



Traditional Medicine in South Africa: Prospects for Ayush

South Africa is the second-largest economy on the African continent and remains India's second-largest Sub-Saharan trading partner¹. India and South Africa also share a rich history of use of traditional medicines in healthcare delivery. Ayush systems are also recognised practices in South Africa, often driven by the presence of the Indian diaspora. These complementarities along with robust trade partnerships between the two countries, have created a substantial space for bilateral cooperation in the traditional medicine sector. South Africa is already an important region for Ayush exports. The value of Ayush exports to South Africa was USD 16.47 million, constituting the largest share (22.07 per cent) of Ayush exports to Africa (USD 74.58 million) in 2023. This policy brief aims to highlight South Africa's regulatory profile of Traditional and Complementary Medicines, key components of Ayush trade with South Africa and prospects for growth and collaboration between India and South Africa.

Country Profile

Epidemiology and pharmaceutical market profile

As with other middle-income countries, there is a growing non-communicable diseases (NCD) burden in South Africa. The evolving demographic and epidemiological profile has been providing opportunities for pharmaceutical companies, particularly those producing non-communicable disease treatments.² India has a visible presence in pharmaceutical imports in South Africa. South Africa imported 29.05 per cent of all its pharmaceuticals (under HS Chapter 30) from India in 2023, followed by Germany (10.43 per cent) and Belgium (10.29 per cent). A government initiative to support the domestic industry places pharmaceutical manufacturing units with a local presence at an advantage. Some Indian firms like Cipla³, Sun Pharma⁴ and Lupin⁵ have adopted market entry strategies by setting up units in South Africa to counter this competitive advantage enjoyed by local drug makers.

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- 1 India - South Africa Bilateral Economic Engagement. Consulate General of India. <https://www.cgijoburg.gov.in/india-south-africa-bilateral-economic-engagement.php>
- 2 India - South Africa Bilateral Economic Engagement. Consulate General of India. <https://www.cgijoburg.gov.in/india-south-africa-bilateral-economic-engagement.php>
- 3 Pharmaceuticals Export Promotion Council of India (Set up by Ministry of Commerce & Industry, Government of India) REGULATORY & MARKET PROFILE OF SOUTH AFRICA, 2018
- 4 Cipla. <https://www.cipla.co.za/>
- 5 Sunpharma. <https://sunpharma.com/south-africa/>
- 5 Lupin. <https://www.lupin.com/lupinsubsidiaryin-south-africa-announces-commercial-agreement-with-creso-pharma-for-hemp-oil-based-cannaqix/>
- 6 Institutionalisation of African traditional medicine in South Africa: Healing powers of the law? Christa Rautenbachs based on a paper delivered by the author at the 7th Greek Conference “Facing change in law, medicine and science: Rights, justice and the individual” held at Corfu from 26 September to 2 October 2009

Traditional health practices and alternative/complementary medicine practices

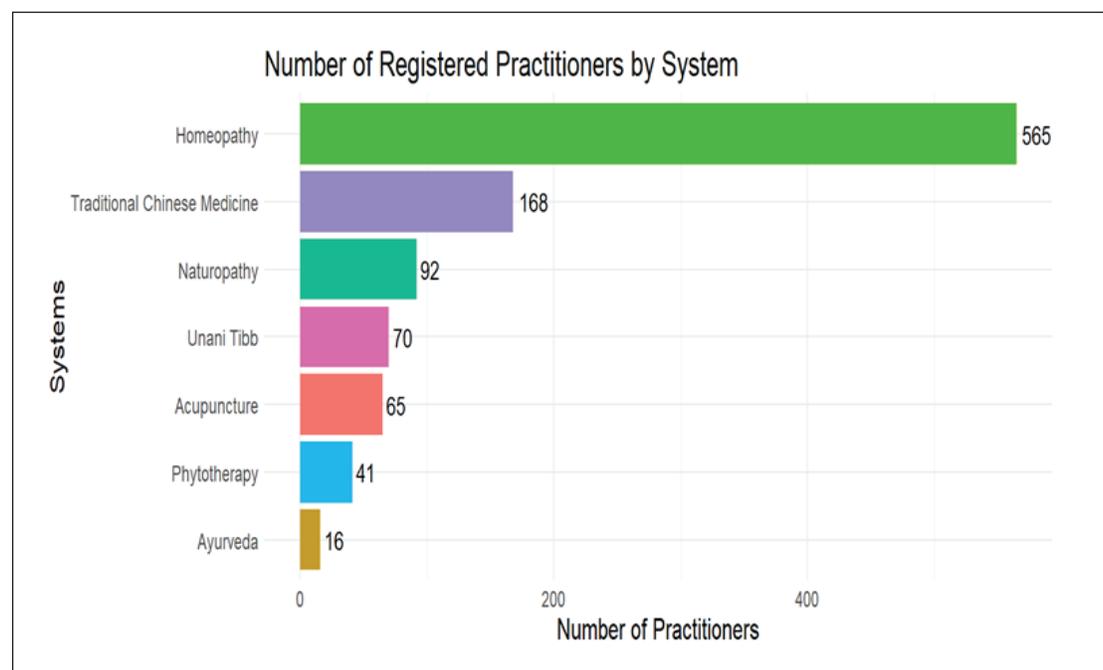
The assistance of the traditional healers has been embedded in the health-seeking practice of South Africa. There are roughly 200,000 practitioners of traditional medicine in South Africa.⁶ Gqalenii *et al.* (2007) estimate 185,477 traditional health practitioners (THPs) in South Africa are affiliated with approximately 100 organisations. Besides the role of THPs, the use of other traditional and alternatives medical practices is also prevalent. According to estimates from the Allied Health Professions Council of South Africa (AHPCSA, 2010), 1–19 per cent of the population uses Traditional and Complementary Medicines (T&CM) practices, including acupuncture, ayurvedic medicine, chiropractic, herbal medicines, homoeopathy, naturopathy,

osteopathy, traditional Chinese medicine, unani medicine and other practices. The growing wellness movement globally is also attracting consumers towards complementary medicine systems in South Africa.

India’s Ayush Trade with South Africa: Trends and Patterns

The hallmark of India’s Ayush exports to South Africa is that it has been catching up in line with the vertical value chain process, and the herbal pharmaceutical segment will steer the export performance of Ayush in the coming years. There are a variety of products that constitute the Ayush export basket, ranging from drugs, herbs, extracts, cosmetics and nutraceuticals. Some products from HS Chapters 12, 13, and 30 can be analysed. The exports of these Ayush products show an increasing trend in the quantum of exports. Ayush products are also

Figure 1: Registered Complementary Medicine Practitioners in South Africa



Source: Allied Health Professions Council of South Africa, 2014.⁷

consumed in the form of nutraceuticals, food supplements, spices, and cosmetics, and they are available via HS chapters 21, 29, etc. However, it is difficult to separate Ayush components from those Chapters due to the unavailability of the codes. Hence, the present estimate may understate India's actual exports of Ayush products to South Africa.

Ayush Exports to Africa: Proportion of Exports to South Africa

India's total global export of Ayush was USD 1.02 billion in 2023. Exports to Africa were USD 74.58 million in the same year, accounting for 7.3 per cent of India's global exports. However, the sectoral distribution shows a dominance of Ayush pharmaceuticals exports to Africa. Ayush medicants and medicaments exports to Africa constituted 18.73 per cent of India's global Ayush pharmaceuticals exports in 2023. MAPs exports were 7.89 per cent of global exports, while extract exports to Africa is negligible at 0.61 per cent. Ayush pharmaceuticals also dominated the total Ayush exports to Africa in 2023 (50.44 per cent), although MAPs closely followed with 46.06 per cent. Extracts constitute a small proportion at 3.50 per cent of all Ayush exports to Africa in 2023. With South Africa, India enjoys a dynamic trade constituting both exports and imports, although it tilts towards a trade surplus in India's favour. South Africa constituted the largest share of exports (22.07 per cent) to Africa in 2023. Between 2017-2023, exports to South Africa have grown by a CAGR of 11.26 per cent.

Composition of Ayush Export Basket to South Africa: Surging Pharmaceutical Exports

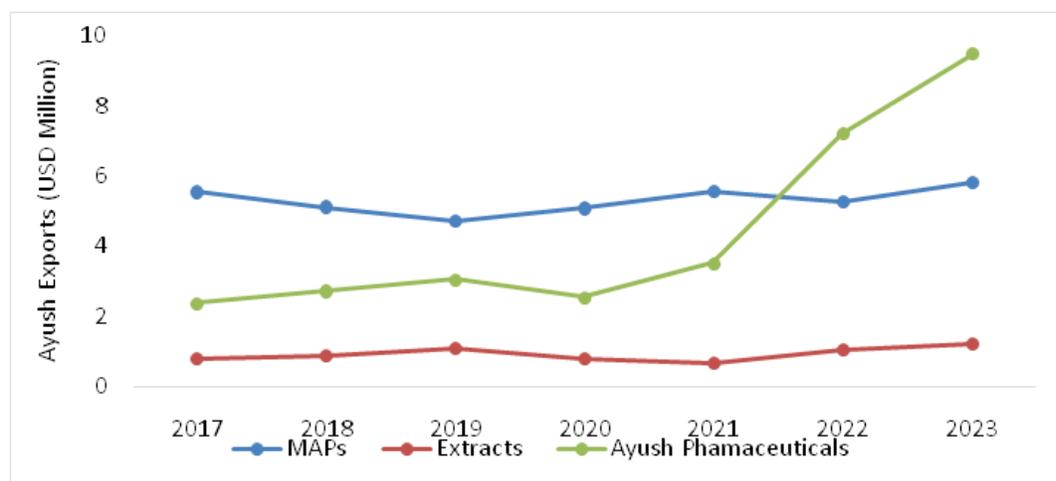
As seen in Figure 2, growth in Ayush exports to South Africa has been consistent across all components and across the timeline studied. This includes the abnormal years of the COVID-19 pandemic. Ayush pharmaceuticals contributed 57.44 per cent of all Ayush exports in 2023. Medicinal plants are also an important sub-sector of Ayush exports. MAPs exports constituted 35.22 per cent of Ayush exports to South Africa in 2023, followed by extracts at 7.35 per cent. However, the growth of MAPs exports has been 0.80 per cent between 2017 -2023. In comparison, Ayush pharmaceuticals have shown the highest CAGR of 25.95 per cent. The share of extracts did fall in 2021 but it regained its growth in 2021, and has grown at a CAGR of 7.35 per cent between 2017-23. It may be inferred that India's exports are towards the higher end of the value chain, constituting more of finished goods and less of raw materials.

Trends in Ayush Pharmaceuticals exports

In 2023, Ayurveda dominates the total Ayush pharmaceuticals exports to Africa accounting for 96.89 percent, followed by Homoeopathy and Unani medicines. A similar trend was seen in the case of South Africa, where Ayurvedic medicine accounts for nearly 99 percent of India's total AYUSH exports. However, Unani medicines exports have increased with CAGR of 15.16 per cent between 2017 and 2023. Manufacturers of Unani, and Homeopathy medicines could

7 Allied Health Professions Council of South Africa, 2014. Available at https://www.compcom.co.za/wp-content/uploads/2020/03/ahpcs_a_competition_commission.pdf.

Figure 2: Total Ayush Exports to South Africa (in USD Million)



Source: Authors' compilation based on Directorate General of Commercial Intelligence and Statistics (DGCI&S).

explore strategic marketing opportunities to capitalize on the significant growth potential of these products in the South African market.

India's MAP Trade with South Africa: Growing Imports

India enjoys a dynamic trade in MAPs with South Africa. In 2023 it exported USD 5.8 million worth of MAPs to South Africa. Exports have grown at a CAGR of 0.80 per cent between 2017-2023. MAPs are the dominant sub-sector in imports, constituting more than 97 per cent of imports in 2023, the rest being followed by extracts. At present, imports of MAPs from South Africa are

minimal in comparison to total imports from the African region (1.62 per cent in 2023). However, imports of MAPs from South Africa have grown at a CAGR of 9.39 per cent between 2017 to 2023. Hence, even as India enjoys a trade surplus in MAPs, the growing imports highlight that the Imports are often under different HS chapters in their respective 'others' categories; hence, there is a lack of clarity in assessing the types of MAPs imported.

In 2023, South Africa's total exports of plant parts under HS-1211 reached USD 13.48 million, up from USD 5.32 million in 2013 (Figure 3), with a 9.74 per cent CAGR. On the other hand, imports

Table 1: Ayush Pharmaceuticals Export to South Africa (in USD million)

Systems	2017	2019	2021	2023
Ayurveda	2.33	2.62	2.97	2.44
Unani	0.03	0.09	0.03	0.05
Siddha	0	0	0	0
Homoeopathy	0.01	0.01	0.03	0.03

Source: Authors' compilation based on Directorate General of Commercial Intelligence and Statistics (DGCI&S).

of these plant parts amounted to USD 3.75 million, an increase from USD 3.06 million with a CAGR of 2.05 per cent.

Regulation of Traditional and Complementary Medicine (T&CM) in South Africa: Authorisation and Sale of Goods and Services

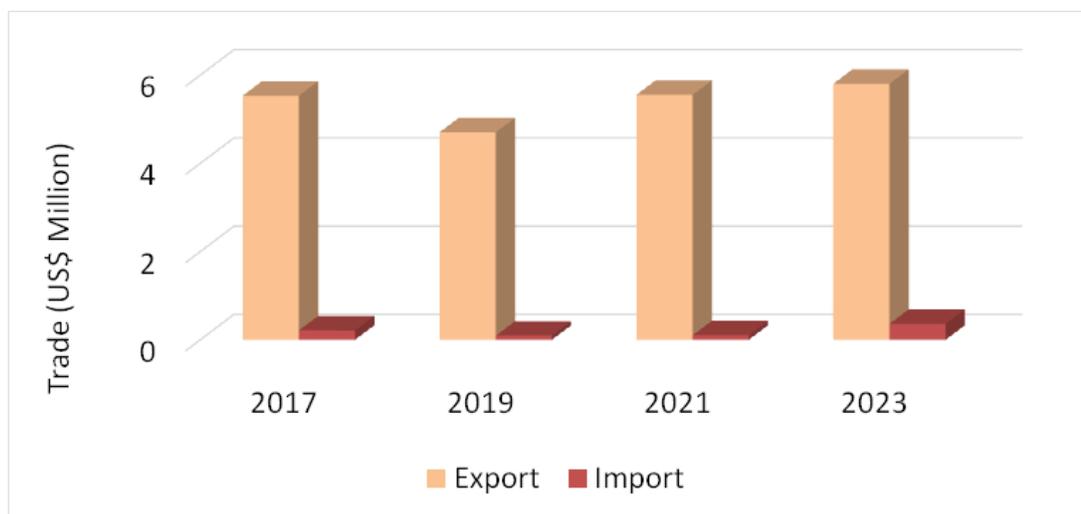
South Africa’s regulation on T&CM is partly the same as that of modern pharmaceuticals. However, the regulatory landscape is fast evolving with clear guidelines for complementary medicines. T&CM medicine is now a category specifically regulated under the South African Health Products Regulatory Authority (SAHPRA) to be registered with and evaluated by the SAPHRA. The Medicines and Related Substance Act, 1965 (Act 101 of 1965) (referred to as “General Regulations”), was amended in 2013 to establish a new category (D), i.e. Complementary Medicines. The medicines which fall under this definition include ‘Aromatherapy, Ayurveda, Homeopathy, Traditional Chinese

Medicine, Unani Tibb and Western Herbal Medicine”⁸, as well as combination products. The guideline for registration of Complementary Medicines (Quality, Safety and Efficacy) that was brought out first in 2011 has seen subsequent revisions, the latest one being published in 2020.⁹ Based on the system of medicine, WHO monographs on selected medicinal plants, the German pharmacopoeia, the Chinese pharmacopoeia, the Ayurveda pharmacopoeia of India, the Unani pharmacopoeia of India, and the EU’s European pharmacopoeia are permitted to be used as reference.¹⁰ The GMP regulations for conventional pharmaceuticals also apply to Complementary medicines.

The national law on Complementary medicine practice is titled Chiropractors, Homeopaths and Allied Health Service Professions Second Amendment Act of 1982¹¹. Practitioners of T&CM practices are regulated under this law. The Allied Health Professions Council of South Africa (AHPCSA), a statutory body, issues the licence required to practise.

- 8 South African Health Products Regulatory Council. <https://www.sahpra.org.za/complementary-medicines/>
- 9 Complementary Medicines - Discipline-Specific Safety and Efficacy. 2020. South African Health Products Regulatory Authority. Available at https://www.sahpra.org.za/wp-content/uploads/2020/04/7.01_CM_s_SE_DS_Jan2020_v3_1..pdf
- 10 African Health Products Regulatory Authority. <https://www.sahpra.org.za/complementary-medicines/>

Figure 3: MAPs Trade Between India and South Africa



Source: Authors’ compilation based on Directorate General of Commercial Intelligence and Statistics (DGCIS).

11 Chiropractors, Homeopaths and Allied Health Service Professions Second Amendmenk Act, 2000. Available at <https://www.gov.za/documents/chiropractors-homeopaths-and-allied-health-service-professions-second-amendment-act>

12 Registration and Licensing Requirements → Regulatory Authority : South African Health Products Regulatory Authority (SAHPRA) → Website of regulatory Authority : <http://www.mccza.com/>

13 Traditional Medicine and Iwt in Southern Africa: A Roaring Trade?.2019. The oxford Martine Prohramme on Wildlife Trade. <https://www.illegalwildlifetrade.net/2019/04/08/traditional-medicine-and-iwt-in-southern-africa-a-roaring-trade/>

Medicinal Plants Sector in South Africa: Prospects for Trade with India

Currently, more than 2100 South African plant species are used for traditional medicine, of which a third are regularly traded in markets¹³. For India, it may be of interest to consider the commonly traded medicinal plants in both countries. As the Ayush industry grapples with challenges in the supply of medicinal plants, it may consider exploring possibilities of sourcing medicinal plants from South Africa. Table 2 lists some medicinal plants traded in both India and South Africa.

Prospects for Ayush: Way Forward

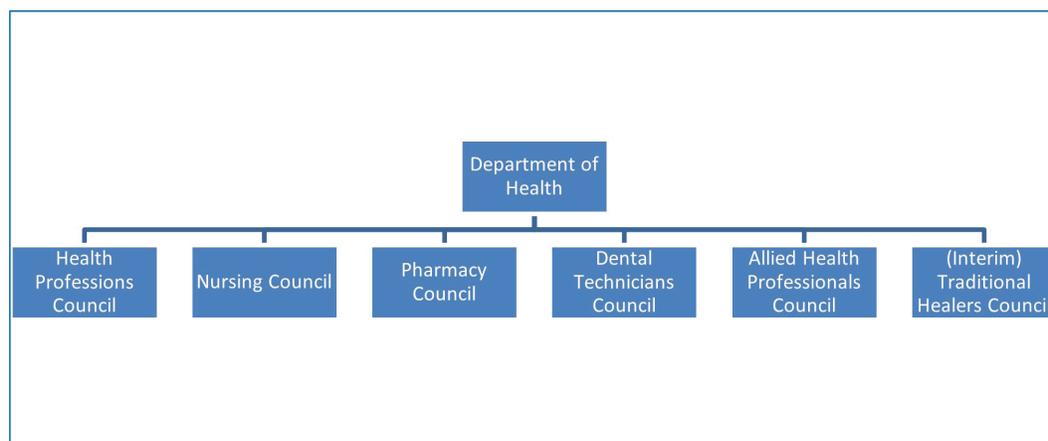
South Africa constituted the largest share of Ayush exports (22.07 per cent) to Africa in 2023. That Ayush pharmaceuticals to Africa constituted 18.73 per cent of India’s global Ayush pharmaceuticals exports in 2023 shows receptivity in the African region. The

country is, therefore, strategic for Ayush in that it may serve as a gateway to entry into other countries in the region. Hence bilateral cooperation with South Africa on a broader traditional medicine platform may be explored. This is likely to serve Ayush’s growth prospects in the African continent, too. Some of the important opportunities for Ayush in South Africa could be the following:

Opportunities for growth in export of Unani, Homeopathy and Siddha: Ayush pharmaceuticals exports, Ayurveda pharmaceuticals dominate with 96.89 per cent of total exports in 2023, followed by Homeopathy and Unani medicines. However, exports of Unani medicines have grown by a CAGR of 45.27 per cent between 2017 and 2023. It may be inferred that there is a growing market for Unani, Siddha and Homeopathy pharmaceuticals, which have yet to be tapped.

Opportunities for trade in medicinal plants: There are more than 32 medicinal plants common in usage both in South Africa

Figure 4: Health Professional Councils under the Department of Health, South Africa



Source: Author’s compilation Students of T&CM can obtain both bachelor’s and master’s degrees at the university level. The Government also officially recognises a training programme for T&CM technicians or equivalent (not at the university level). CM practices such as acupuncture, chiropractic, homoeopathic medicines, naturopathy and osteopathy are partially covered by private health insurance¹². These regulatory stream-lining provide opportunities for Ayush goods and service providers in South Africa.

Table 2: Common Medicinal Plants Traded in South African and Indian Markets

No	Family	Botanical Name	Part used	Medicinal uses	Common name in India
1	Acantaceae	<i>Ayustasia gangetica</i> (L.) T.Anderson	Leaves	Blood pressure control	Lavana-valli
3	Apiaceae	<i>Foeniculum vulgare</i> Mill	Leaves	Cramp, Stomachache and arthritis	Saunf, Sonp
4	Apocynaceae	<i>Catharanthus roseus</i> (L.) G. Don	Roots, flower, seeds	High Blood Pressure	Sadabahar, Nayantara
5	Acoraceae	<i>Acorus calamus</i> L.	Root	Tuberculosis	Bach
6	Asphodelaceae	<i>Taraxacum officinale</i> (L.) Weber ex F.H. Wigg	Flowers, leaves, roots, whole plant	Tuberculosis	Dulal, Barau
7		<i>Matricaria chamomilla</i> L.	Flower, leaves	diphtheria and Tuberculosis	Babunphul
8		<i>Lactuca sativa</i> L.	Whole plant	Tuberculosis	Kahu, Salad
9	Brassicaceae/ Capparaceae	<i>Capparis sepiaria</i> L. var. subglabra (Oliv) DeWolf	Roots	Protection from lightning and nose bleed	Kaliakara (Ben.)
10	Cannabaceae	<i>Trema orientalis</i> (L.) Blume	Leaves and fruit	bacterial pneumonia	Indian Nettle tree, jivan
11	Chenopodiaceae	<i>Chenopodium ambrosioides</i> L.	Leaves	bacterial pneumonia	Khatua
12	Euphorbiaceae	<i>Ricinus Communis</i> L.	Leaves, seeds and fruit	Pain, stomachache, headache	Erandi
13	Fabaceae	<i>Acacia nilotica</i> (L.) Delile	Root	Tuberculosis	Kirkar, Babula
14		<i>Arachis hypogaea</i>	Leaves, seed	Blood pressure control	Mung-phali
15		<i>Trifolium pratense</i> L.	Flowers	Tuberculosis and Cough	Trepatra, Chit-batto (Punjab), Red clover (English)
16		<i>Indigofera tinctoria</i> L.	Flowers	Whooping cough	Nil, Nilika
117		<i>Dichrostachys cinerea</i> (L.) Wight & Arn.	Leaves and roots	Tuberculosis and bacterial pneumonia	Kheri, Vartuli
18		<i>Pelargonium graveolens</i> L'Herit.	Leaves	Tuberculosis	Rose-Scented Geranium
19	Lamiaceae	<i>Mentha aquatic</i> L.	Leaves, stem, seed	High blood pressure	Water Mint (Eng.)
20		<i>Mentha longifolia</i> (L.) Huds.	Leaves, stem,	High blood pressure, TB, whooping cough and diphtheria	Jungli pudina
21		<i>Thymus vulgaris</i> L.	Leaves	Whooping cough	Thyme
22		<i>Thymus serpyllum</i> L.	Leaves and flowers	Whooping cough	Banajwain
23	Lauraceae	<i>Cinnamomum Camphora</i> (L.) Sieb.	Gum		Kapur
24		<i>Cinnamomum verum</i> J.Presl.	Leaves. Essential oil	Tuberculosis , bacterial pneumonia	Dalchini
25	Moraceae	<i>Ficus carica</i> L	Leaves and roots	diphtheria	Anjir
26	Myrtaceae	<i>Eucalyptus globulus</i> Labill.	Leaves	Tuberculosis and diphtheria	Yukeliptas, Eucalyptus
28	Rosaceae	<i>Prunus persica</i> (L.) Batsch	Leaves	Whooping cough	Aru, Shaftalu
29		<i>Prunus cerasus</i> L	Leaf	Tuberculosis	Alubalu
30	Solanaceae	<i>Withaniasomnifera</i> (L.) Dunal	Root	Tuberculosis	, Ashwagandha
31		<i>Solanum nigrum</i> L.	Leaves	Tuberculosis	Makoi
32		<i>Datura stramonium</i> L.	Leaves	Backache, headache	Dhatura
33	Sapindaceae	<i>Dodonaea viscosa</i> (L.) Jacq.	Leaves, twigs	Tuberculosis and diphtheria	Sanatta, Sinatha

Source: Authors' compilation.

and India. Given the challenges of sustainable supply of medicinal plants and the growing demand of India's rising Ayush sector, opportunities for sourcing from South Africa may be explored. At present, although India's imports of MAPs and extracts from South Africa in minimal (USD 0.37 million in 2023), encouragingly, imports have encouragingly grown at a CAGR of 9.39 per cent between 2017 to 2023. While the trade balance in MAPs is still in favour of India (USD 5.8 million in 2023) growth has been slow at 0.80 per cent between 2017- 2023. This demonstrates the possibility of a dynamic trade relation with South Africa, one that benefits both countries.

Indian community a market linkage asset. The Indian-origin community numbers around one million and constitutes about 3 per cent of South Africa's total population¹⁴. It is the flag bearer of Ayush with consumption, sales and promotion of Ayush systems in South Africa. The Indian-origin community can be harnessed for easier access with the above-mentioned requirement.

Well-defined laws and regulations for allied health products and services: The regulatory landscape is fast evolving with clear guidelines for complementary medicines. Complementary medicine is now a category specifically regulated under the South African Health Products Regulatory Authority (SAHPRA) The Allied Health Professions Council of South Africa (AHPSCSA), a statutory body, issues the licence required to practise. The use of health practitioners may be harnessed for the growth of Ayush in South Africa.

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