

Product launch Strategy for Ayurvedic products post-pandemic- A Roadmap for European markets

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Abstract

As per recent report (Global Ayurvedic Market 2019) published by Industry research, raising awareness with respect to a very healthy lifestyle and increasing preference for herbal or chemical-free products have led to the expansion of the Ayurveda market, that too globally. The market was valued at US\$4.5 Billion in 2017 and is expected to reach the US \$ 14.9 Billion by 2026 at a CAGR of 16.14%. The global market for complementary and alternative medicine products is forecasted to grow at a CAGR of 18.2% until 2024. The European pharmaceutical market is expected to grow at about 3% per annum.

This trend is projected in the coming years and will create opportunities for Ayurvedic product manufacturers. There are several reasons which account for this projected latitude- natural ingredients and mixtures used in nutraceuticals, supplements and natural remedies are not grown in Europe. For a product like a turmeric that is not grown in Europe, South Asian suppliers can take this opportunity and use it for their benefit. There are many such botanical and essential oils that are used in Ayurveda which cannot be found there.

Several Europeans, especially the elderly population are rapidly incorporating nutritional supplements in their respective diet in the hope to reduce the negative impact of the chemicals. The lack of availability of these products during these unprecedented times in foreign markets needs a quick eye of the industry's key players. The belief of consumers has had a shift from "lifestyle up-gradation" to "precaution and prevention".

This research focuses on and identifies the need for Ayurvedic products across cultures in the European market in the current times (January 2021). The paper provides a suggestive roadmap for the launch of a new product in the European market and sustainable strategies to ensure competitive advantage. Risk mitigation strategies with a long term aim have also been discussed.

Keywords- ayurvedic, nutraceuticals, pharmaceutical market, new product, competitive advantage.

Introduction

Covid-19 pandemic has added to the already existing popularity of Ayurvedic products not only in India but also in foreign markets. In a thorough survey conducted by market research publisher QY Research in the July 2020, it was found that the global Ayurvedic products

market size will reach \$5,172.7 million by 2026 (from \$4571.7 million in 2020) growing at a CAGR of 12.0% during 2021-2026.

The earlier notion of it being perceived as a pharmaceutical solution to specific problems has now been replaced with it being focused on proactive & holistic health. It suggests a complete balanced lifestyle to prevent solutions rather than focus on curing problems. Covid-19 pandemic has made people more aware of staying proactively healthy to prevent any form of illness. Ayurvedic products cater to such needs and are a definite answer to such an approach.

Before the Covid 19 outbreak in the world, the ayurvedic market typically witnessed 15-20% annual growth. However in the last quarter, several big and small companies have witnessed a 50-90% of annual growth, as quoted by Mr Vaidya Rajesh Kotecha, Secretary, Ministry of Ayush, (Ayurveda, Yoga & Naturopathy, Unani, Siddha and Homeopathy) Govt. of India. It is totally suggestive of the fact that the adoption of Ayurveda as a holistic & natural healthcare solution will definitely lead to a positive impact on this industry.

Ayurvedic products have surely made their way clear into the western market due to their comprehensive approach towards mental, emotional, physical and spiritual well-being. Many factors have propelled the Ayurvedic market growth. A report by Market research Future (MRFR) 2020, discusses some of these important factors. Some of them being- increased awareness of the efficacy and effectiveness of traditional medicines, disenchantment with allopathic medicines and their side effects. Several other factors are also noteworthy like increasingly aware consumers and a spurt of incidents of chronic illnesses like an allergy. It has also been highlighted that the ayurvedic market in Europe is predicted to have promising growth in the coming years. Germany, Italy and France are key contributors to this region.

The rationale for choosing these markets-

According to the Ayurveda Market Research Report – Forecast to 2023, the market for Ayurveda is predicted to grow at a promising pace in Europe for over the forecast period (2018-2023). The report mentioned Germany as one of the key contributors to the growth in this region. It highlighted multiple factors like high disposable incomes of the people in this particular region, growing popularity for Ayurveda and availability of large scale facilities as the reasons for the same. The reference for the same has been found in previous studies as well (Rosenberg, 2010). The paper mentioned Italy and UK markets in addition to Germany as key supporters for Ayurvedic medicine education. Besides this, the UK market seemed an interesting area to explore due to the event/deal of Brexit. Hence this paper attempted to look into these two markets for the launch of an ayurvedic brand.

Research Structure

This research has been designed in three stages-in the initial part an extensive literature review that was conducted with an objective to identify the determinants of a successful product launch. In the second part, a preliminary investigation was done to explore the possible factors which impact consumer's preference in the European market. In the later stage, quantitative research was done and specific recommendations have been proposed to the marketing

specialists. The findings of this study will definitely help the Ayurveda product manufacturers to align with the European consumer market for wider acceptability.

Literature Review

Banerjee (2004) This article talks about the first external encounter that defined modern ayurvedic pharmaceuticals in the twentieth century and significant new government policies and initiatives in the UK, US and European Union in the past 20 years or so that have shaped the terms of export of ayurvedic products/medicines. The conclusion attempts to locate the role for the agency in this seemingly irreversible process of structural transformation by listing the responses of civil society - practitioners, industry and grassroots organisations.

Ledwith and O'Dwyer (2008) The researcher here aims to examine the intense impact of product launch, product advantage as well as the market orientation on new product development performance and organisational performance in SMEs. The study has identified several significant differences between the impact of product launch, product advantage as well as market orientation on new product development and organisational performance in the small and large firms and industries. The report has also indicated several areas in which small firms can improve their new product and organisational performance. However, This research builds onto the prior empirical research that has established a positive link between the customer and competitor orientation and performance of small firms.

Lehtimäki, Salo and Karjaluo (2008) This study claims that the research studies the key drivers and challenges of launch, be it the launch of an industrial product generation and the launch development activities and launch management. The researcher suggests that it is hard to excel in launch if it is not managed and developed as a holistic cross-functional process and before focusing on fine-tuning the integration of strategic and tactical launch decisions in young and growing organisations, basics should be handled first. However, The main limitation of the study relates to the single case study approach which makes generalisations of the context-specific results difficult.

Brentani, Kleinschmidt and Salomo (2010): The researcher here attempts to shed lights on the expanding and adapting NPD parameters and boundaries in terms of what is relevant for globalization in the current scenario. Further, the research focuses on the performance effect of strategies relevant to driving global new product programs. Further, it concludes, To succeed in global markets, companies need to develop the strategies that incorporate the right degree of globalization in terms of both market coverage and product offering. The results have led to several contributions and managerial implications.

Arya and Thakur (2012) This research studies and claims the consumer behaviour in consuming/purchasing Ayurvedic medicines or the products and their changing attitudes toward herbal medicines in the Joginder Nagar region of Himachal Pradesh, India. The data has been predominantly compiled by face to face conversation, based on the questionnaire, with a sample of 500 consumers at distinct places of Joginder Nagar. The researcher here concludes that the people of Joginder Nagar are more interested in the Ayurvedic OTC

products when they are compared to the product/medicine recommended by Physicians. Hence, scientific knowledge of the Ayurvedic/herbal drugs has to be transmitted out in a systematic manner to compete in the international market and provide a complete consumer satisfaction.

Kumar, Jain, Rahman and Jain (2013) Authors focused on the marketing of spirituality and its impact on customers. They studied the companies that have done marketing through spirituality. Ayurvedic products only have made an impact on FMCG markets like Patanjali. Here in this research paper yoga is considered as the dimension of spirituality. Through this, Patanjali has launched several products in FMCG markets and those products are quite successful in FMCG markets because of marketing through spirituality.

The strategy of spirituality may or may not be effective for every country in terms of new product launches in Europe.

Fan and Tan (2015) This research introduces two very critically important dimensions of product attributes in the context of internationalization: First one is domain specificity and other one is culture-specificity. By examining four cases, the researcher shows that different product attributes affected the difficulty or ease with which the products of these firms were internationalized. simply enter. In general, more culture-specific products face higher hurdles to be systematically sold in order in a culturally different or dynamic international market compared with the home market. However, given products of similar culture-specificity, and highly domain-specific products tend to have very less difficulty in selling to a culturally different internationally.

Choudhary (2016) In this article the author draws evidence from the FMCG market and identifies the segments in this particular market where the herbal/ayurvedic brands are doing well. The reasons for the growth of these brands are discussed along with some statistical analysis. This article also talks about the emergence and growth of ayurvedic/herbal brands in the FMCG market. The market trends and analysis carried out in this paper show that Ayurvedic/ Herbal brands are capturing the ground at a fast pace in the Indian FMCG market. Growing consumer consciousness and the availability of natural substitutes has facilitated this shift. So, this trend of growth of ayurvedic/herbal brands seems to be irreversible, at least as of now.

Mehta (2017) In this paper, the researcher has studied that the demand for ayurvedic products is rapidly rising in FMCG markets and this is giving a tough time to other global FMCG products. There is a brand war between Patanjali and global companies in the FMCG market. High demand for ayurvedic products might cause a monopoly in the future market.

Verma (2018) Here, the researcher has studied the Critical Success Factors for Ayurvedic and Herbal Product Launch. As we know that the Indian FMCG market has witnessed a big transformation in terms of changed product share and market share of long-existing multinational brands.

Results have clearly supported the existing literature as all the hypotheses were found extremely significant and true. Hence, this study also establishes the importance of product-

related factors (Product Quality, Product Benefits, Product Assortment, Packaging), Price, Promotion and Brand Image. Spirituality also becomes an important predictor of the successful launch of Ayurveda and herbal products as people tend to associate themselves with it.

Laddha, Chandak and Darda (2019) In their paper, highlights the companies which has contributed to the development of Ayurvedic products in the market line of FMCG. The authors aim at the concept and need of ayurvedic products in the FMCG market and the challenges faced by ayurvedic products in the FMCG market. It is suggested by the authors that FMCG companies have helped the industry to bring new products in every possible way. This has increased the growth of the market and also helped the consumer to get connected to their products.

Sharma, Gulati, Pandey, Gautam (2019) According to the authors and their research, the ayurvedic products have played a key trend participant in FMCG markets. These products are now becoming fast-moving consumer goods. With the increasing demand for ayurvedic products in FMCG markets, many companies like Patanjali, Dabur etc. are interested in expanding the market.

Ruiz (2020) The researcher aims to critically analyse the global product launch experiences of two firms, highlighting the unique challenges in each target country and how these challenges influence the global product launch process and strategy, such influences prevent the effective use of standard mass-marketing processes. In conclusion, factors that influence the success of a global product launch are- cultural mores, channel parameters, technology infrastructure and language and colloquialisms, which require a certain level of customization in order to reach the target market and ensure positive product performance after the launch process. Additionally, in order to succeed in the global market, companies must properly understand the difference between the markets they are targeting.

Gupta (2020) This article talks about all sectors being covered under the Ayurveda and the psychological and social impact on the group of people using these products. The researcher has framed this work using the Doctrinal Method of the research. The researcher has found that Ayurveda has been widely accepted as a complementary medicine internationally. Many of the small companies have grown rapidly in the past few years and have led to an increase in the market share of the ayurvedic industry in the economic market and has also helped in increasing the economic growth of the nation.

Sen and Chakraborty (2020) This article helps the researcher in getting the clear understanding and providing proper information about the globalisation of Ayurveda. Also, this article explains a lot about the problems associated with Ayurveda. The article suggests, internationally, the scope of Ayurveda is huge and has the potential to benefit a range of beneficiaries. In order to achieve this, the scientific evidence base of Ayurveda must be very strong.

Research Objectives-

- To conduct a preliminary investigation for the launch of Ayurvedic products in European markets by using Germany and the UK as the units for analysis.
- To suggest a tentative roadmap for their entry into these markets and product launch

Research Methodology-

This paper reports a preliminary investigation conducted into the need and launch of ayurvedic products in Germany and UK markets. The key insights were taken from the online focus group interviews which were conducted for the respondents who were residing in these countries and were aware of the potential of ayurvedic products. Kite and Phongsavan (2017), found that the efficiency of online focus groups to generate data was at par with the physical focus groups conducted face to face. This finding further strengthens the confidence of the researchers in using the technique. Then a series of questions exploring the need, availability, perception of the people and the scope for ayurvedic products were designed and floated as themes to propel the focus group discussion. The interviews were recorded and transcripts were produced. The emerging themes were further explored through in-depth interviews conducted for the very purpose.

The respondents from the focus groups who were willing to participate were moved to this step of research. Laddering, a powerful technique of research (Veludo-de-Oliveira et al., 2006) was used to further propagate a thread of thought or statement as expressed by the respondent. Each interview spanned for a period of 25- 40 minutes and was allowed to follow a natural flow of conversation. After fourteen interviews, it was found that there existed no novelty in the information obtained and hence the process was brought to closure. The data filtered out of the process was used for further analysis.

Research Findings and Discussion

Focus group discussion is a method whereby a researcher gathers a group of individuals and discusses a specific topic. The primary objective is to gain insights from their personal experiences, beliefs, perceptions and attitudes. It is a moderated interaction that follows the integration of both structured and unstructured questions (Johnson, 1996). The primary reason for conducting focus group discussion is to indulge participants in brainstorming which might lead to sharing of several opinions and enables the researcher to dig deeper into an issue (Kitzinger, 1994) and (Morgan, 1995).

A Qualitative method of data collection was applied to collect data and explain the various factors and components which are of relevance with respect to an ayurvedic product. The researchers conducted an online focus group discussion to obtain a comprehensive view in

understanding the components of the marketing mix for an ayurvedic product launch in the European market.

The participant's demographic details are provided below-

Table 1.1

Sl. No	Participants/Respondents(R)	Gender(M/F)	Age (Years)
1.	R1	Female	21-30
2.	R2	Male	21-30
3.	R3	Male	21-30
4.	R4	Male	21-30
5.	R5	Female	21-30
6.	R6	Male	31-40
7.	R7	Female	31-40
8.	R8	Female	31-40
9.	R9	Female	21-30
10.	R10	Male	21-30
11.	R11	Female	31-40
12.	R12	Female	21-30
13.	R13	Male	31-40
14.	R14	female	21-30

To conduct a focus group discussion, a pre mailer was sent to 35 participants asking for their consent to record the online discussion. It was however declined by some and only 14 agreed for the same. Two focus group discussions were conducted in the first and second half of the same day. Each group consisted of German and UK natives. It was taken care that the selected participants were aware of the ayurvedic products available in their market and had used them at least once.

In order to encourage free communication, a brief introduction was done by the researcher and salient features of the topic 'Considerations while purchasing ayurvedic products' was discussed with them.

The open-ended questions which facilitated the focus group discussion are as follows:

1. Do you believe in the effectiveness of ayurvedic products more than chemical ones?
2. Any particular category of ayurvedic products which you prefer buying?
3. What kind of marketing materials/campaigns attract you to a new ayurvedic product?
4. Do you consider the packaging of a product before buying it?
5. What is the average price you are willing to pay for these products?
6. When you buy from a retail store, do you make impulse purchases?
7. Do you check reviews through social media before buying any ayurvedic product?
8. Any medical specifications/certifications you look for when buying ayurvedic products?

Product specifications

The participants from both Germany and the UK were of the opinion that they preferred the personal care product category when buying ayurvedic products. During the interaction, it was also reflected that the efficiency of the product should be reflected by its packaging. Also, certain medical certifications were highlighted during the discussion.

R1- *“ I feel..um..when I go to a supermarket I look for.. an ayurvedic product mostly which is certified by some ...medical association.*

R2- *“Well I prefer recommendations by the German medical council ..maybe”*

The group was encouraged to participate very freely in the discussions at all points in time and to consider the questions from their personal experience and answer them. The moderator intervened only when the discussion was deviating from answering focus group questions or to encourage shy participants to fully participate in the discussion wherever it was needed.

Price ranges

When asked about the average pricing they are willing to pay for these ayurvedic products, a difference in the two groups was noticed, mainly due to the dissimilarity in the living standards of the two nations. Most of the German participants of the focus group explicitly stated that they mostly prefer buying low-cost products.

R3- *“To begin with ...um..i always pick up the less expensive one..maybe..u know..I feel .let me try it once ..”*

R5- *“ Yes..if no side effects and if I like it..then ..u know..why not..buy again”*

The discussion indicated a distinct viewpoint on price considerations.

Promotional campaigns

The questions related to preferred marketing campaigns/materials were deliberately left broad and open-ended to increase the likelihood of emergent ideas being captured. Participants from both groups highlighted that they do consider mostly TVC's and social influencers when buying an ayurvedic product. The entire discussion was actively voiced by all the participants and the moderator facilitated open communication for better information sharing. Hence, a preference for free samples and trial packs was observed.

R4- *“I say. Why not give some free samples to us..”*

R6- *“Yes..even I like small sachets ..If I find them beneficial, I might as well buy it”*

R2- *“There are lot of benefits of getting these small packets..you don't have to bother a lot about the reviews..just use it and experience it for yourself”*

Distribution channels

The participants in both countries revealed that there exist a plethora of distribution channels ranging from a pharmacy, speciality stores to beauty salons, online channels etc. for the purpose of purchasing ayurvedic products. It seemed as if no consensus regarding a particular distribution channel could be reached.

R7- *“buy from where? Ha ha, that's good to ask .”*

R1- *“lemme think.... The last time bought from my salon”*

R2- *“definitely would like to buy from a departmental store and check the details on the package myself ”*

Deeper insights from the interviews-

1. The major motivation of the customers for buying ayurvedic products was the fact that they are free from chemicals. Further probe revealed the negative connotation attached to the chemicals that can be found in commercial formulations. Hence people had a strong believe that ayurvedic products are most of the times free from chemicals
2. Free from side effects- in-depth interviews revealed that the ayurvedic products were thought to be made of natural ingredients and hence were perceived as being free from the side effects.
3. Trust was found to be more ingrained in the demographically older and mature respondents and even the respondents who were below the age of 25 also confirmed that the belief in Ayurveda has deeper roots with their parents or grandparents as compared to them.
4. Respondents also admitted that the use of ayurvedic products has increased during a pandemic. This finding is as per the expectation of the researchers and was highlighted by this research
5. Personal care products were found to be the most commonly used ayurvedic products. Further investigation revealed that the ayurvedic formulations for hair care were even better perceived and placed in the said category in the case of the UK.
6. Respondents were aware of the certifications given by the government in these countries but they had more faith in the brands. They further revealed that they prefer to buy ayurvedic products of reputed brands. Brands like- Mauli supreme, Urban Veda, Kerala Ayurveda, Champo, Maharishi Ayurveda and Dabur got a quick recall from the respondents in the UK. For Germany, Kama Ayurveda, lavera, Dabur, eco cosmetics, Sri Sri brand etc It is important to note that many brands from the above-mentioned ones belonged to India.
7. Respondents also discussed that the price of ayurvedic products was higher as compared to their non- ayurvedic counterparts. They also admitted that due to this factor they were quite cautious while using the products (small quantity at one time). German participants were more concerned about the price while buying ayurvedic formulations.
8. It looked as if respondents did not pay much attention to a particular distribution channel while buying ayurvedic personal care products. They cared more about the details written on the packaging and once the brand gained trust with them, they went forward to just buy it.

Conclusion

In Conclusion, the study highlights the preliminary investigation for the launch of Ayurvedic products in European markets by using Germany and the UK as the units for analysis. In order to attain success in such markets , the brand must be positioned in such a way that it indicates it's freedom from the chemicals and side effects. Pandemic has led to a positive stimulus generation amongst the residents of these countries and thus inclination was found towards the use of the Ayurvedic products. The pull was more towards the personal care category as compared to any other category. Therefore , the road towards such a category is clear for the

launch. It was found that the population was quite aware of the certifications and they had more faith established in such brands. Thus, a good customization in packaging is suggested to ensure positive product performance after the launch process. Low price points as well as great quality are also the key player in global launch strategy. Additionally, in order to attain success in the global market, companies must properly understand the difference between the markets they are targeting, as some launching tactics may be effective in the developed market but may have counter-effective impacts on product performance in emerging markets. For example, pricing strategies and preannouncement tactics need to be customized depending on the region of the world companies are planning to launch a product.

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