhadogi, Bosan, Dudhai, Kotda Nahan (Dehradun), Peeda, Bebdai, Pokhal, Babina, Raisera (Pauri district), Deghat (Almora). Currently, the lemongrass is being used by pharmaceutical, fragrance, perfumery and aromatherapy industries. These industries are mainly located in Ghaziabad, Delhi, Mumbai, etc.
The suitable location for the unit would be Bhagwanpur block of Haridwar district. The approximate area for the INR 6.81 crore (USD 0.94 Mn) is 2000 Square Metre (sq. metre) with a one-year timeline.

**Project location:**
Haridwar (Bhagwanpur)

**Area:**
2,000 sq. metre

**Project timeline:**
1 year

**Indicative project cost:**
INR 6.81 Crores (~USD 0.94 Mn)

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**Value Addition and Fractionation of Japanese Mint Essential Oil**

Approximately 583 Metric Ton (MT) of Japanese mint essential oil is being produced in Udham Singh Nagar and Haridwar districts of Uttarakhand. A large number of cosmetics/ confectionary hair oil, personal care, herbal or ayurvedic, pharmaceutical industries are already established in Uttarakhand which are using Japanese mint oil and its derivatives in their products.

There is sufficient demand for Japanese mint oil-based value-added products like Menthol, Cis 3 hexanol, Pepriton, Dementholized Oil (DMO), in aromatic industries based out of Uttarakhand.

The region is rich in Japanese Mint oil covering adjoining districts of Uttar Pradesh which are very well connected to Udham Singh Nagar and Haridwar districts of Uttarakhand, but if there is need for additional quantities of Japanese mint oil, these are available in adjoining districts of Uttar Pradesh (namely Bijnor, Bareilly, Rampur, Lakhimpur Kheri, Moradabad) which are very near and well connected with Udham Singh Nagar and Haridwar. Currently, there are two known units in the organized sector (one each in Udham Singh Nagar and Haridwar). Both the projects worth over INR 17 crore (USD 2.35 Mn) have a one-year timeline and are to be built on 2000 sq. metre land.

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**Project location:**
Udham Singh Nagar

**Area:**
2,000 sq. metre

**Project timeline:**
1 year

**Indicative project cost:**
INR 17.83 Crores (~USD 2.4 Mn)

**Project location:**
Haridwar

**Area:**
2,000 sq. metre

**Project timeline:**
1 year

**Indicative project cost:**
INR 17.29 Crores (~USD 2.35 Mn)
**Aroma Tourism, Uttarakhand**

The aroma-based tourism with the basic principles of ecotourism is being conceptualized by the Centre for Aromatic Plants (CAP) (in line with spice tourism of Kerala, Goa etc.) which is to be integrated as a part of its field outreach in order to enhance the livelihoods of communities in identified clusters in the state. The identification of the location is done under a process of engaging the community members and soliciting their interest to actively participate in identification, contribution, management of the facilities and providing the guests (tourists) a unique and desired experience.

**Development of Wellness Resort at Marchula**

The proposed project is a wellness resort that provides an extensive range of treatments with world class amenities. Offering a unique blend of traditional skills and practices passed on for generations with modern high-end luxury, this project comes as a perennial choice for an enriching holiday with benefits of Ayurveda, yoga and meditation. Offering a unique experience to its guests from India and across the world, the retreat provides a perfect location. The Ayurveda centre has trained doctors and therapists who provide the right treatments and services while the Yoga centre is for practicing various postures and breathing exercises. This resort will also provide indoor and outdoor recreational activities. Marchula has serene environment with beautiful views and will be the appropriate location for the project.

<table>
<thead>
<tr>
<th><strong>Project location:</strong></th>
<th>Parsari, Bhujiaghat, Bihargarh, Peeda, Gawadi</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Area:</strong></td>
<td>4,000 sq. metre</td>
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<tr>
<td><strong>Project timeline:</strong></td>
<td>1 year</td>
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<tr>
<td><strong>Indicative project cost:</strong></td>
<td>INR 4.7 Crores (~USD 638.31 thousand) (Capital Expenses), INR 1.67 Crores (~USD 226.8 thousand) (Recurring Expenses)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Project location:</strong></th>
<th>Marchula</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Area:</strong></td>
<td>144,000 sq. metre</td>
</tr>
<tr>
<td><strong>Project timeline:</strong></td>
<td>3 years</td>
</tr>
<tr>
<td><strong>Indicative project cost:</strong></td>
<td>INR 25.6 Crores (~USD 3.48 Mn)</td>
</tr>
</tbody>
</table>
The Government of Uttarakhand has proposed to develop state-of-the-art, world-class International Wellness Centre in Rishikesh on PPP basis. The state has land available at Virbhadra, Rishikesh for this project. The integrated wellness centre is proposed to be developed on 150-acre land in Rishikesh. This centre will provide all types of AYUSH treatments and cater to the large population of nearby districts as well.

Central Government Incentives:

**CENTRAL GOVERNMENT INCENTIVES**

- National AYUSH Mission
- Central Sector Scheme for Promotion of Information, Education, and Communication (IEC) in AYUSH
- Scheme for Development of AYUSH Clusters

**STATE INCENTIVES**

- Uttarakhand AYUSH Policy:
- Uttarakhand MSME Policy:
- Uttarakhand Mega Industrial & Investment Policy 2015
- Uttarakhand Aroma Park Policy 2018
- Uttarakhand Tourism Policy 2018
- Government of India’s Industrial Development Scheme (IDS)

**GOVERNMENT INITIATIVES (STATE AND CENTRAL)**

- The National Medical and Wellness Tourism Promotion Board established to provide a dedicated framework for promotion of medical and wellness tourism.
- Collaborated with the British Broadcasting Corporation (BBC) to create a short film on medical tourism for promotional purposes.
- The Department of Commerce and Services Export Promotion Council launched a healthcare portal, [www.indiahealthcaretourism.com](http://www.indiahealthcaretourism.com) platform providing comprehensive information to medical travelers on the top healthcare institutions in the country in various languages.\(^{18}\)
• The e-tourist visa regime has been expanded to include medical visits as well.

• Scheme to promote global awareness of AYUSH systems, ‘Central Sector Scheme for Promotion of International Cooperation’.

• Memorandum of Understanding (MoU) with Sao Tome and Principe for cooperation in the field of traditional systems of medicine and homoeopathy.

• MoUs with the governments of Malaysia, Trinidad & Tobago, Hungary, Bangladesh, Nepal, Mauritius, Mongolia, Iran for cooperation in traditional medicine.

• National Digital Health Mission: Digital health ecosystem wherein every Indian citizen will have unique health IDs, digitized health records with identifiers for doctors and health facilities.

• The total budget allocation towards the Ministry of AYUSH stands at USD 9.1 Bn. Under the Ayushman Bharat scheme, 12,58,83,000 people have received benefits as on 12th March 2020.¹⁹

Supporting Infrastructure

The Government of Uttarakhand is continuously developing and upgrading the infrastructure in the state for promoting the AYUSH systems as well wellness and healthcare. Presently, the state has 546 (541 Ayurvedic and 5 Greek) state Ayurvedic and Unani clinics and houses eight medical Ayurvedic colleges.²⁰ Apart from a vast and powerful educational infrastructure which produces a strong network of skilled workforce, the state has also set up three key bodies to promote the wellness sector, namely, Herbal Research and Development Institute, Centre for Aromatic Plants and Uttarakhand Organic Commodity Board. Additionally, under the National Rural Health Mission (NRHM), AYUSH wing is being operated in 29 Community Health Centers and 154 Primary Health Centers²¹ with 206 allopathic hospitals being established under the AYUSH wing.*

The Government of Uttarakhand is making efforts to introduce the Uttarakhand Accreditation Standards for Health Care (UASH) for AYUSH systems. Under the Ayushman Bharat Yojana, wellness centres shall be identified. Additionally, the Department of AYUSH is planning to promote the concept of AYUSH Gram (village)- a concept of a place where a patient can live peacefully taking holistic treatment like Ayurveda, Panchkarma, Yoga and Naturopathy along with provision of organic food products produced in nearby fields and herbal medicines in crude form grown in AYUSH-gram herbal gardens.

Finally, the Government of Uttarakhand proposes to intervene to enhance or develop AYUSH health programmes focusing on public health care, tribal health care, palliative care, cancer care, maternity care, child care, geriatric care, sports care, communicable and non-communicable diseases and lifestyle management. Sufficient funds would be earmarked for including AYUSH programmes in health policies and programmes introduced under local bodies within the allocated budget.


¹⁹ https://www.makeinindia.com/sector/wellness
KEY BODIES FOR PROMOTION OF WELLNESS SECTOR

Herbal Research & Development Institute

The Herbal Research and Development Institute (HRDI) is a nodal agency of Uttarakhand Medicinal Plant Board. It is established for conservation, development, and sustainable utilization of the valuable medicinal plant resources of Uttarakhand. The main objective of HRDI is to coordinate with various government agencies, farmers, research institutes, NGOs, for the medicinal plant activities carried out by them.

The institute develops cultivation techniques for medicinal plants and transfers the technology to farmers. It is also involved in research on agro-technique, biodiversity, biotechnology and genetic improvement of medicinal plants.

Centre for Aromatic Plants (CAP)

Centre for Aromatic Plants (CAP) was established by Government of Uttarakhand in 2003 at industrial area Selaqui, Dehradun. CAP is a business incubator centre set up for the development of the aromatic sector. It is equipped with end-to-end facilities and support services like survey, training, research, production of quality planting material, extension, distillation, and marketing etc. It is focussed on providing facilities to farmers, entrepreneurs, researchers, buyers, distillers, perfumers, and traders, all under one roof.

CAP is working as a business incubator to support marginal farmers called Very Small Enterprises (VSEs). These farmers are availing services like technical training, quality planting materials, agro-technology, exposure visit, subsidies, and supervision. CAP is also facilitating the oil industry to link with Small and Medium-Sized Enterprises (SMEs) for business activities.

Uttarakhand Organic Commodity Board

Uttarakhand Organic Commodity Board (UOCB) functions as the nodal agency for promotion of organic farming in the state. UOCB has trained and experienced personnel for the production, quality control, marketing as well rural development. UOCB works as a service provider for different departments for the promotion of organic agriculture.

PREMIER AYURVEDA EDUCATIONAL INSTITUTES

Uttarakhand Ayurveda University

Uttarakhand Ayurveda University was established by the Government of Uttarakhand vide Uttarakhand Ayurveda University Act, 2009 for the purpose of ensuring, effective and systematic instructions, teaching, training a research and development in Ayurveda. Uttarakhand Ayurveda University was established with a view that there will be economic and scientific utilization of diversified resources available in Uttarakhand such as vivid flora and fauna and high-altitude medicinal plants and herbs.
**Uttaranchal Ayurvedic College, Dehradun**

The institute was established in 2001 for the development of Indian system of medicine. The institute provides MD (Ayurveda), Bachelor of Ayurvedic Medicine and Surgery (BAMS), Bachelor of Naturopathy & Yogic Science (BYNS), MA Yoga, PG in Yogic Science and various short-term courses. The institute also runs a 100-bed hospital with modern medical facilities, having yoga centre, physiotherapy and panchkarma units.

**Himalayan Ayurvedic Medical College & Hospital, Dehradun**

Himalayan Ayurvedic Medical College & Hospital is one of the reputed private Ayurveda colleges in Uttarakhand. The institute emerged as result of joint efforts by its patrons under the aegis of ‘Himalayiya Ayurvedic Yog Ewam Prakritik Chikitsa Sansthan’ on 16 February 2005. The college is popularly known as HAMC Rishikesh. Himalaya Ayurvedic College Rishikesh is affiliated to HNB Garhwal University and is approved by Central Council of Indian Medicines (CCIM).

**Quadra Institute of Ayurveda, Roorkee**

Quadra Institute of Ayurveda was established by Ch. Harchand Singh Atma Ram Education Trust (established in the year 2010) and is spread over 7.5 acres of green environs, conceiving the idea of nurturing Indian system of medicine in the state of Uttarakhand. Since then, the institute has projected itself as a glittering star among the galaxy of different institutes of university by providing quality education and imparting sound ethical, medical culture to the budding students. Now it is a constituent college of Uttarakhand Ayurved University, Harrawala, Dehradun, Uttarakhand. The institute is recognized by the Department of AYUSH, Government of India.

**Om Ayurvedic College and Hospital**

Om Ayurvedic Medical College Hospital & Research Center (OAMCHRC) is one of the reputed Ayurveda colleges in Haridwar, Uttarakhand. The college was founded in 1970. Om Ayurvedic College, Haridwar is affiliated to the Uttarakhand Ayurvedic Vishwavidhalaya Dehradun and approved by Central Council of Indian Medicine (CCIM).

*Central infrastructure mentioned in annexure*
Aroma, a niche sector which has seen exponential growth in the past few years, has been well recognised by Uttarakhand. The state is focused on developing Aromatic sector in a structured manner by providing adequate infrastructure, varieties of incentives, institutional support and adequate quantity of raw materials. Uttarakhand has also designated 41 acres of land parcel for Aroma Park at Kashipur. With guidance of a dedicated government body, Centre for Aromatic Plants (CAP), our association has brought together around 50 units to invest in the proposed park and harvest the benefits. Uttarakhand has vast potential for aromatics and with the industry focused approach, it will soon become a renowned hub for aromatics.

Sugandh Vypaar Sangh,
New Delhi

We have received a lot of support and encouragement from the state Government for our project in Uttarakhand. The state has also done well to implement many important reforms like single window clearance system, time bound delivery of the Government services and online monitoring of proposals for investments.

We are sure that recent investments by the Government in augmenting rail, road and air connectivity will create more avenues for investments in Uttarakhand.

Devraj Singh
Cluster General Manager - Uttarakhand and
General Manager - Taj Rishikesh Resort & Spa Uttarakhand
The Himalaya Drug Company was founded by Mr. M. Manal in the year 1930 in Dehra Dun. Himalaya is a partnership firm and Mr. Meraj A. Manal son of the founder Chairman Mr. M. Manal is Chairman, Mr. Nabeel Manal is Vice Chairman, Mr. Shailendra Malhotra is CEO, Mrs. Jayashreeullal is CFO & COO and now Head Office of the company is in Bangalore.

The Himalaya Drug Company has not faced any problem in Dehra Dun from the Department of Industries or Labour. The company has no labour problem, unrest or lock-down since its inception and the company is maintaining harmonious relations with its employees. The Himalaya Drug Company had a humble start and now is a 2000+ crore company with 50 per cent exports to above 100 countries. For Dehradun Unit Dr. S. Farooq is President, Mr. G. P. Pant is Dy. Manager, Dr. Zafar Mahmood is Sr. Manager QA, Mr. A. K. Dixit is Manager QC. The company appreciates the cooperation of Department of Industries who have helped us in every way.

Dr. S. Farooq
M.sc., Ph. D. (Gold Medalist)
Dehradun, India
The state of Uttarakhand is reimagining its investment landscape and developing new opportunities for interested players. There are a range of exciting incentives and support mechanisms being implemented by the government from transparent tax policies and swift project approvals to cost effective operational setups.

There are also a large number of engineering and management institutes including Indian Institute of Technologys (IITs) and Indian Institute of Managements (IIMs) present in Uttarakhand. This focus of the government for the upskilling of human resources in the state is a crucial factor in determining and promoting its investment feasibility. There are also numerous Ayurveda institutes and AYUSH training centers present in the state, which cater specifically to alternative health and wellness services.

Uttarakhand is well connected by rail, road and air to the metropolitan city, Delhi-NCR which makes it a viable and attractive investment destination for interested market players.

Ease of Doing Business is also a priority for the government of Uttarakhand and to this end, a web based Single Window Clearance System has been implemented - www.investuttarakhand.com. This one stop clearance system allows investors to access all necessary state government approvals to establish and start their business operations with ease and without any physical interactions with the approving and licensing authorities. Creating a more technology friendly ecosystem for investors, Uttarakhand is also consolidating its traditional industries and encouraging new avenues of growth, especially in the wellness and healthcare sector.
ANNEXURE:

Agencies:

- Ministry of AYUSH
- National Medicinal Plants Board
- Ayurvedic Drug Manufacturers Association
- National Centre for Complementary and Alternative Medicines
- Pharmaceuticals Export Promotion Council of India

Regulatory Bodies:

- Central Council of Indian Medicine
- Central Council of Homoeopathy

Research Councils:

- Central Council for Research in Ayurvedic Sciences
- Central Council for Research in Unani Medicine
- Central Council for Research in Siddha
- Central Council for Research in Homeopathy