



GLOBAL DIRECT SELLING INDUSTRY

**STATISTICAL INFORMATION & DATA INSIGHTS
FY 2022-23**

Global Direct Selling Industry

Contributing Half a Trillion US Dollars to the Global Economy.



125 Million People Involved in Direct Selling Industry Globally

GLOBAL DIRECT SELLING FACTUAL INFORMATION

Positive Global Impact of Direct Selling Industry

Global Direct Selling Industry in Transition

Global Retail Sales in USD (Millions)

Global Direct Selling Market Share

Top 10 Global Direct Selling Markets

Global Salesforce Size Aligns with Sales Trends During 2019-2023

Region-wise Global Direct Selling Representatives - 2023

Global Direct Selling Representatives by Age

Global Sales by Product Category

Top Direct Selling Markets – Exceeding \$1 Billion USD

POSITIVE GLOBAL IMPACT OF THE DIRECT SELLING INDUSTRY

1

Empowering Local
Communities

2

Providing Quality
Goods and Services



Supporting Household
Incomes

3

Promoting Flexible
Entrepreneurship

4

GLOBAL DIRECT SELLING INDUSTRY IN TRANSITION

The Direct Selling Industry experience transformation, especially since the onset of COVID-19, Pandemic in 2020

Pandemic Driven Shifts
The Pandemic accelerated Industry's transition to



Increased focus
on essential
goods



Emphasis on
Health and
Wellness
Products



Demand for
personalized
shopping
experience



Consumer Behaviour Changes
Driving demand for Direct Selling Offerings



Social
Selling



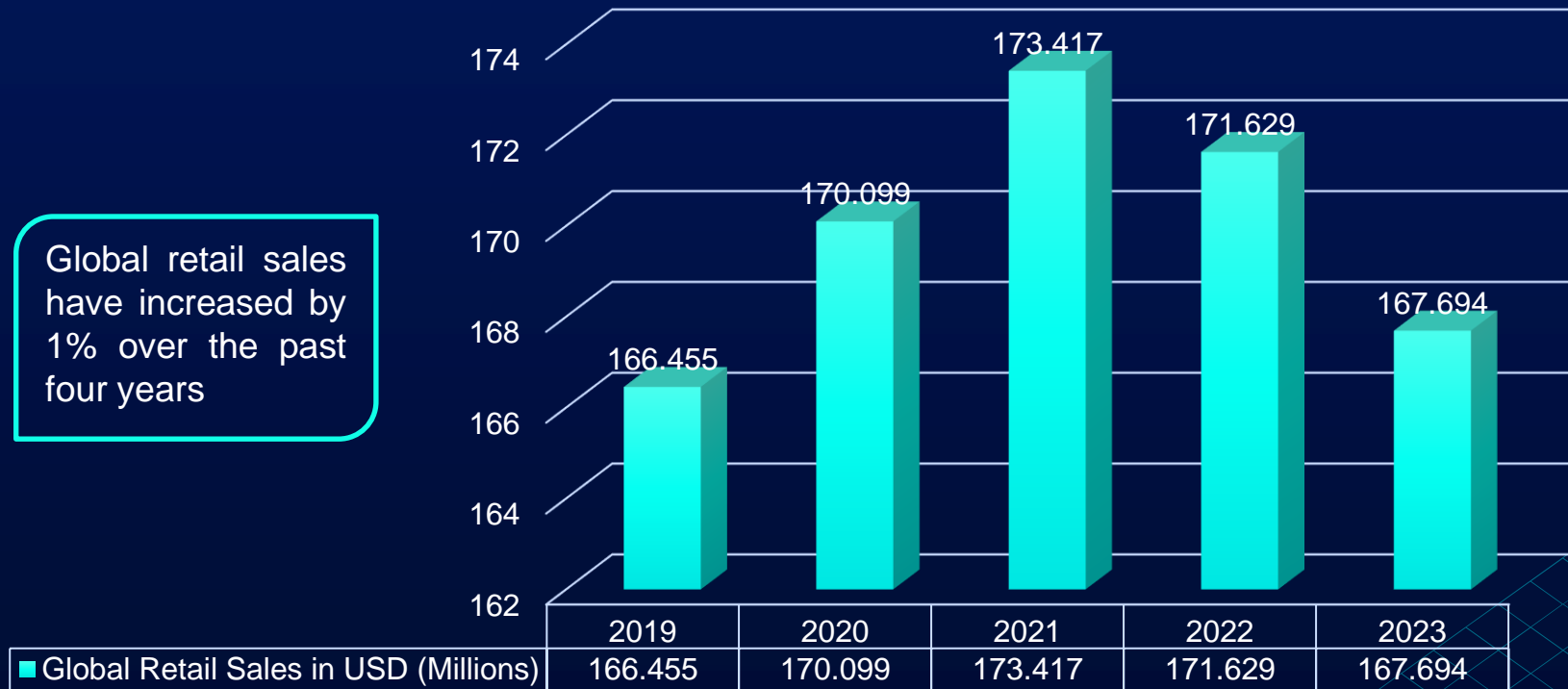
Contactless
Delivery



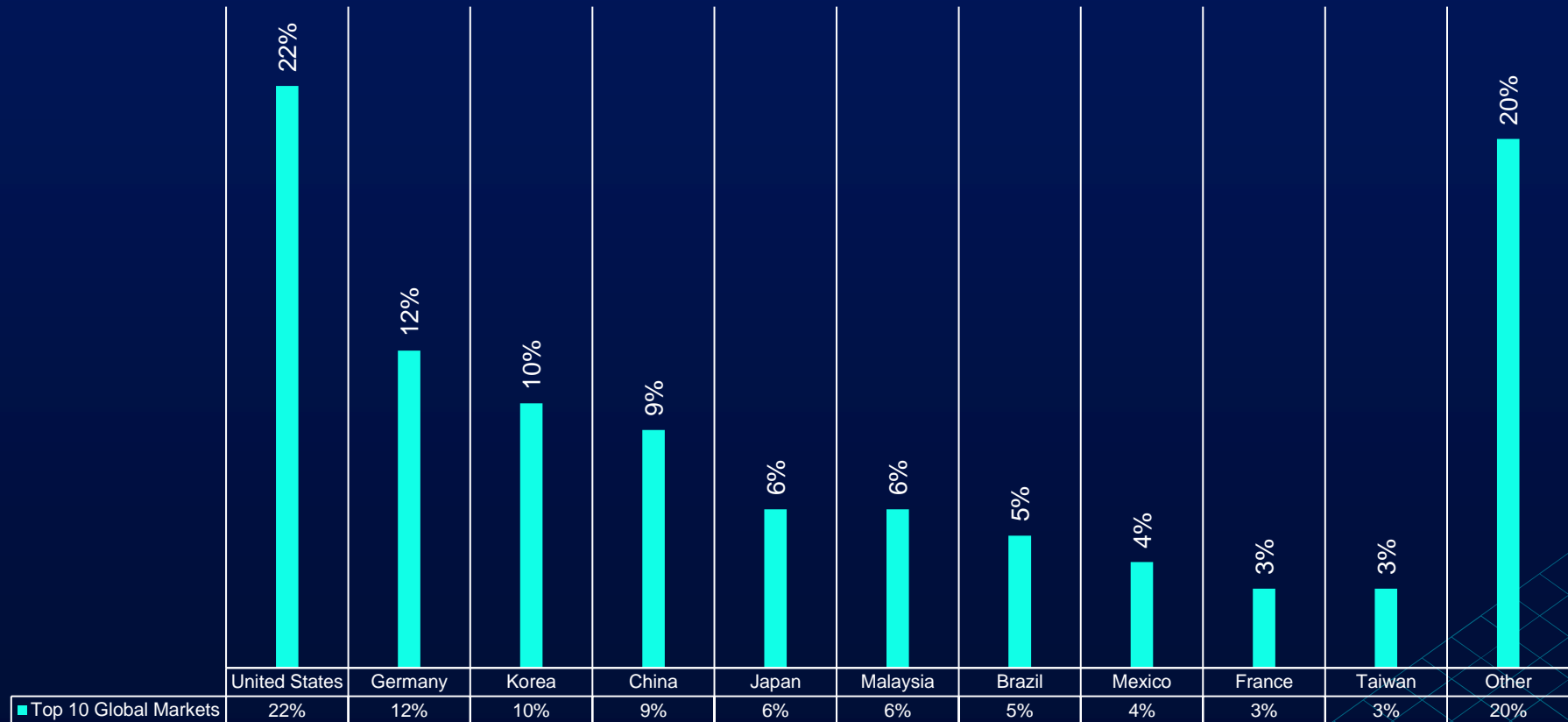
Digital
Transformation

GLOBAL RETAIL SALES IN USD (MILLIONS)

Demonstrating resilience in the face of Geo - Political Challenges

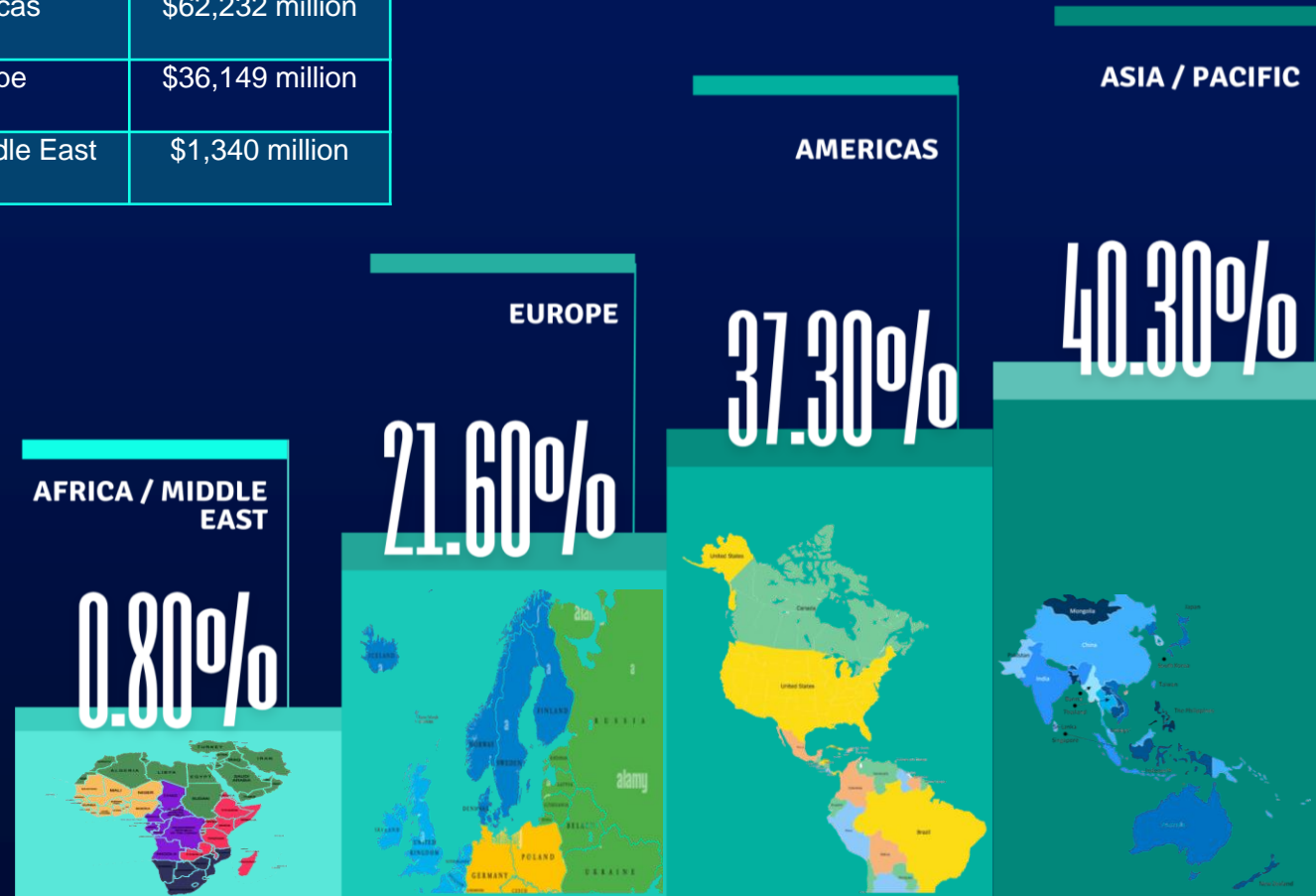


TOP 10 GLOBAL DIRECT SELLING MARKETS

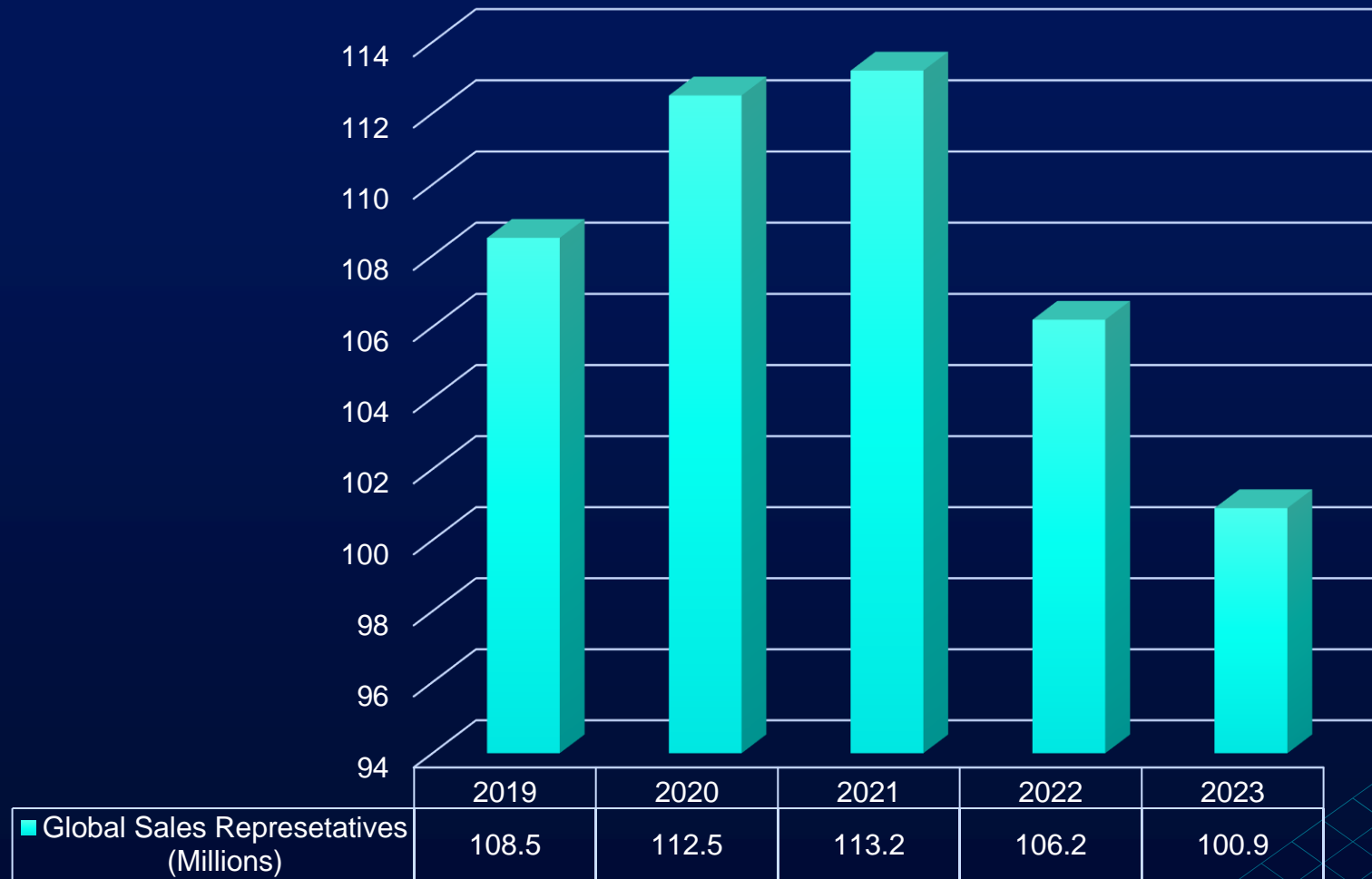


GLOBAL DIRECT SELLING MARKET SHARE

1 st Rank	Asia-Pacific	\$67,573 million
2 nd Rank	Americas	\$62,232 million
3 rd Rank	Europe	\$36,149 million
4 th Rank	Africa/Middle East	\$1,340 million

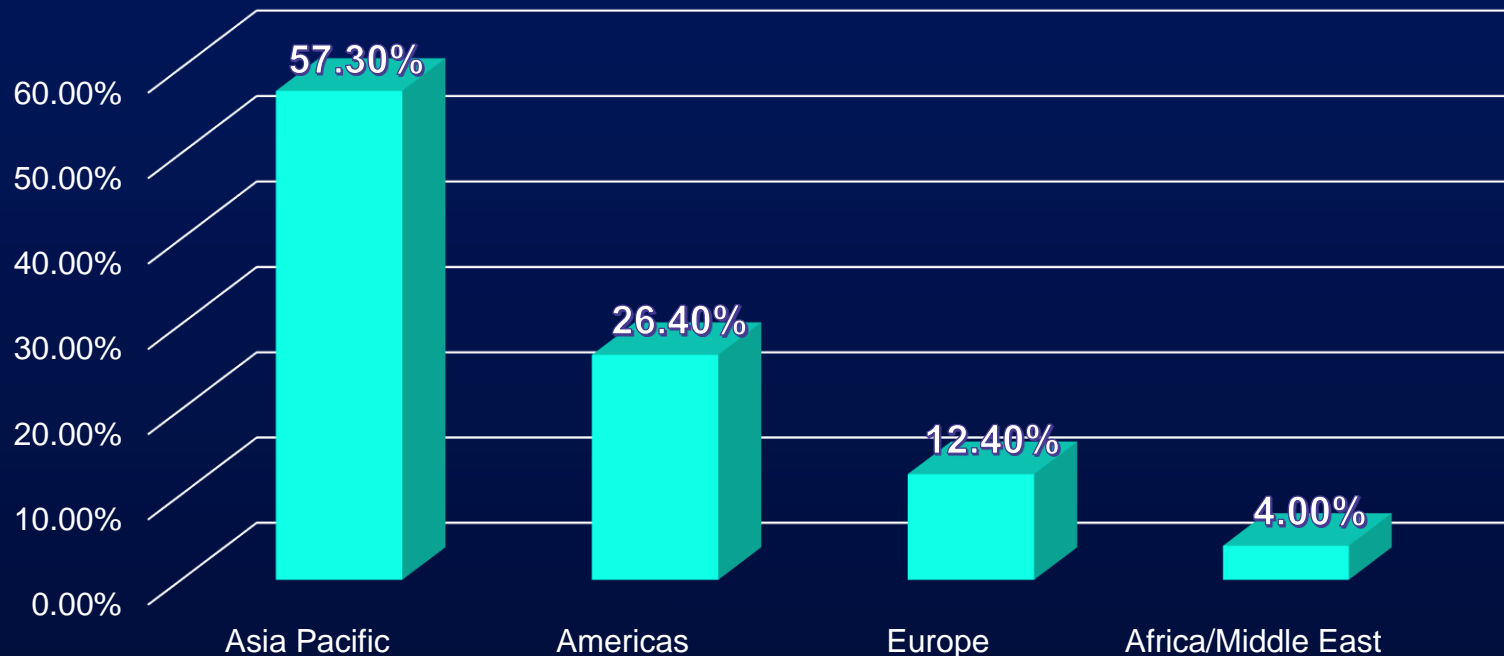


GLOBAL SALESFORCE (2019-2023)



REGION WISE GLOBAL DIRECT SELLING REPRESENTATIVES - 2023

2023 Share of Representatives



Asia-Pacific region accounted for 59.0 million representatives, making up 57.3% of the global sales force and followed by the Americas with 27.1 million representatives. (26.4%), Europe with 12.7 million (12.4%), and Africa/Middle East with 4.1 million (4.0%).

GLOBAL ACTIVE DIRECT SELLERS BY AGE



Nearly half (48.7%) of independent representatives aged 35 to 54



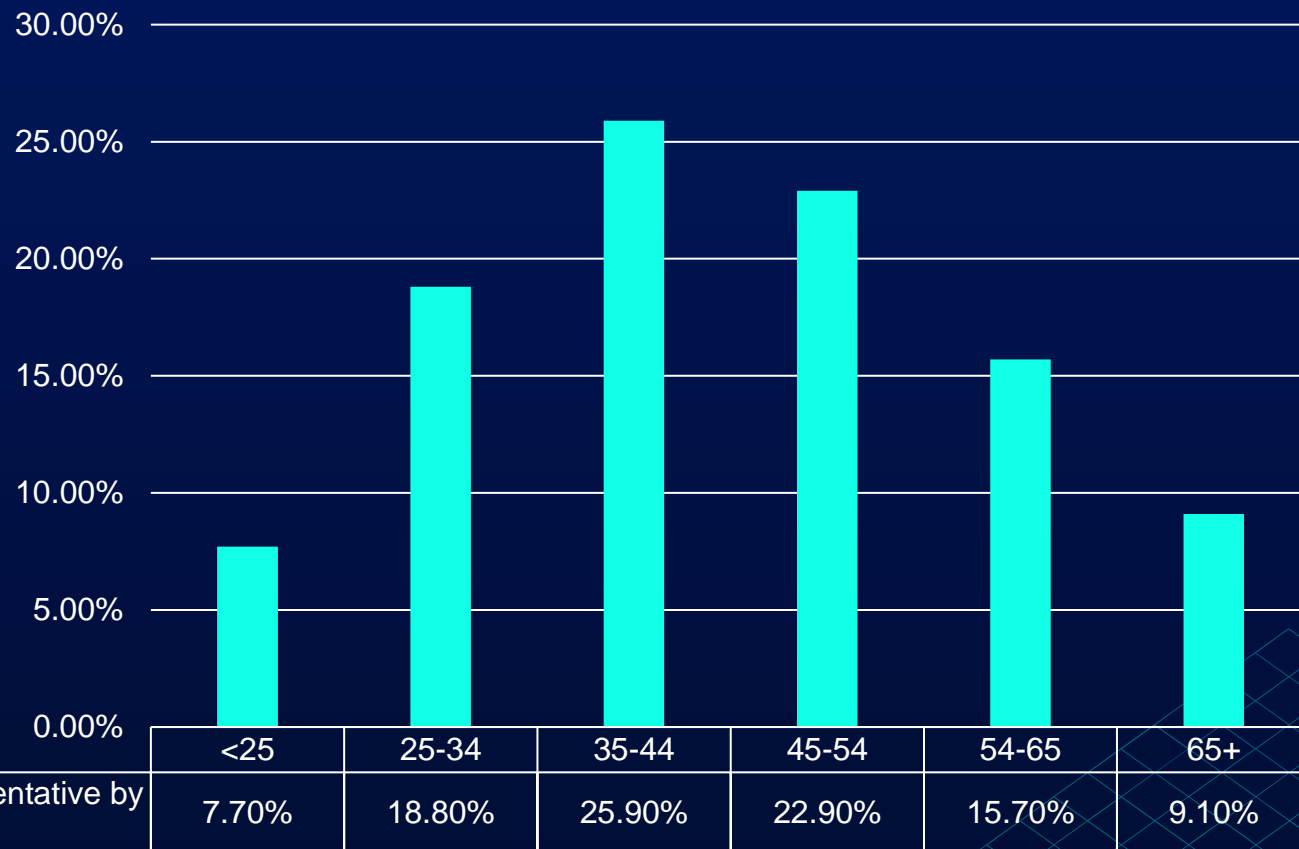
25.9% are 34 years or younger



24.8% are over 54 years

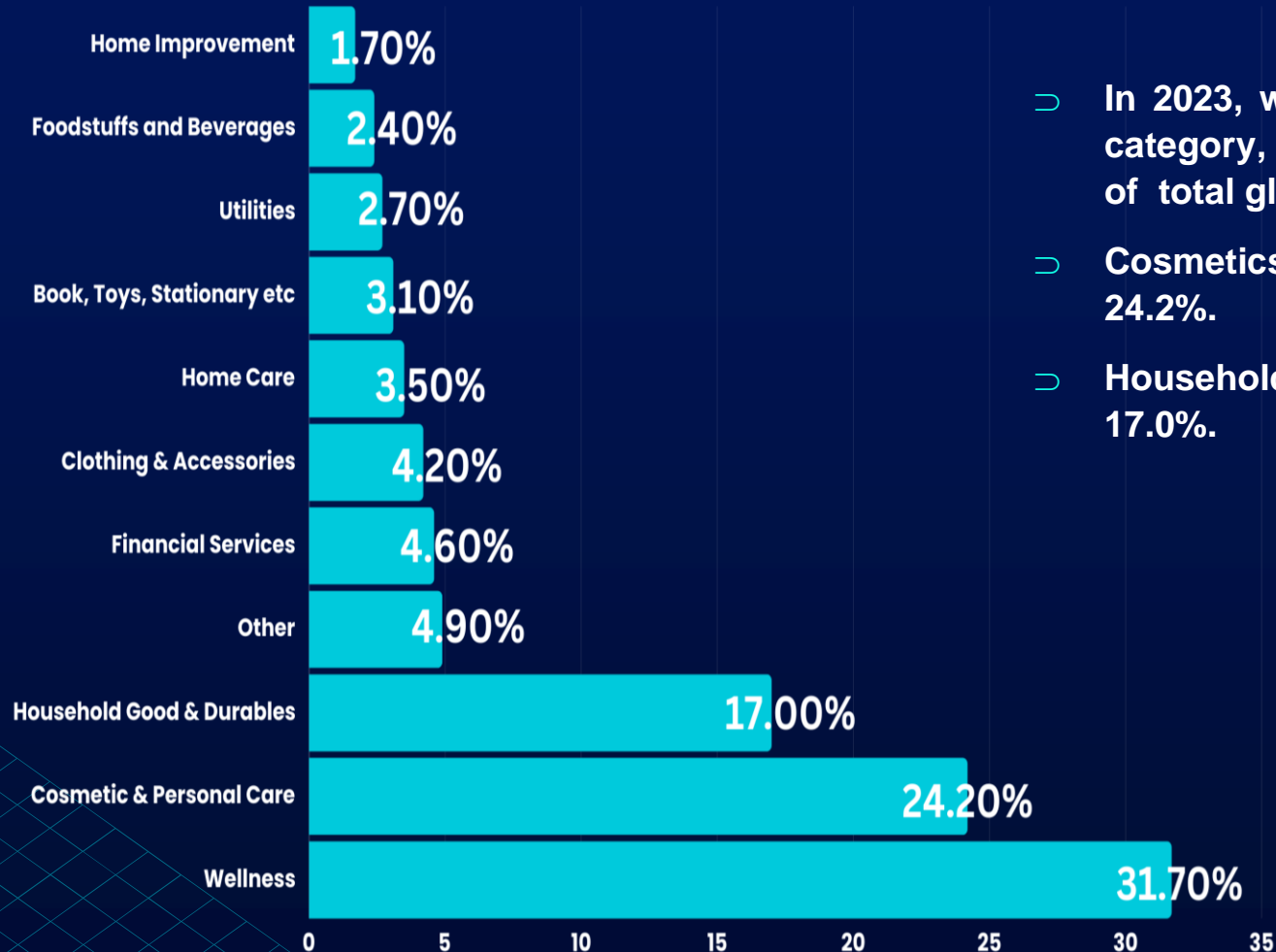
Global Direct Selling Industry Attracting Mature and Experienced Workforce to its Sales Force

GLOBAL ACTIVE DIRECT SELLERS BY AGE



■ Global Direct Selling Representative by Age

GLOBAL SALES BY PRODUCT CATEGORY



- In 2023, wellness was the largest category, at (31.7%) i.e. one third of total global sales
- Cosmetics & personal care at 24.2%.
- Household goods & durables at 17.0%.

TOP DIRECT SELLING MARKETS EXCEEDING \$1 BILLION USD

RANK	MARKET	2023 RETAIL SALES IN USD (MILLIONS)	3-YEAR CAGR (2023 CONSTANT USD)
1	 UNITED STATES	\$36,660	-2.9%
2	 GERMANY	\$19,761	5.1%
3	 KOREA	\$16,298	0.5%
4	 CHINA	\$15,043	-7.0%
5	 JAPAN	\$10,630	-3.2%
6	 MALAYSIA	\$9,503	8.1%
7	 BRAZIL	\$7,962	-2.0%
8	 MEXICO	\$6,874	2.5%
9	 FRANCE	\$4,706	-1.0%
10	 TAIWAN	\$4,530	2.3%
11	 INDIA	\$3,435	8.3%
12	 ITALY	\$2,959	3.3%
13	 CANADA	\$2,352	-8.5%
14	 COLOMBIA	\$2,312	10.8%
15	 THAILAND	\$21,61	-6.6%
16	 PERU	\$2,129	6.2%
17	 ARGENTINA	\$1,778	72.0%
18	 INDONESIA	\$1,281	-6.0%
19	 RUSSIA	\$1,266	-11.7%
20	 UNITED KINGDOM	\$1,130	3.4%
21	 POLAND	\$1,094	1.0%



Germany

Rose from 3rd Position to 2nd Position Achieving a 5.1% CAGR Growth and Sales Turnover of \$19,761 million

Poland

Rose to 21st Position With a 1.0% CAGR Growth and Sales Turnover of \$1094 million

India

Advanced from 15th Position to 11th Position Recording a 8.3% CAGR Growth and Sales Turnover of \$3435 million



Korea

Dropped from 2nd Position to 3rd Position With a 0.1% CAGR Growth and a Sales Turnover of \$16,298 million

Russia

Fell from 18th Position to 19th Position Experiencing an -11.7% CAGR decline and a Sales Turnover of \$1,266 million

Australia

Annual Sales have fallen below \$1 billion Experiencing a -35.8% CAGR decline and a Sales Turnover of \$747 million

INDIAN DIRECT SELLING INDUSTRY



➤	Indian Direct Selling Industry in FY 2022-23
➤	Top States for Direct Selling in India FY 2022-23
➤	Top 10 States For Direct Selling in India (FY 2022-23)
➤	Breakdown of Regional Sales Indian Direct Selling Industry (FY 2022-23)
➤	Indian Direct Selling Industry in FY 2022-23
Indian Direct Selling Industry – Historical Data	
➤	Indian Direct Selling Industry Growth (2006-07 – Till Date)
➤	Indian Direct Selling Turnover (2006-07 – Till Date)
➤	Number of Distributors (FY 2006-07 – Till Date)
➤	Gender Distribution Indian Direct Selling Industry (2008-09 – 2022-23)
➤	Health and Wellness (2010-11 – Till Date)

INDIAN DIRECT SELLING INDUSTRY FY 2022-23

India's Direct Selling Industry Achieved Over 12% Growth.

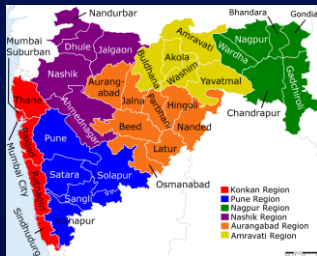
The Total Industry Turnover Reached Rs 21,282 Crore In 2022–23.

**Wellness & Nutraceutical Products had a Market Share of 73.5%
Cosmetics and Personal Care Accounted for 11.3%**

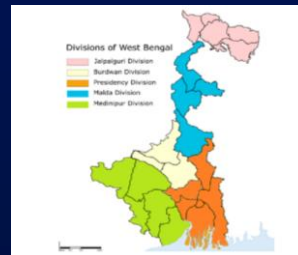
**The Industry saw a 4-year CAGR of 8.3%, With Active Direct
Sellers Rising to Approximately 8.6 Million, Up From 8.4 Million in
2021–22.**

TOP STATES FOR DIRECT SELLING IN INDIA FY 2022-23

According to a survey by the Industry, Maharashtra was the top state for direct selling revenue in India in 2022-23, with 12% of the industry's turnover, followed by West Bengal and Uttar Pradesh with 10% each.



Maharashtra
Ranking 1st
Turnover 12%



West Bengal
Ranking 2nd
Turnover 10%



Uttar Pradesh
Ranking 3rd
Turnover 10%

TOP 10 STATES FOR DIRECT SELLING IN INDIA

FY 2022-23



Maharashtra
1st Rank



West Bengal
2nd Rank



Uttar Pradesh
3rd Rank



Bihar
4th Rank



Karnataka
5th Rank



Odisha
6th Rank



Haryana
7th Rank



Gujarat
8th Rank



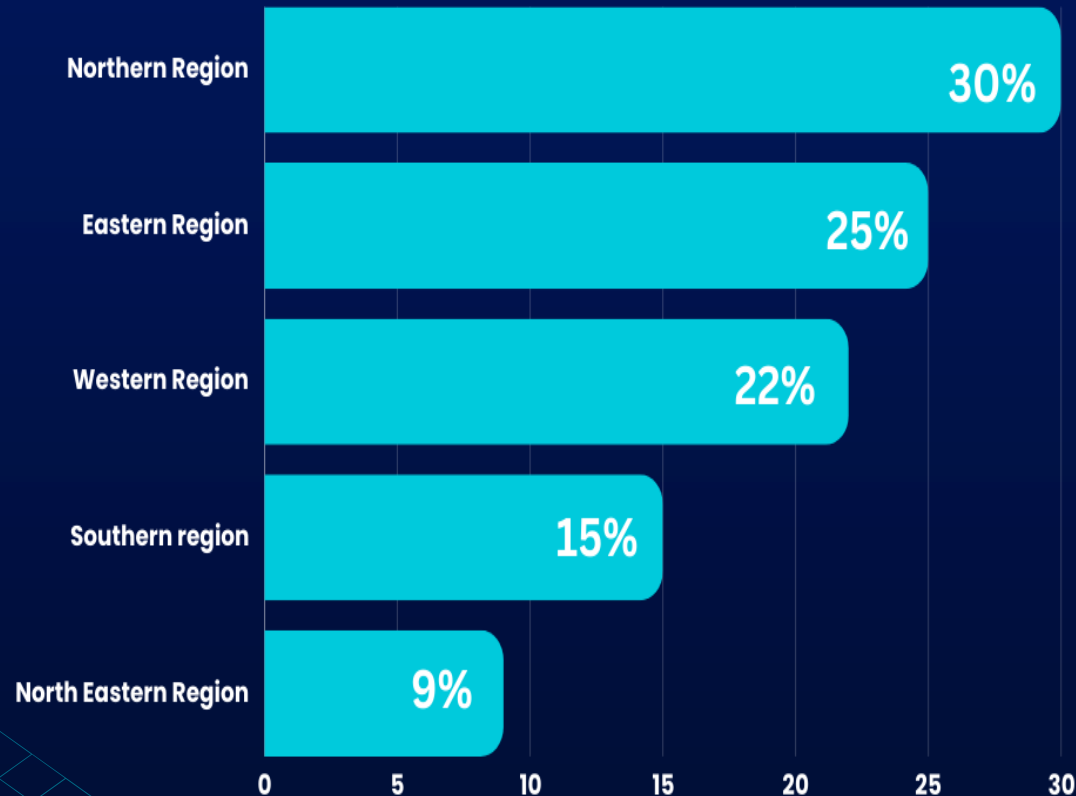
Assam
9th Rank



Delhi
10th Rank

REGIONWISE SALES

INDIAN DIRECT SELLING INDUSTRY FY 2022-23

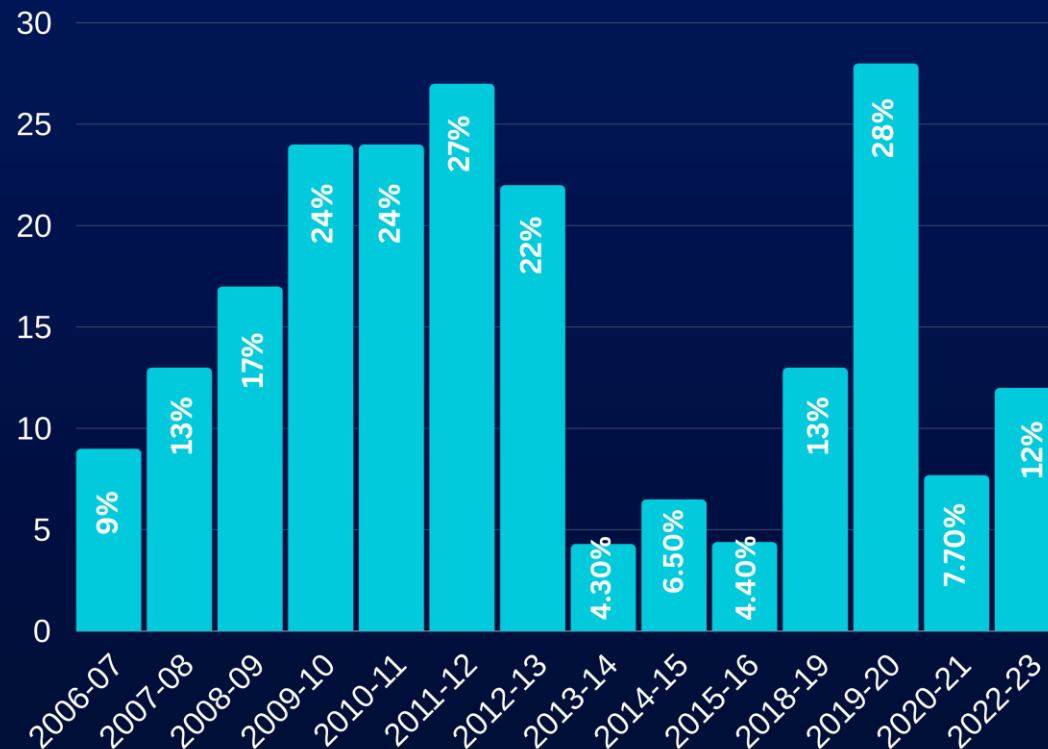


- **NORTHERN REGION:** The top contributor to total sales, holding a 30% share in 2021-22, with Uttar Pradesh leading by contributing 10.1% of the national turnover.
- **EASTERN REGION:** The second-largest contributor, representing 25% of total sales, with West Bengal accounting for 10.4% of the national turnover.
- **WESTERN REGION:** Contributed 22% to the direct selling market during 2021-22.
- **SOUTHERN REGION:** Accounted for 15% of total gross sales in 2021-22.
- **North-Eastern Region:** Provided 8% of total gross sales in 2021-22.

INDIAN DIRECT SELLING INDUSTRY HISTORICAL DATA



INDIAN DIRECT SELLING INDUSTRY GROWTH (2006-07 – TILL DATE)



Indian Direct Selling Industry's growth curves can be divided in three phases

1st Phase F.Y 2006-07 – F.Y 2012-13

During this Phase , Industry experienced steady growth consistently, with growth peaking at 27% in FY 2011-12

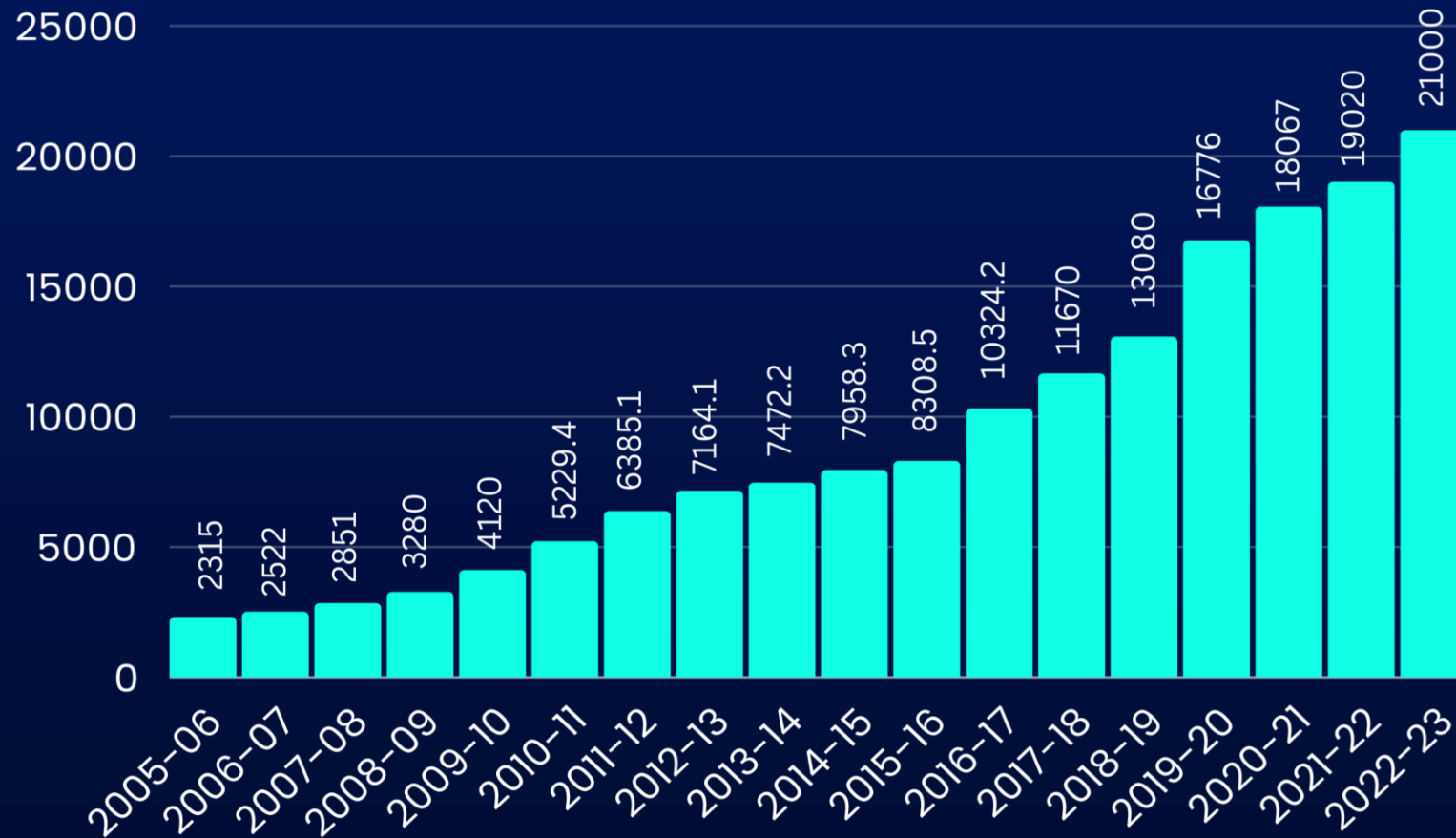
2nd Phase FY 2013-14 – FY 2015-16

During this Phase, Industry experienced a slump, with growth touching diving down to 4.30% in FY 2013-14

3rd Phase FY 2018-19 – FY 2022-23

During this Phase, Industry experienced recovery with Growth Rate reaching at 13% in FY 2018-19 and scaling its highest growth rate of 28% in FY 2019-20

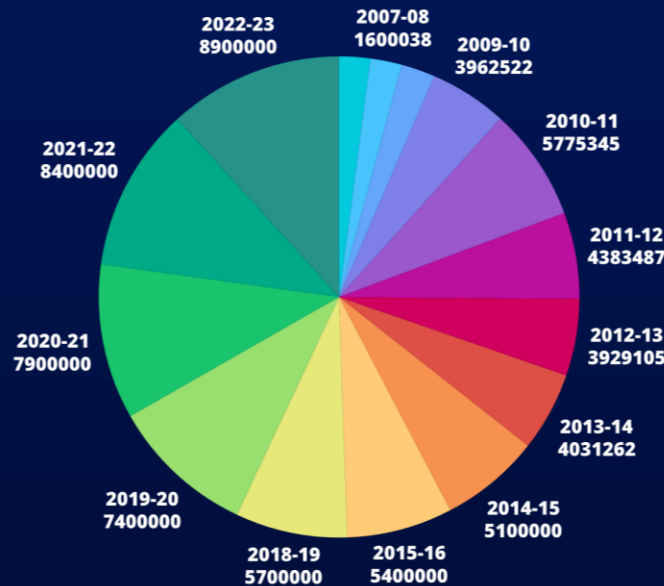
INDIAN DIRECT SELLING TURNOVER (2006-07 – TILL DATE)



NUMBER OF DISTRIBUTORS (FY 2006-07 to FY 2022-23)

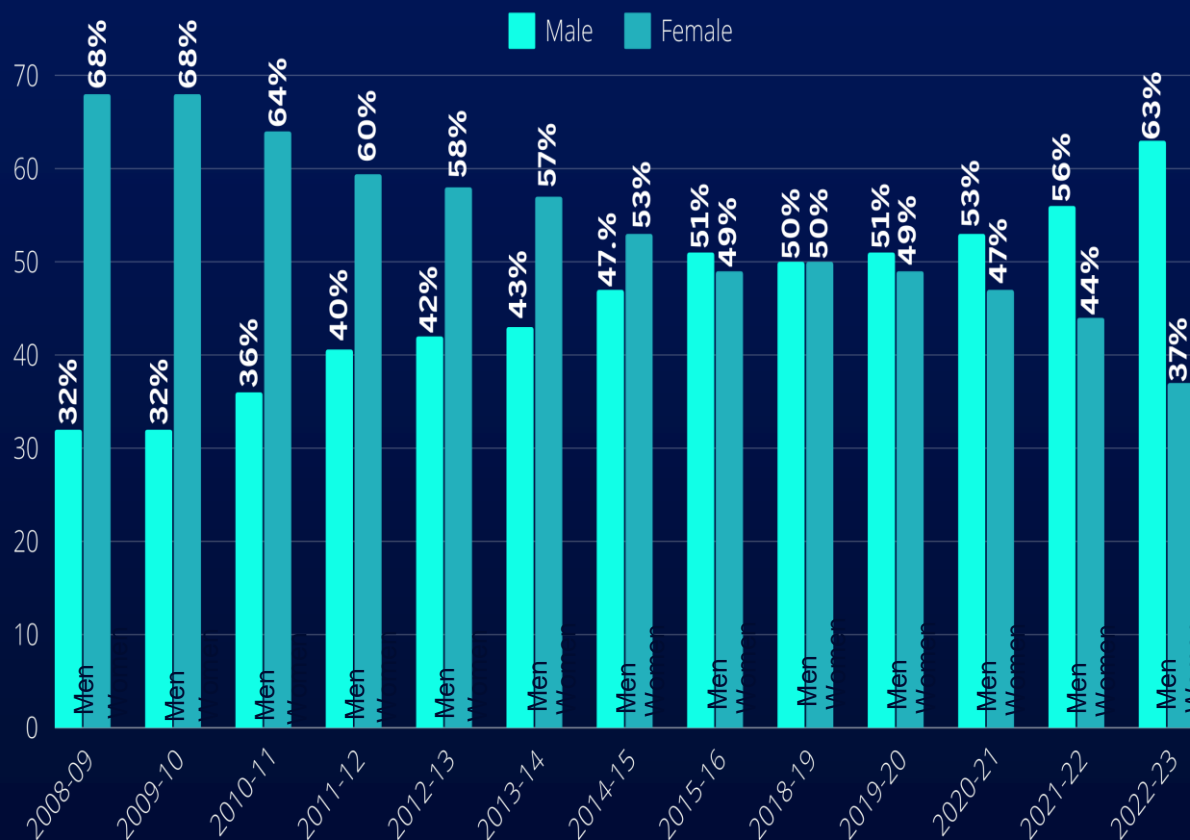
Active Distributors

FY 2006-07	1578367
FY 2007-08	1600038
FY 2008-09	1730000
FY 2009-10	3962522
FY 2010-11	5775345
FY 2011-12	4383487
FY 2012-13	3929105
FY 2013-14	4031262
FY 2014-15	5100000
FY 2015-16	5400000
FY 2018-19	5700000
FY 2019-20	7400000
FY 2020-21	7900000
FY 2021-22	8400000
FY 2022-23	8900000



- Over the past 18 years since FY 2006-07, the number of active direct sellers in the Indian direct selling industry has grown by approximately 600% from a base of 1,578,367 in 2006-07.
- Currently, the active direct seller base has increased to around 900% at 86 Approximately Lakhs.

GENDER DISTRIBUTION INDIAN DIRECT SELLING INDUSTRY (2008-9 – 2022-23)

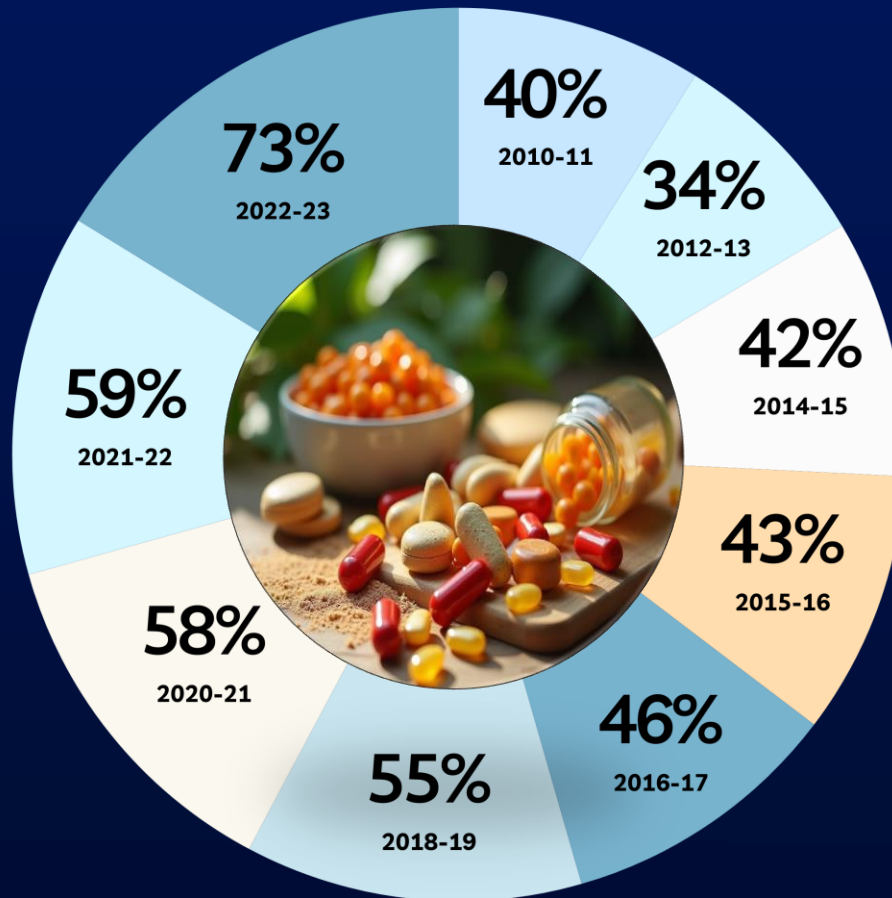


Traditionally, the Indian direct selling industry has been dominated by women, due to its product offerings and Marketing Plans designed to encourage their participation.

In FY 2008-09, women made up 68% of the industry.

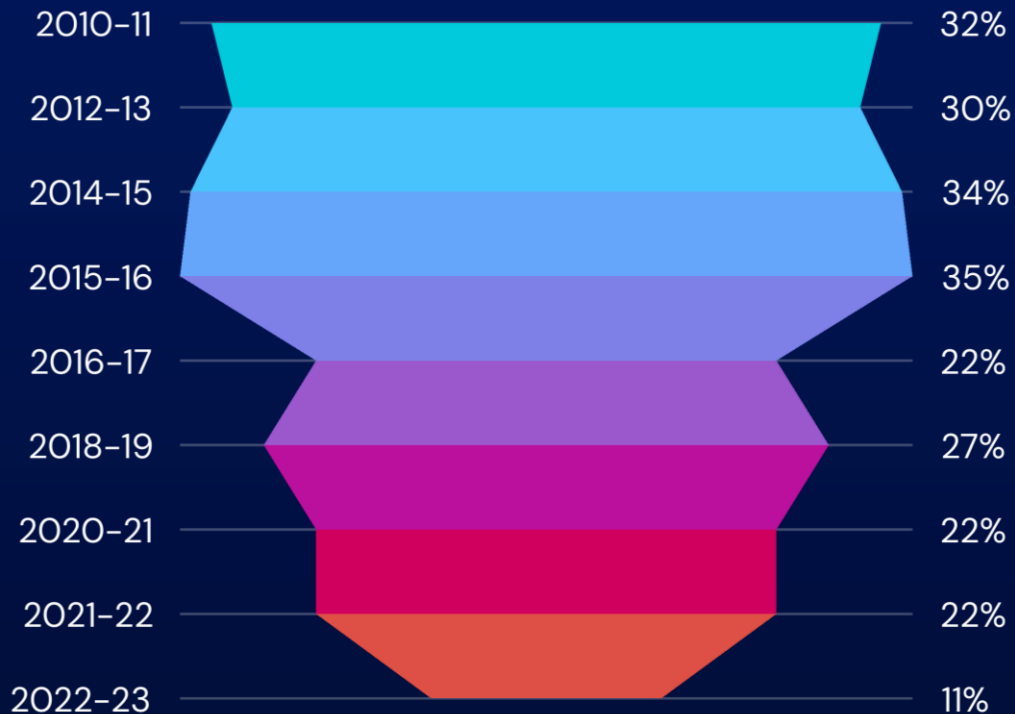
However, recent years have seen a rise in men participation. By FY 2022-23, men accounted for 63% of the industry, with women comprising 37%.

HEALTH AND WELLNESS (2010-11 – TILL DATE)



- Within product categories, wellness products have shown steady growth since FY 2010-11, when they held a 40% share.
- By FY 2022-23, wellness products accounted for 73% of the Indian direct selling industry.

COSMETICS AND PERSONAL CARE (2010 – TILL DATE)



- The cosmetics and personal care product category has been on a downward trend since FY 2010-11, when it held a 32% sales share.
- By FY 2022-23, its share had decreased to 11%.



DIRECT SELLING IN ASIA PACIFIC



Asia Pacific Annual Retail Sales in USD (Millions)



Market Performance Asia Pacific (2019-2023)



Asia Pacific – Regional Sales (Millions)



Gender Distribution (Male/Female Direct Sellers) – Asia Pacific



Share of Product Categories – Asia Pacific



AUSTRALIA



TAIWAN



SINGAPORE



KAZAKHSTAN



NEW ZEALAND



VIETNAM



PHILIPPINES



INDONESIA



THAILAND



INDIA



HONG KONG



MALAYSIA



JAPAN



CHINA



SOUTH KOREA



DIRECT SELLING IN ASIA PACIFIC

Sales Turnover \$67.5 Billion in Retail Sale

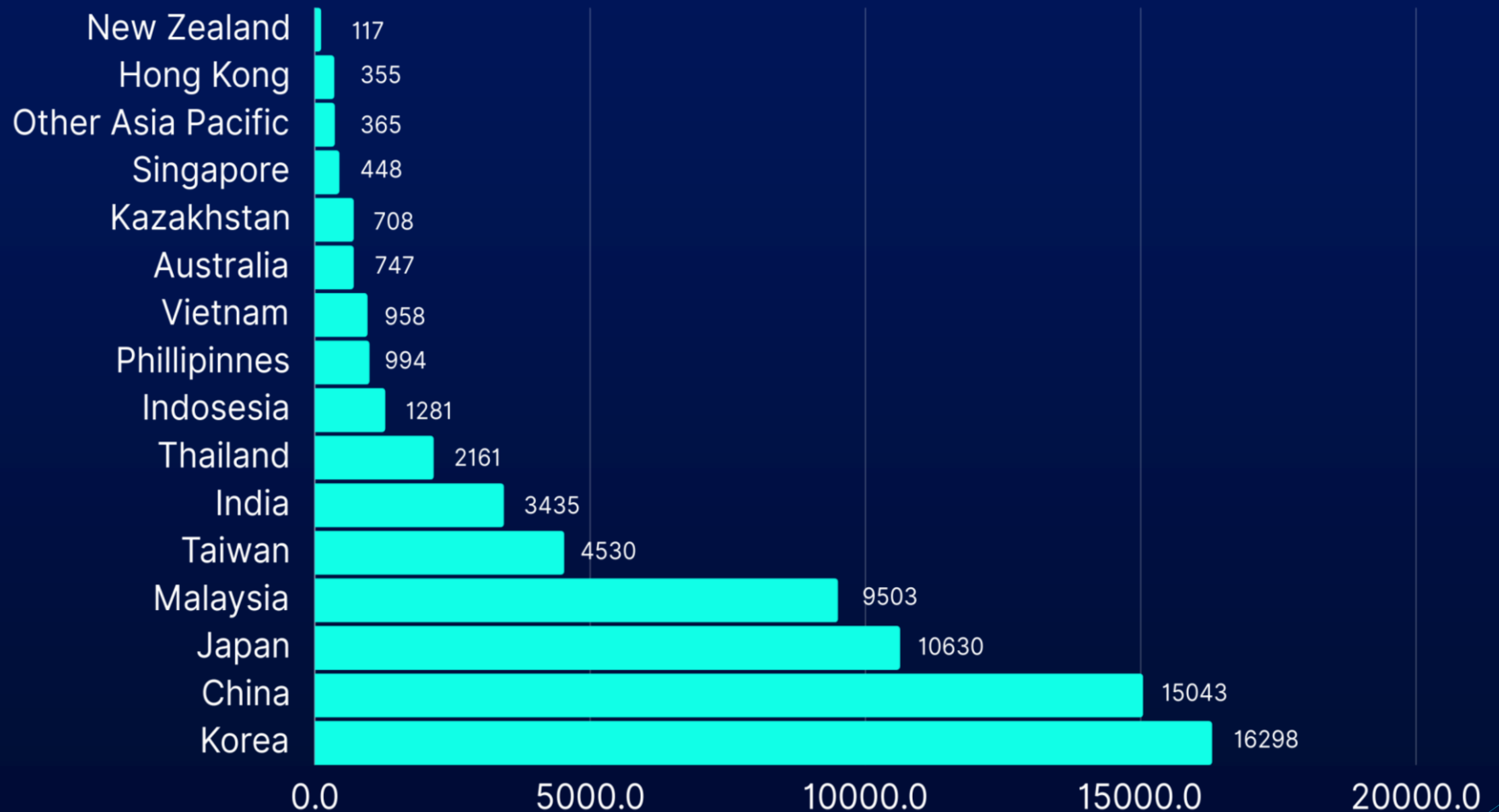


Representing 48.7% of Global Retail Sales

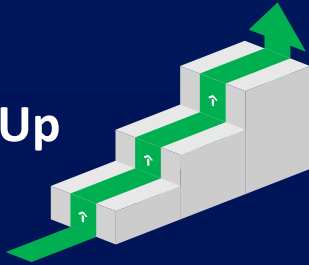


Active Direct Sellers – 58,980,741

ASIA PACIFIC ANNUAL RETAIL SALES IN USD (MILLIONS)



Sales Up



Malaysia

Recorded +8.1% CAGR Growth
Achieved Sales Turnover of
\$9503 million

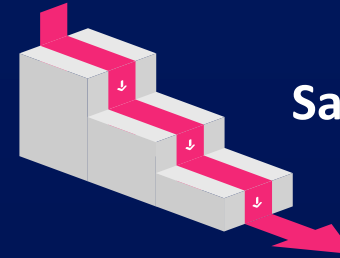
Taiwan

Recorded +2.3% CAGR Growth
Achieved Sales Turnover of
\$4530 million

Kazakhstan

Recorded +30.4% CAGR Growth
Achieved Sales Turnover of \$708
million

Sales Dip



Japan

Experienced -3.2% CAGR Decline
and -2.2% Annual Growth with a
Turnover of \$4530 million

Thailand

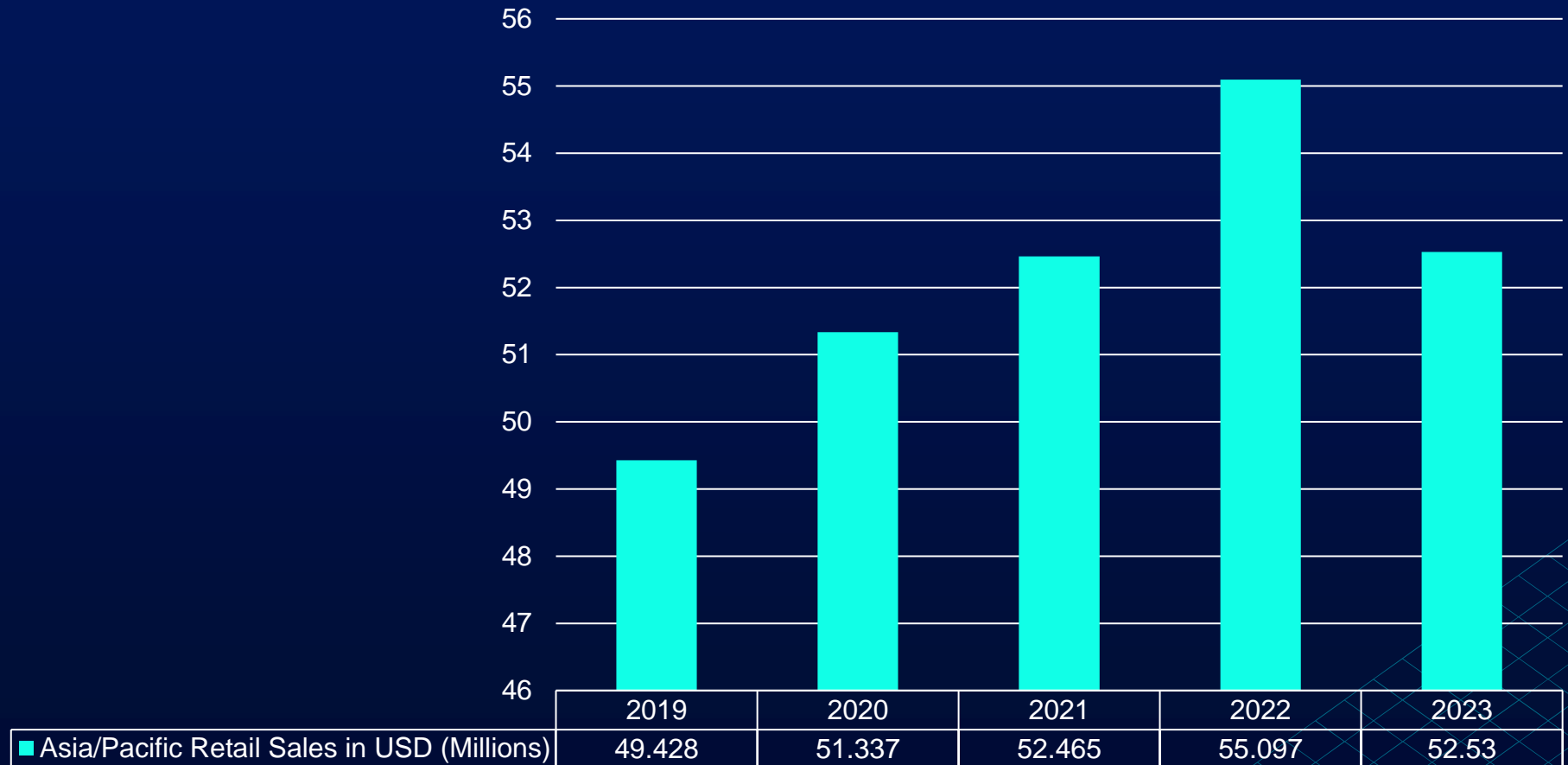
Experienced -6.0% CAGR Decline
and -6.0 Annual Growth with a
Turnover of \$2161 million

Indonesia

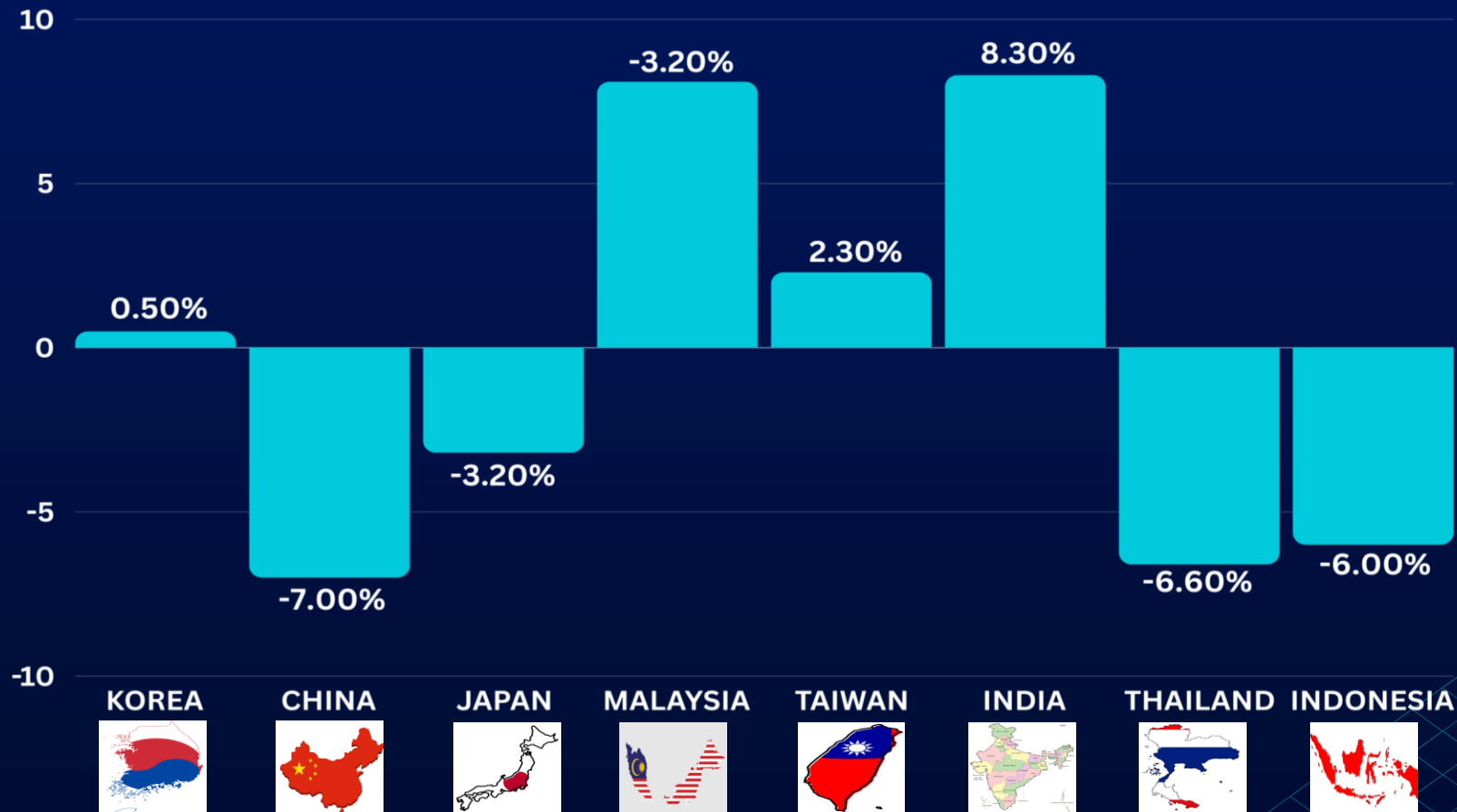
Experienced -6.0% CAGR Decline
and -10.6% Annual Growth with a
Turnover \$1281 million

MARKET PERFORMANCE ASIA PACIFIC (2019-2023)

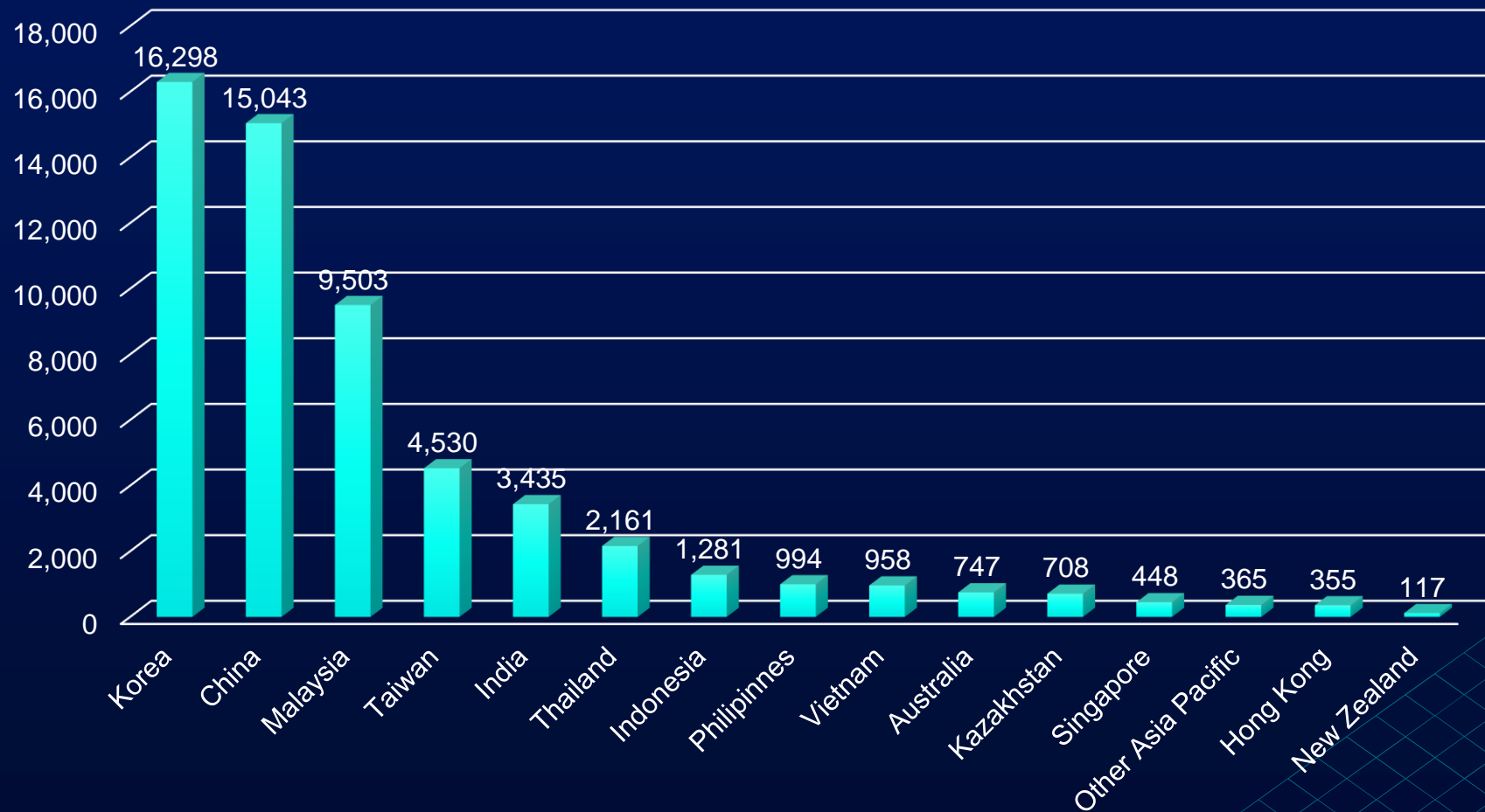
Asia/Pacific Retail Sales in USD (Millions)



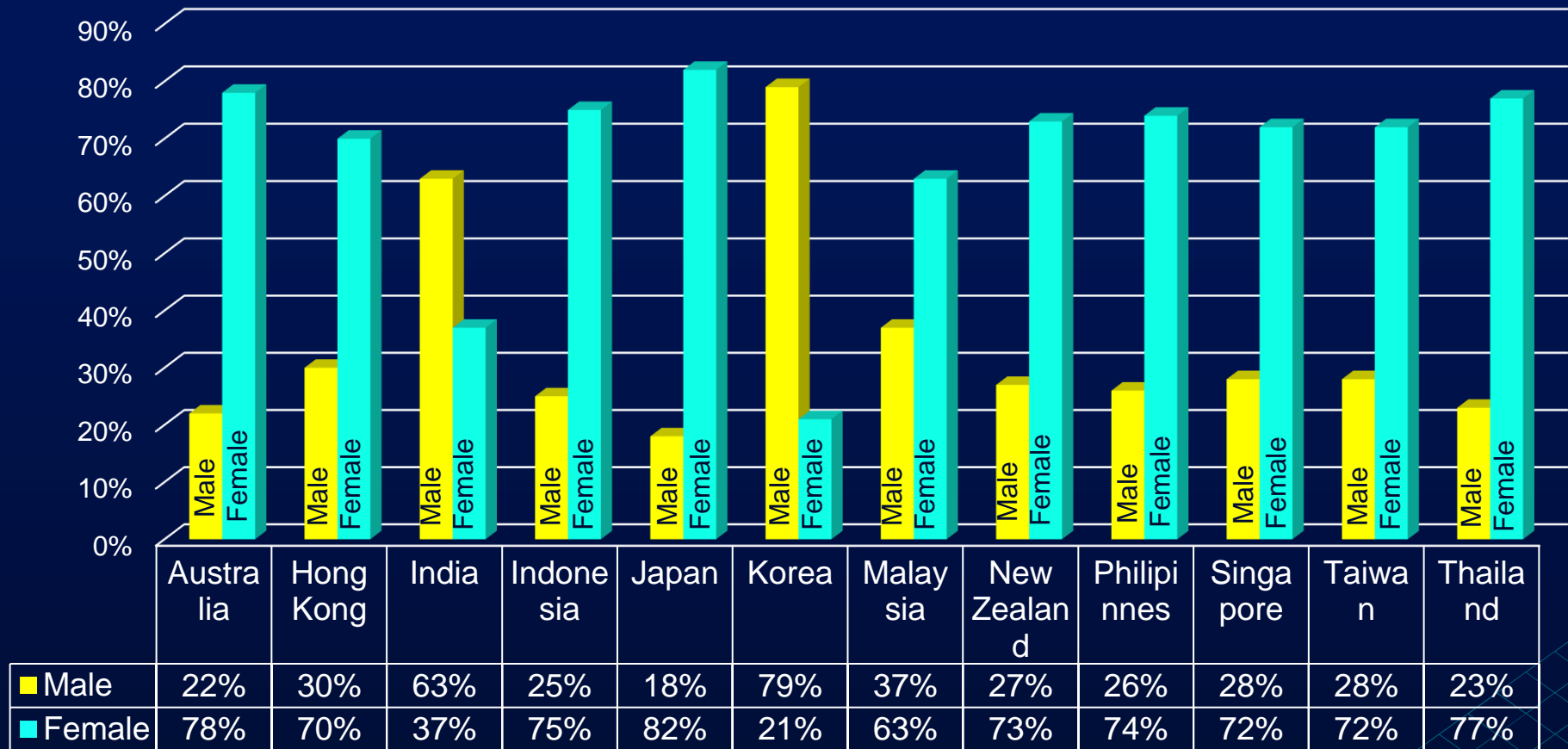
ASIA PACIFIC TOP MARKET COMPOUNDED ANNUAL GROWTH RATE (CAGR) PERFORMANCE



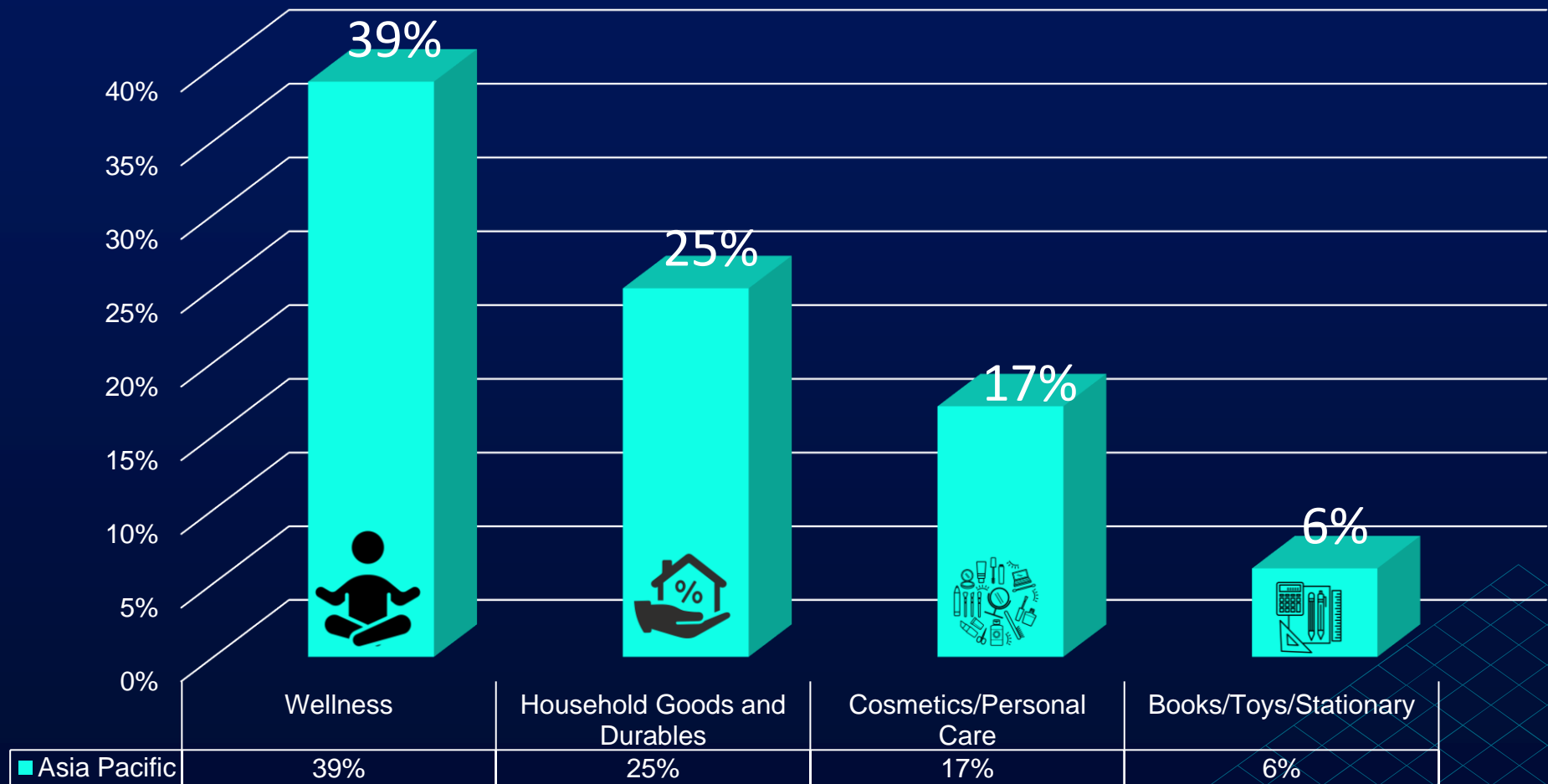
ASIA PACIFIC – REGIONAL SALES (MILLIONS)



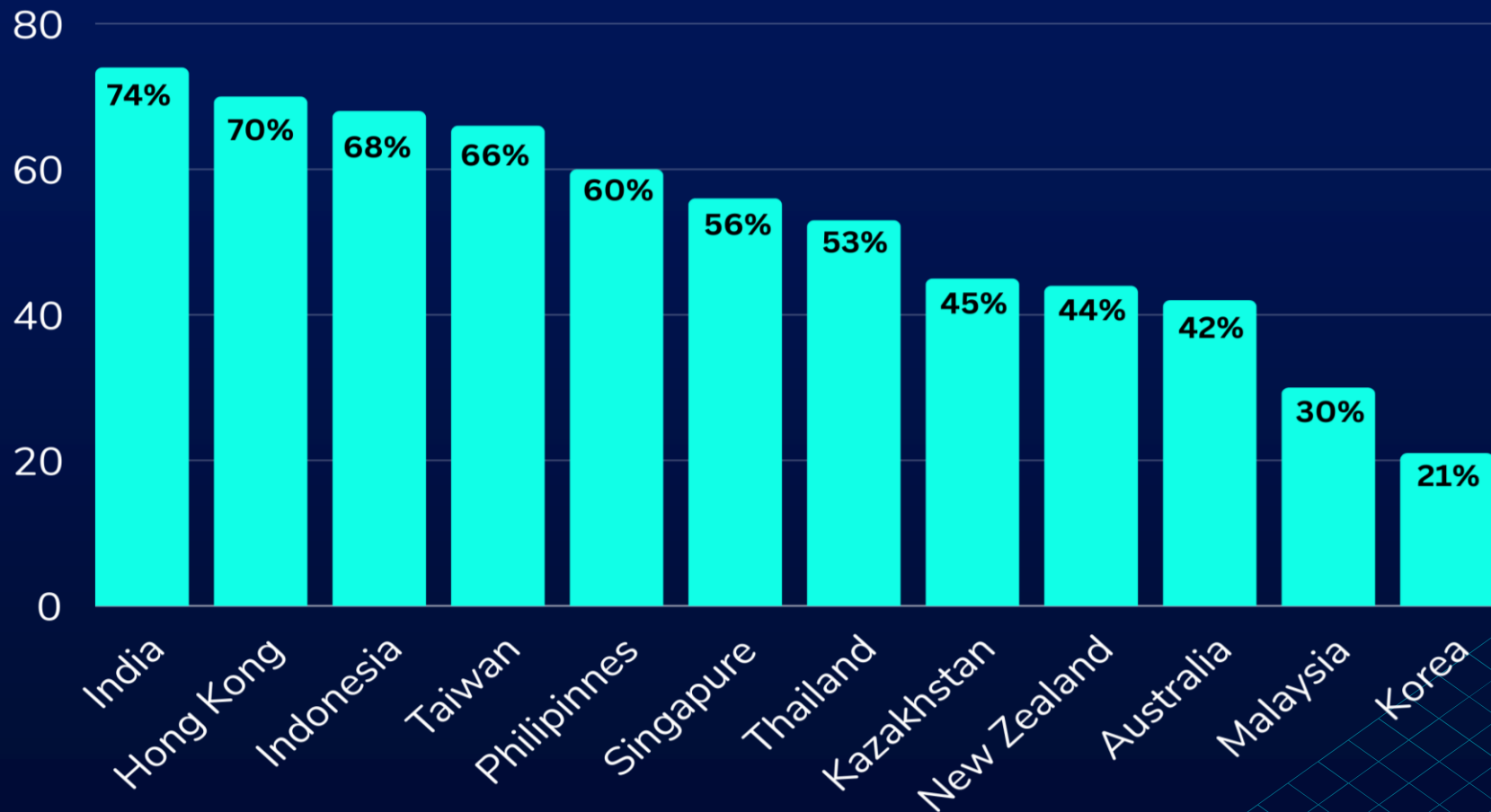
GENDER DISTRIBUTION ASIA PACIFIC DIRECT SELLERS



SHARE OF PRODUCT CATEGORIES ASIA PACIFIC



SHARE OF WELLNESS PRODUCT BY COUNTRY ASIA PACIFIC - 2023






DIRECT SELLING MIDDLE EAST & AFRICA



DIRECT SELLING IN MIDDLE EAST

Middle East has a total of 1,177,707 Active Direct Sellers

2023 SALES			2023 INDIVIDUALS ACTIVE IN DIRECT SELLING	
	LOCAL CURRENCY (MILLIONS)	USD (MILLIONS)	NUMBER	% OF WOMEN
ISRAEL 	227	62	15840	NA
UNITED ARAB EMIRATES 	110	30	938400	87%
OTHER MIDDLE EAST 		174	1177707	NA

Direct Selling Business Prospects in Middle East

Advantage Middle East

The Middle East, home to 381 million people, is the fastest-growing economic bloc globally.

While traditionally reliant on oil and natural gas, the region has seen transformative economic reforms in nations such as Bahrain, UAE, Qatar, and Saudi Arabia.

The UAE has demonstrated exceptional growth in its non-oil sectors.




Bahrain's economic performance exceeds both regional and global averages.

Saudi Arabia stands as one of the top 20 economies in the world, showcasing the region's evolving economic landscape.



DIRECT SELLING IN AFRICA

Africa has a total of 2,900,738 Active Direct Sellers

2023 SALES			2023 INDIVIDUALS ACTIVE IN DIRECT SELLING	
	LOCAL CURRENCY (MILLIONS)	USD (MILLIONS)	NUMBER	% OF WOMEN
MOROCCO 	868	86	182874	NA
SOUTH AFRICA 	8075	438	792260	87%
OTHER AFRICA 	NA	643	1925604	NA

DIRECT SELLING IN EUROPE

Europe Direct Selling Market Analysis
Performing Direct Selling Markets - Europe
Direct Selling in Europe: 2023 Retail Sales
Gender Distribution – European Union (Male/Female)
Rest of Europe
Gender Distribution – (Male/Female) – Rest of Europe
European Union – Product Category
Share in Wellness Products by Country in Europe

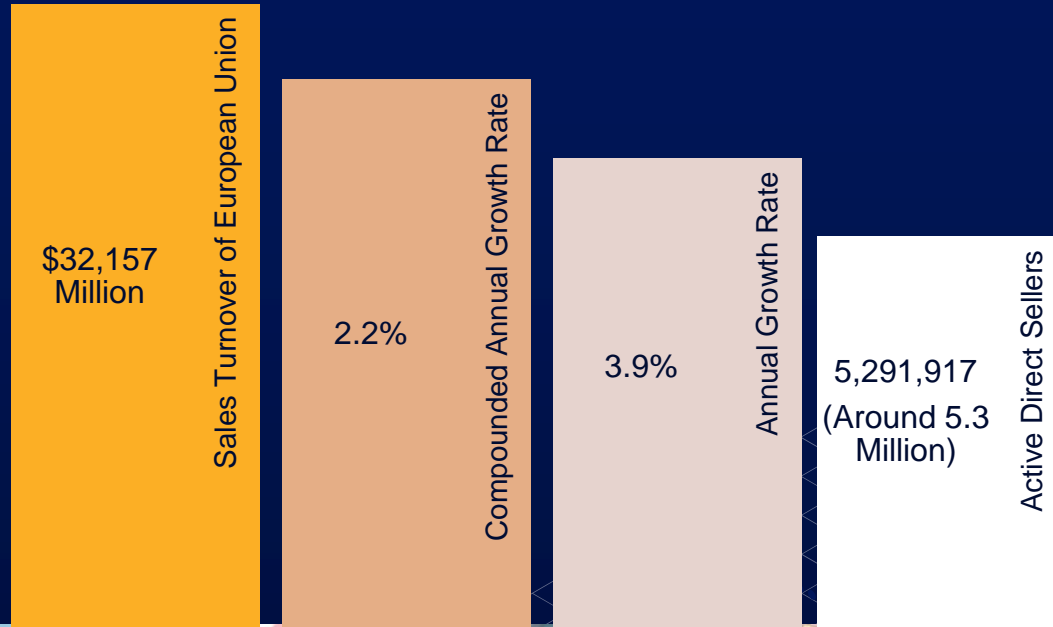
DIRECT SELLING IN EUROPE

European Union	27 Countries
Total Retail Sales	29712 Million (Euro)
Active Direct Sellers	5291917
Women Direct Sellers	78%

Rest of Europe	7 Countries
Total Retail Sales	33940 Million (Euro)
Active Direct Sellers	14465636
Women Direct Sellers	73%



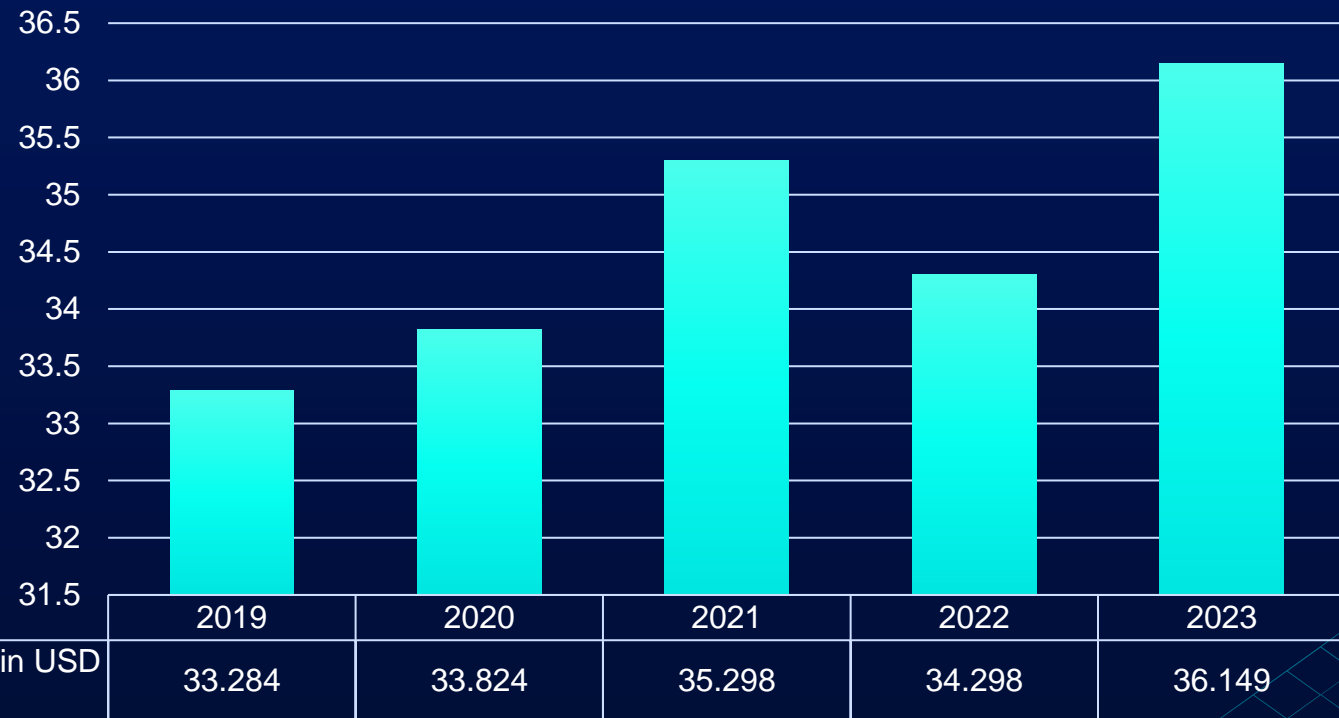
DIRECT SELLING IN EUROPE



EUROPE DIRECT SELLING MARKET ANALYSIS

Europe Retail Sales in USD (Millions)

The Direct Selling Industry in Europe demonstrates consistent Y-O-Y growth, with retail sales increasing by **8.6% between 2019 and 2023**



SALES GROWTH & SALES DIP

Sales Growth during the Pandemic:

1.6% increase in 2020, reaching to \$33,824 million.

4.4% increase in 2021, reaching to \$35,298 million.

Sales Dip:

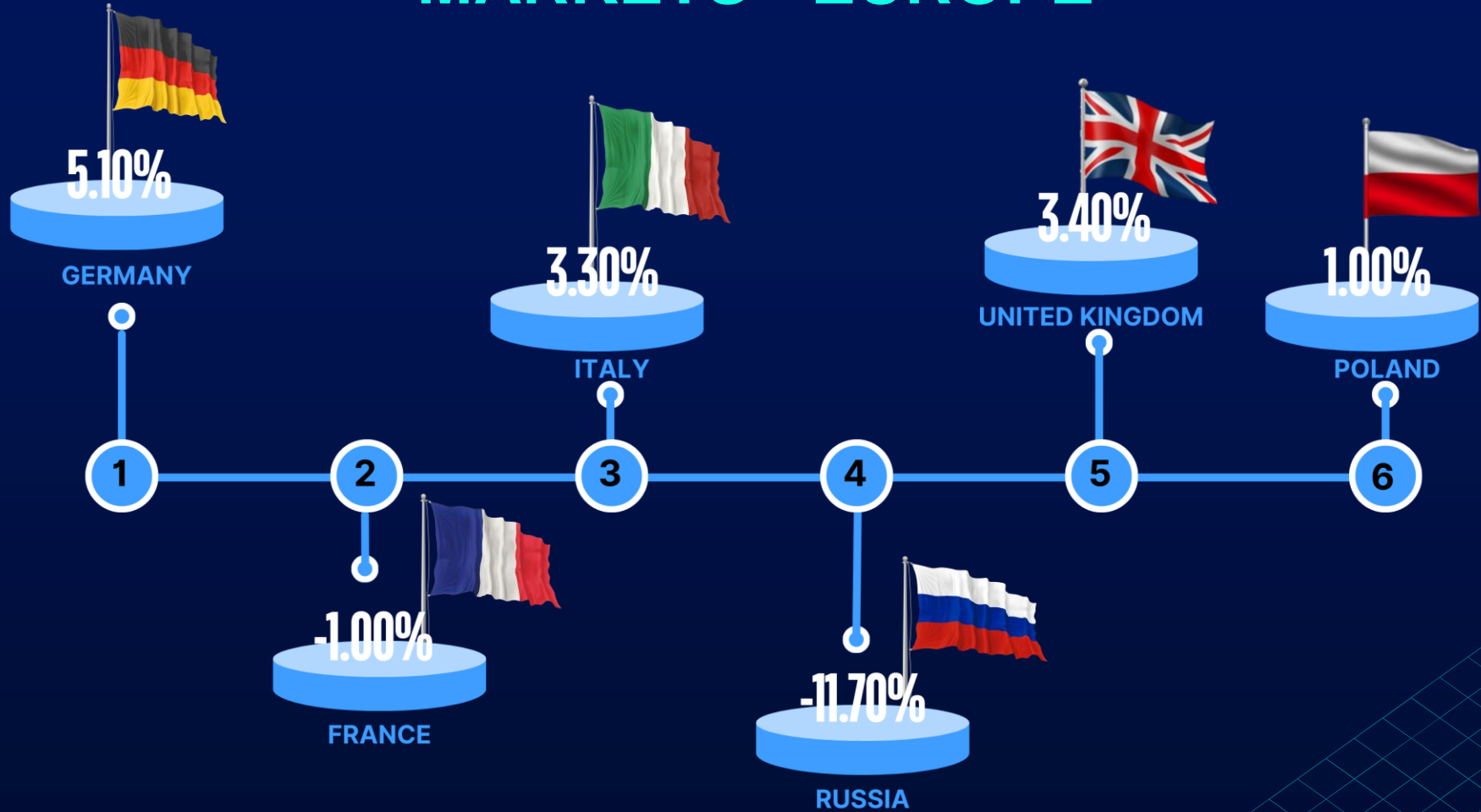
1.0% decline in 2022, to \$34,958 million.

Sales Surge:

3.4% increase in 2023, reaching to \$36,149 million.



PERFORMING DIRECT SELLING MARKETS - EUROPE



Growth Market Europe

Germany

Saw a 7.0% growth in direct sales, surpassing overall retail growth (up 2.9%) and online retail growth (up 1.3%),.

Germany accounted for 54.7% of direct selling in Europe.

Italy

- Achieved 3.3% CAGR Growth and a 0.3% Annual Growth
- Generating Sales Turnover of \$2,959 million

United Kingdom

- Recorded a +3.4% CAGR Growth experienced
- -10.0% decline in 2023
- Generating Sales Turnover of \$1,130 million

Europe Downward Sales Market

Russia

In 2023, Sales declined by 7.3 to \$1,266 million driven by lower consumer income and the rise of online sales

Decline was partially offset by steady demand for personalized communication with consumer based on trust, personal needs and loyalty

Growing interest in Asia beauty products , devices and locally manufactured personal care, homecare and wellness products.

France

Experienced -1.00% CAGR decline and 0.0% growth in FY 2023
Achieving a Sales Turnover of \$4,706 million

DIRECT SELLING IN EUROPE : 2023 RETAIL SALES

COUNTRIES	2023 SALES	2023 INDIVIDUALS ACTIVE IN DIRECT SELLING	
	EURO (MILLIONS)	NUMBER	% OF WOMEN
AUSTRIA	330	269337	NA
BELGIUM	200	19377	NA
BULGARIA	107	160652	NA
CROATIA	24	30035	NA
CYPRUS	6	8239	NA
CZECH REPUBLIC	380	310501	78%
DENMARK	77	55298	NA
ESTONIA	50	37800	90%
FINLAND	93	45171	83%
FRANCE	4352	700000	80%
GERMANY	18276	881772	NA
GREECE	88	61334	NA
HUNGARY	165	324025	NA
IRELAND	26	12974	81%
ITALY	2736	610000	71%
LATVIA	79	58410	90%
LITHUANIA	104	78770	91%
LUXEMBURG	35	2044	NA
MALTA	5	6414	NA
NETHERLANDS	113	84207	78%
POLAND	1011	671792	NA
PORTUGAL	173	181300	74%
ROMANIA	315	228348	NA
SLOVAKIA	163	174133	88%
SLOVAKIA	163	174133	NA
SPAIN	642	190428	82%
SWEDEN	134	70342	79%



European Billion Dollar Direct Selling Markets

Germany

Ranked 2nd Globally
With a CAGR of +5.1%
Turnover of \$19,761 Mn

France

Ranked 9th Globally
With a decline in CAGR of -1.0%
Turnover of \$4,706 Mn

Italy

Ranked 9th Globally
With a CAGR of +3.3%
Turnover of \$2,959 Mn

Russia

Ranked 19th Globally
With a decline in CAGR of -7.3%
Turnover of \$1,266 Mn

United Kingdom

Ranked 20th Globally
With a CAGR of +3.3%
Turnover of \$1,130 Mn

Poland

Ranked 21st Globally
Turnover of \$1,094 Mn



GROWING EUROPEAN MARKETS

Turkey

Achieved a CAGR Growth of +44.3% and an 81.3% Annual Growth
Generating a Sales Turnover of \$523 million

Switzerland

- Achieved a CAGR Growth of +1.0% and an 0.8% Annual Growth Generating Sales Turnover of \$431 million

Czech Republic

- Achieved a CAGR Growth of +4.0% and an 4.0% Annual Growth
- Generating Sales Turnover of \$410 million

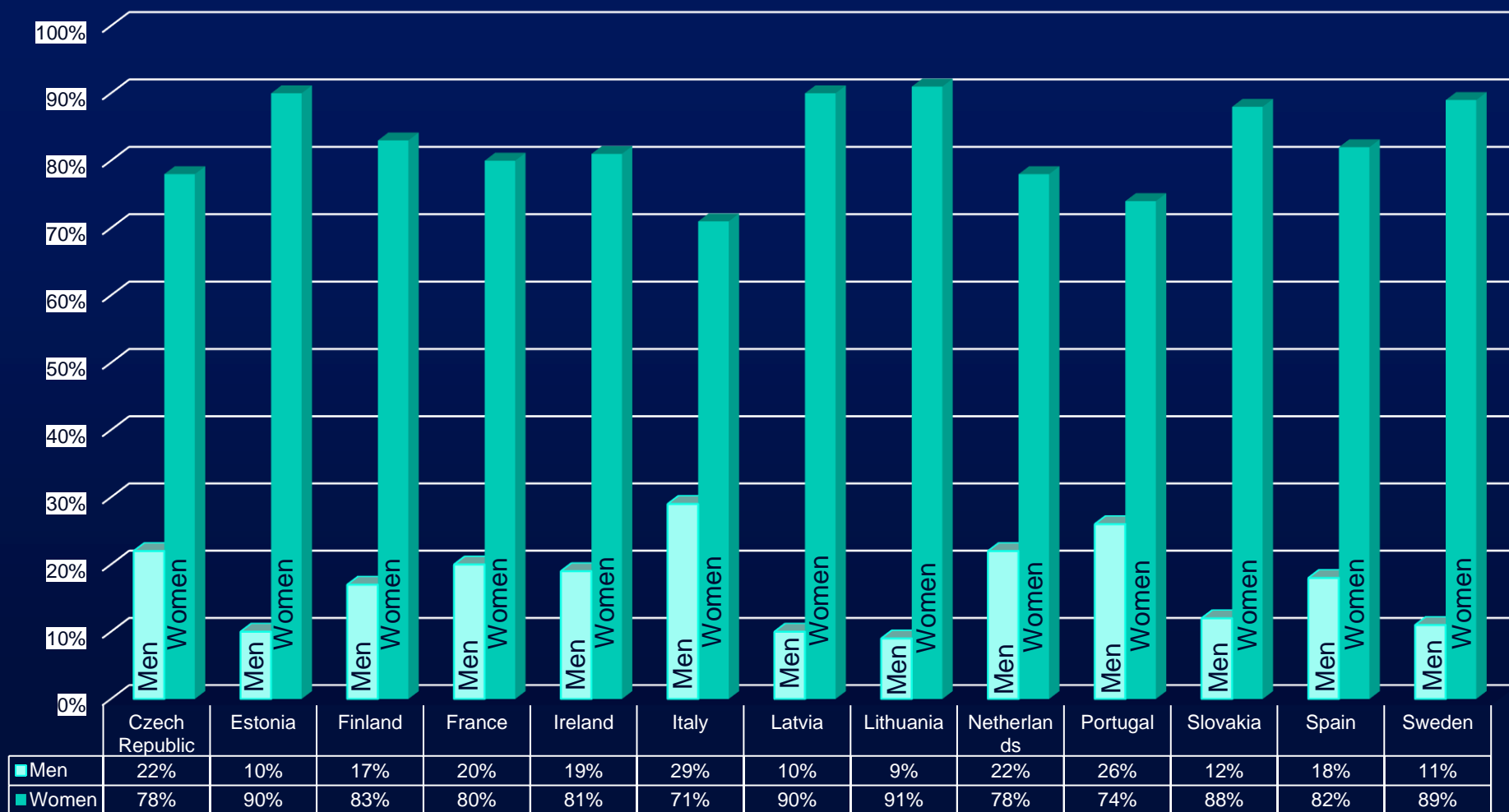
Austria

Achieved a CAGR Growth of +6.0% and an +3.8% Annual Growth
Generating Sales Turnover of \$357 million

Belgium

Achieved a CAGR Growth of +13.9% and an +2.9% Annual Growth
Generating Sales Turnover of \$216 million

EUROPE DIRECT SELLING : 2023 RETAIL SALES



REST OF EUROPE

Russia and the UK continue to experience downward sales trends

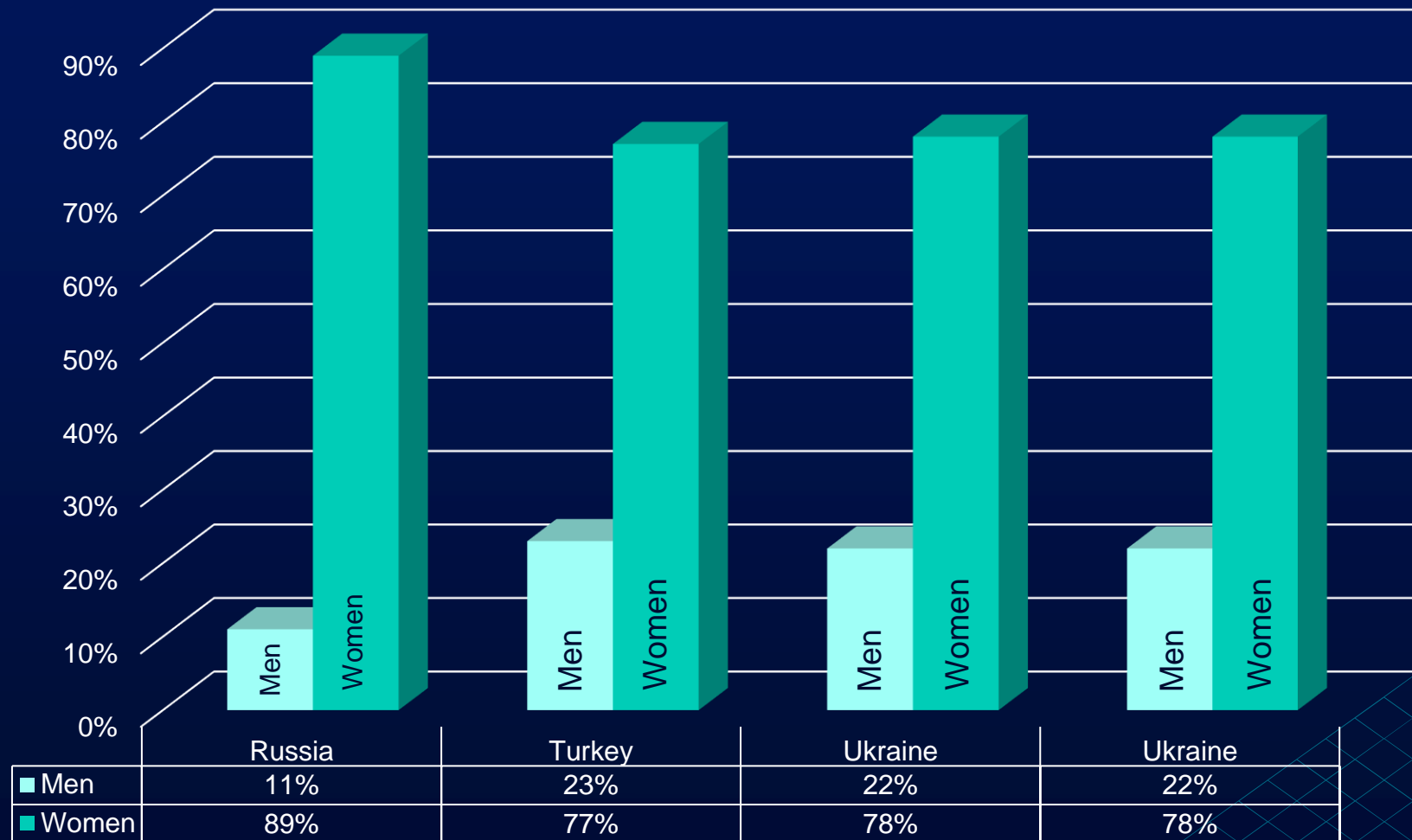
COUNTRIES	2023 INDIVIDUALS ACTIVE IN DIRECT SELLING		
	USD (MILLIONS)	NUMBER	% OF WOMEN
KAZAKHSTAN	655	1747228	16%
NORWAY	125	40208	NA
RUSSIA	1171	4622803	89%
SWITZERLAND	399	162644	NA
TURKEY	377	1355755	77%
UKRAINE	177	683461	78%
UK	1045	320127	78%

**Sales
Turnover**
\$ 4,022 million,
with a yearly
growth decline
of -0.3%

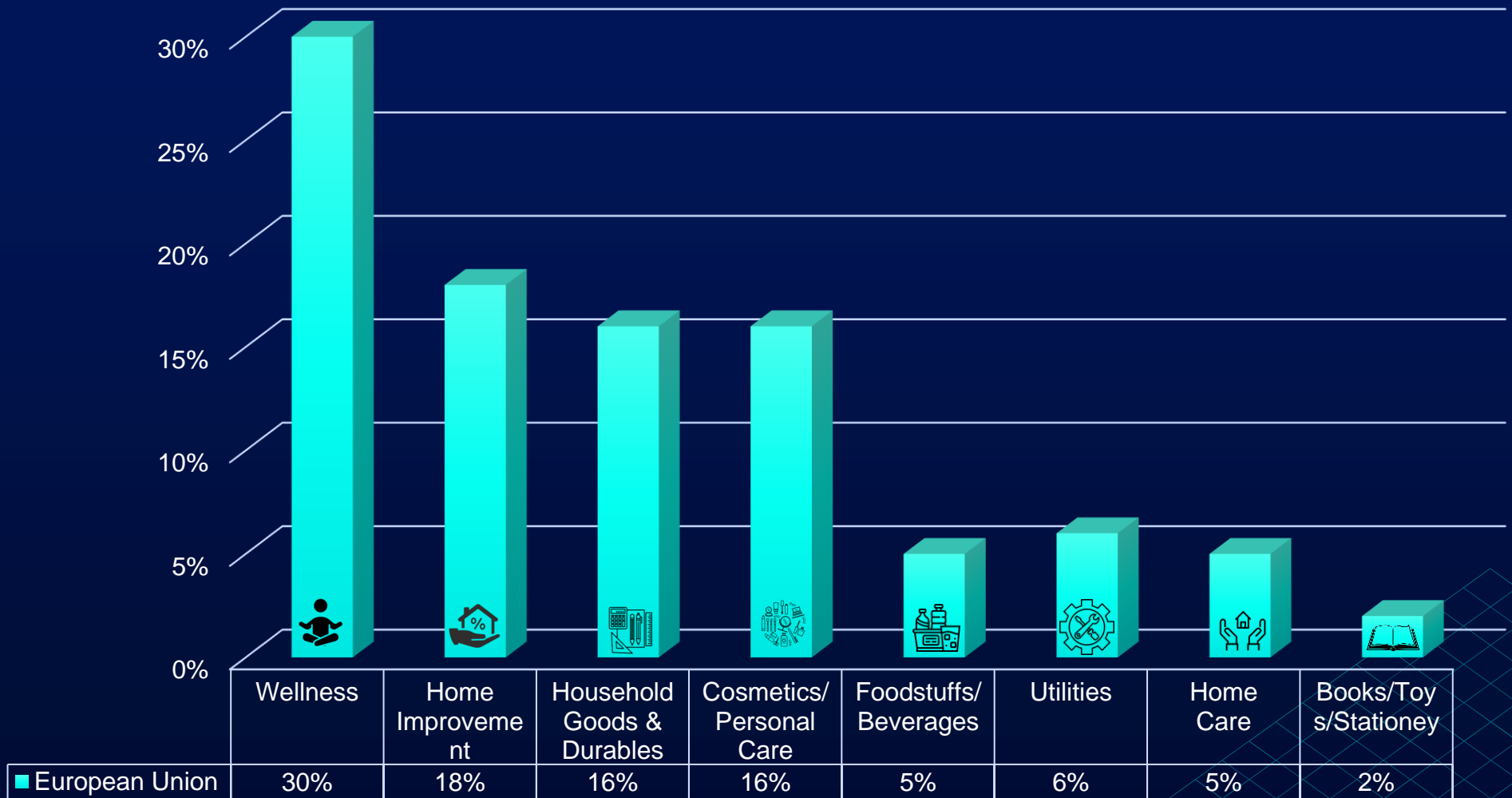
**Compounded
Annual
Growth Rate
(CAGR),
decrease by -
2.4%**

**Active Direct
Sellers :
7,426,491**

GENDER DISTRIBUTION – REST OF EUROPE



EUROPEAN UNION – PRODUCT CATEGORY



SHARE IN WELLNESS PRODUCTS BY COUNTRY IN EUROPE



DIRECT SELLING IN AMERICAS

Direct Selling in Americas

CAGR Growth of Leading Markets in the Americas

Direct Selling in North America

Gender Distribution (Male/Female) – North America

Direct Selling in South/Central America (LATAM)

Sales Performance of Americas (2019 – 2023)

Gender Distribution (Male/Female) – South America

Product Categories in Americas



DIRECT SELLING IN AMERICAS

Top Performing Markets

UNITED STATES

Ranked 1st Globally Recorded a declining CAGR of -2.9%, and a drop in Annual Sales by -9.5%
Reaching Annual Sales Turnover of \$36,660 million

BRAZIL

Ranked 7th Globally Recorded a declining CAGR of -2.0% and experienced increase in Annual Sales by +4.8%
Reaching Annual Sales Turnover of \$7,962 million

MEXICO

Ranked 8th Globally Recorded a CAGR Growth of +2.5% and experienced increase in Annual Sales by +3.0%
Reaching Annual Sales Turnover of \$6,874 million

COLUMBIA

Ranked 13th Globally Recorded a declining CAGR Growth of -8.5% and a drop in Annual Sales by -5.9%
Reaching Annual Sales Turnover of \$2,352 Mn

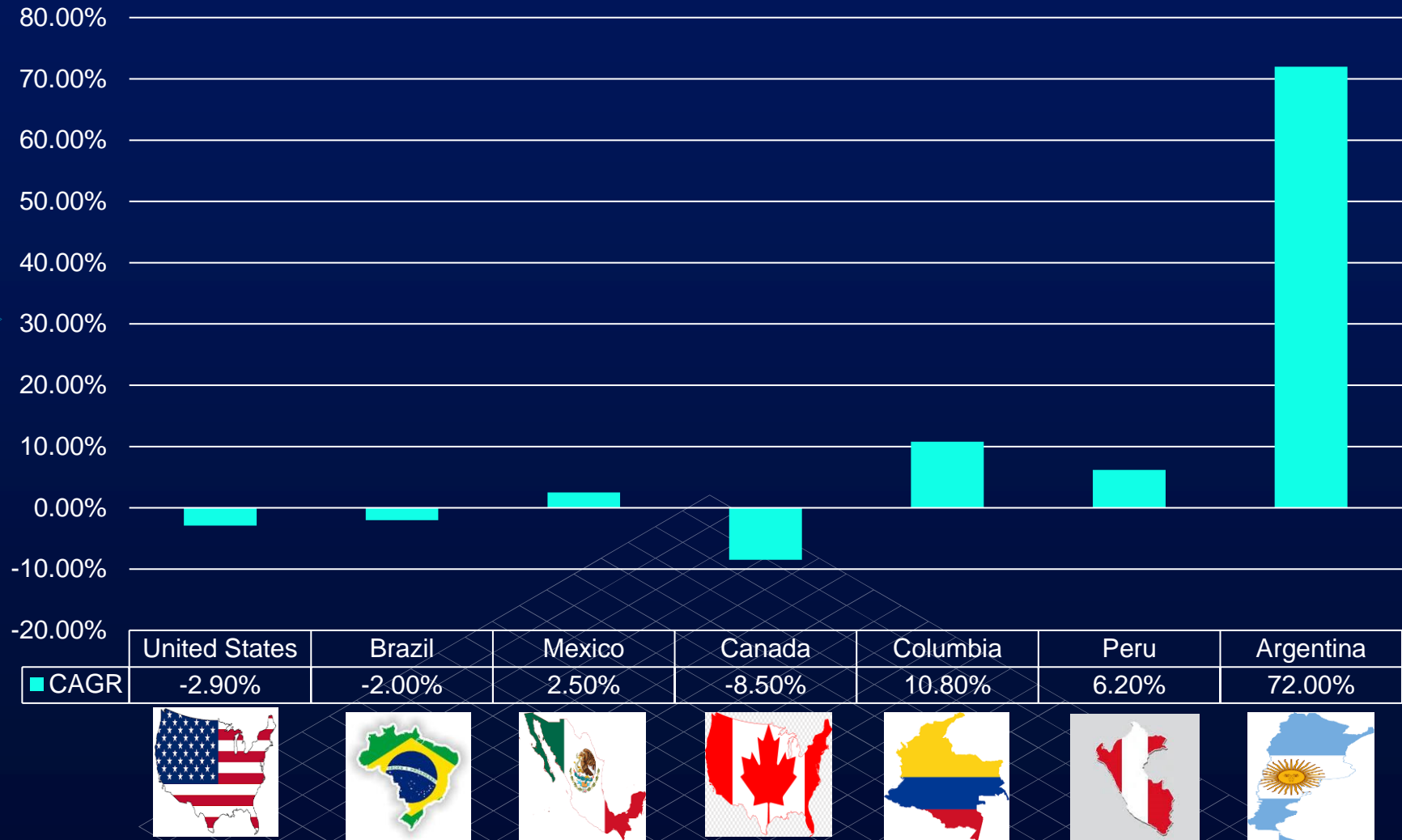
PERU

Ranked 16th Globally Recorded a CAGR Growth of +6.2% and experienced an increase in Annual Sales by 0.7%
Reaching Annual Sales Turnover of \$2,129 Mn



Poland

Ranked 21st Globally Turnover of \$1,094 Mn

CAGR GROWTH OF LEADING MARKETS IN THE AMERICAS



DIRECT SELLING IN NORTH AMERICA

Countries	2023 Sales	
	USD millions	% Sales changes with 2022
Canada 	3175	-5.90
United States 	36660	-9.50
Total	39012	-9.3%

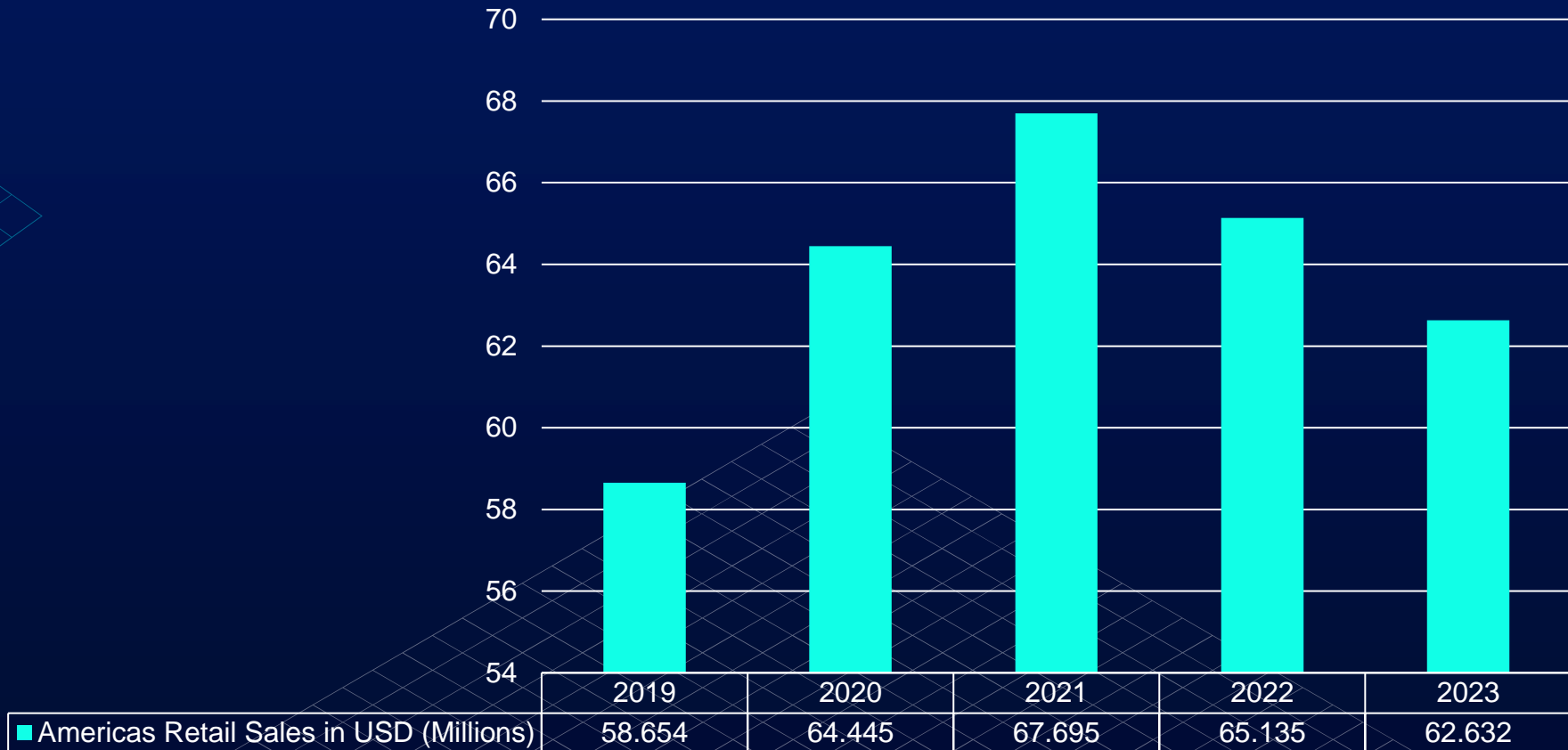
DIRECT SELLING IN SOUTH / CENTRAL AMERICA (LATAM)

South America has a total of 13,001,488 active direct sellers

COUNTRIES	2023 SALES	
	USD MILLIONS	% SALES CHANGES WITH 2022
Argentina	1778	+114.5%
Bolivia	351	+4.9%
Brazil	7962	+4.6%
Chile	503	-8.8%
Columbia	2312	0.4%
Ecuador	904	2.8%
Mexico	6874	3.0%
Peru	2129	-0.7%
Uruguay	48	-19.5%
Central America/ Caribbean	733	4.6%

SALES PERFORMANCE OF AMERICAS (2019 – 2023)

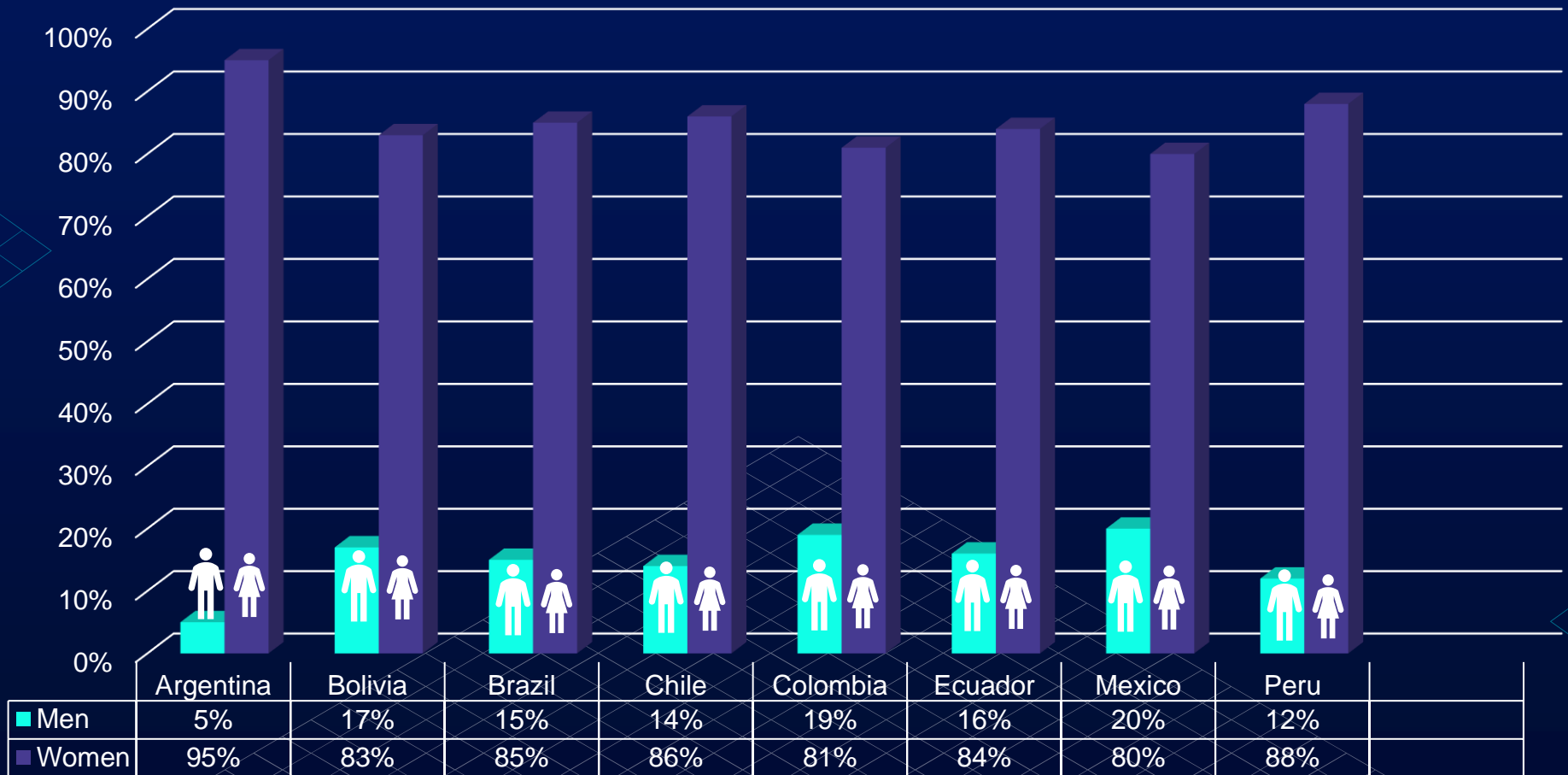
Americas Retail Sales in USD (Millions)



In 2023, the Americas recorded a sales turnover of \$62,632 million, with a -3.8% decline in Annual Sales.

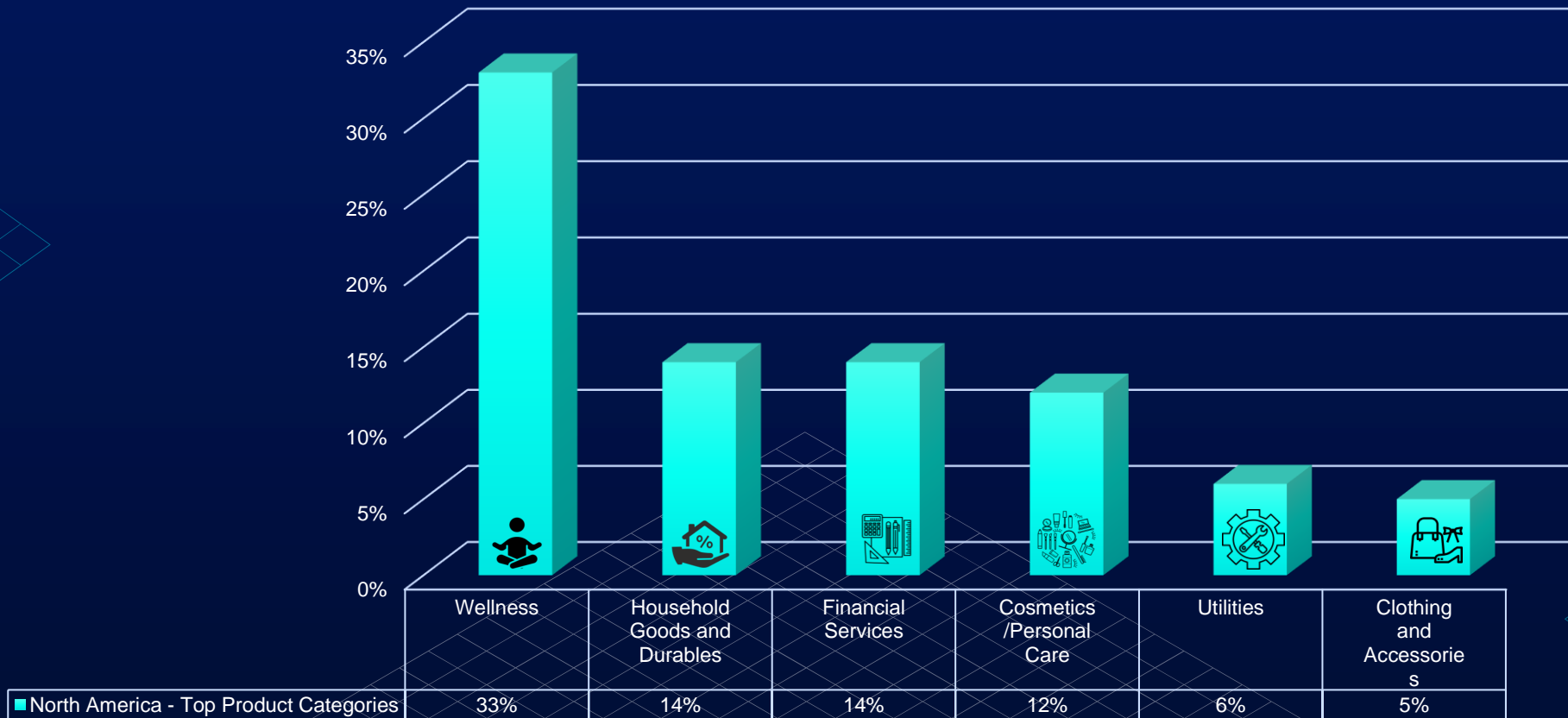
GENDER DISTRIBUTION (MALE/FEMALE)

SOUTH AMERICA



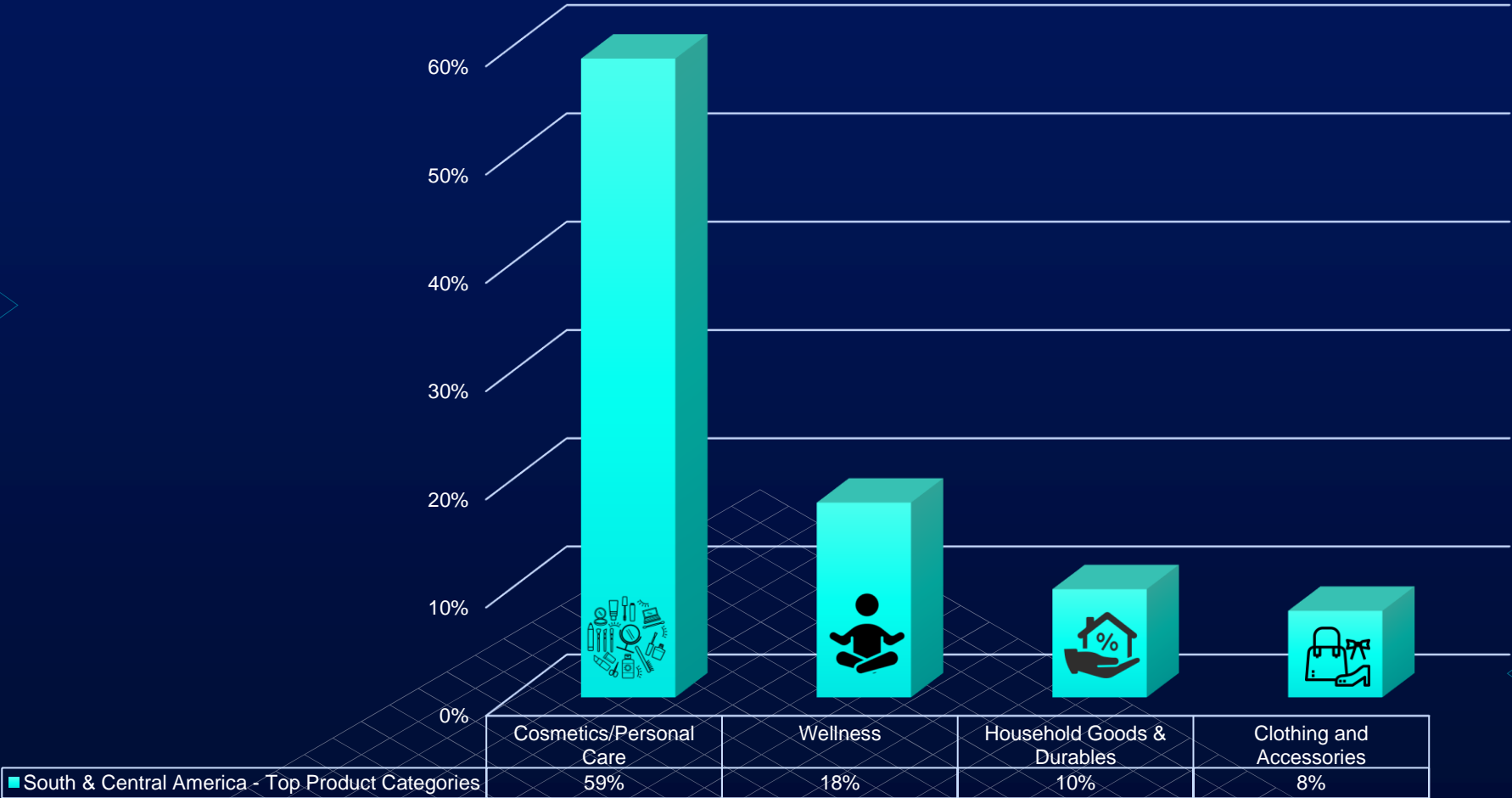
PRODUCT CATEGORIES IN AMERICAS

North America - Top Product Categories



Wellness overtook Cosmetics this year and reported Services revenue surpassed Wellness in the US. Household Goods and Durables fell slightly in popularity to 14 percent.

South & Central America -Top Product Categories



THANK YOU!



Compiled by EBS Consultancy Group
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Sources:

IDSA : (<https://idsa.co.in/annual-survey>)

WFDSA Statistics : (<https://wfdsa.org/global-statistics/>)

Media Reportings

