WFDSA STATS

2022 Global Annual Direct Selling Statistical Data Report

WFDSA
45 YEARS

August 2023

Foreword

The WFDSA STATS is an annual publication authored by the World Federation of Direct Selling Associations in close collaboration with its member Direct Selling Associations and the WFDSA CEO Council. WFDSA is the globally recognized source of credible information for the direct selling industry.

WFDSA STATS provides accurate, up-to-date statistical data to industry executives, general public, decision-makers, and other stakeholders. This comprehensive report offers insights to the global direct selling industry that helps to shape strategies, drive innovation, and foster growth.

WFDSA Editorial Team

Tamuna Gabilaia

Josephine Mills

Maureen Paniagua

Tim Sanson

Garth Wyllie

WFDSA
45 YEARS

Chairman's Message

Dear Colleagues,

I am thrilled to announce the launch of our latest initiative, the first edition of the WFDSA's annual Global Direct Selling Statistical Data publication. This comprehensive report provides invaluable insights into the performance, trends and impact of direct selling on a global scale.

This annual publication showcases global, regional, and country-specific results, including delving into the trends and dynamics of product categories. We believe this will be a powerful resource for all of you, offering a wealth of knowledge to support informed decision-making for your DSAs and all our member companies.

The Global Research Sub-Committee works hard every year to develop the data. This new publication, empowering our members with reliable statistical information would not be possible without their dedication and commitment. So, I take this moment to acknowledge the hard-working team that delivers this information to us annually.

I also wish to express my sincere appreciation to the heads of the Direct Selling Associations for working closely with WFDSA to make this publication a reality. Our collective collaboration has been pivotal in ensuring the accuracy and relevance of the data presented.

As we all know, statistics play a vital role in showcasing the significant contributions of direct selling to various economies and countries where we conduct business. Moreover, it is a powerful tool for our outreach efforts with external stakeholders.

As WFDSA chairman, I take great pride in the direct selling industry's strength, resilience and innovation.. Let us, together, reimagine, reinvent and redefine our industry as we navigate around and within the evolving challenges and opportunities.

Thank you all for your continued support.

Warm wishes,

Roger Barnett

In this issue

Industries rely on statistical data as a **vital guide,** shedding light on the route to **well-informed** decisions.

Executive Director's Message

My Dear Friends and Colleagues,

We are very excited to present our newest annual publication, WFDSA STATS. This achievement is the result of a collaborative effort that would not have been possible without all of you - our wonderful friends and colleagues from our member Direct Selling Associations, your member companies, and the WFDSA CEO Council. And of course, this achievement was made possible by our remarkable team that comprises the WFDSA Industry Research Committee.

Your support and insights have been instrumental in bringing WFDSA STATS to life. It's a testament to the strength of our global community.

As you explore the pages of WFDSA STATS, we hope you find valuable insights that inspire meaningful discussions within the industry and outside the industry to show the contributions that direct selling brings to society. This publication is a celebration of your hard work, insights, and commitment to direct selling.

A heartfelt thank you for all your contributions throughout the years. As our visionary Chairman Roger Barnett would say, let's continue our close collaboration so together we can Reimagine, Reinvent, and Redefine our industry and shape its future.

Warm regards,
Tamuna Gabilaia

Global Results Snapshot

As we analyzed the 2022 results, it became evident that the industry faced various challenges, but it also presented numerous positive opportunities. While both sales and sellers may have experienced some pressure, there was not a single clear reason for this. It is important to recognize that the gains seen during the pandemic, which created favorable conditions for direct sellers in many markets, have begun tapering off. However, we must also consider the impact of global inflation, which has presented opportunities for direct sellers, even though it's currently at levels not seen in decades.

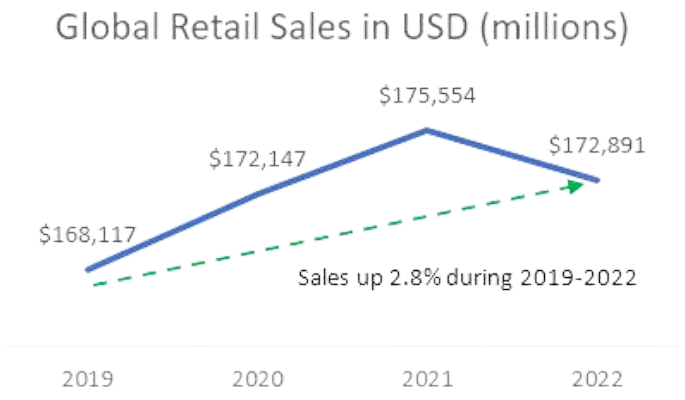
Another significant factor is the emergence of other income opportunities, which may have contributed to increased competition for traditional direct sellers.

The pandemic played a role in this, as it brought about a surge in home deliveries, leading to new income-generating possibilities, from delivering fast food to groceries and parcels, to providing ride-sharing services. Additionally, the rise of social media selling and affiliate marketing has opened up new avenues for content monetization.

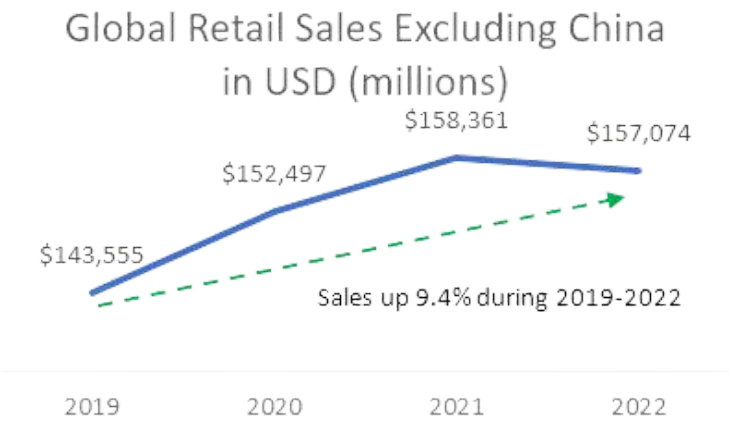
Despite these challenges and changes, direct sellers are known for their entrepreneurial spirit. According to Tim Sanson, Co-Chair of the WFDSA Research Sub-Committee, "The key to success in this evolving landscape is to adapt and find ways to stay relevant while offering immediate income streams that can grow over time."

Global Retail Sales

Global retail sales have shown steady growth over the past three years, with an estimated increase of 2.8 percent on a constant dollar basis or a 0.9 percent compound annual growth rate Compound Annual Growth Rate (CAGR) from 2019 to 2022. Notably, 2022 sales have surpassed both the pre-pandemic level of $168,117 million in 2019 and the sales of $172,147 million in 2020, the first year of the pandemic. While there was a slight dip in sales during 2022, with a decrease of 1.5 percent to $172,891 million from $175,554 million in 2021, the overall trend remains positive.



Furthermore, when excluding China from the global results, retail sales experienced even more impressive growth, jumping by 9.4 percent or at a 3.0 percent CAGR during the same three-year period from 2019 to 2022. Once again, 2022 sales surpassed the pre-pandemic level of $143,555 million in 2019 and the sales of $152,497 million in 2020. The decline in sales during 2022 was minimal, with a decrease of less than 1 percent (0.8 percent), amounting to $157,074 million from $158,361 million in 2021.



Overall, the global retail sales landscape has demonstrated resilience and positive growth during the above mentioned period, showcasing the industry's ability to adapt and flourish even amidst challenging circumstances

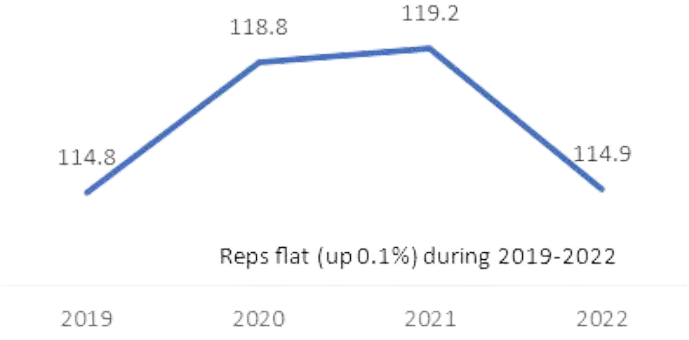
Independent Sales Representatives

Despite the challenges posed by the pandemic, there have been notable positive developments in the global independent sales representatives' landscape.

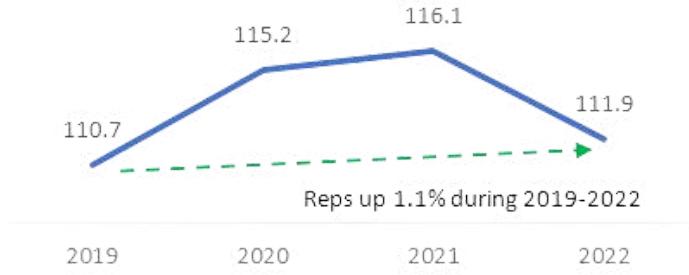
After climbing in 2020 to 118.8 million independent sales representatives and in 2021 to 119.2 million independent sales representatives during the first two years of the pandemic, the individual independent sales numbers essentially returned in 2022 to its pre-pandemic level in 2019: 114.9 million in 2022 vs. 114.8 million in 2019. Global sales force size fell 3.6 percent to 114.9 million people in 2022, down from 119.2 million in 2021.

Excluding China, after climbing in 2020 to 115.2 million and in 2021 to 116.1 million during the first two years of the pandemic, independent sales representative numbers retrenched in 2022 to 1.1 percent above its pre-pandemic level in 2019: 111.9 million in 2022 vs. 110.7 million in 2019. Global sales force size fell 3.6 percent to 111.9 million people in 2022, down from 116.1 million in 2021.

Global Sales Representatives (millions)



Global Sales Representatives Excluding China (millions)



Regional Sales Overview

In 2022, the Asia/Pacific region had retail sales of $71,509 million and accounted for 41.4 percent of global sales, followed by North America ($43,113 million, 24.9 percent share), Europe ($34,700 million, 20.1 percent share), South & Central America ($22,104 million, 12.8 percent share), Africa ($1,266 million, 0.7 percent share), and the Middle East ($199 million, 0.1 percent share).

Regionally, South & Central America had the highest sales growth in 2022 (up 2.5 percent), followed by Asia/Pacific (up 0.2 percent), Europe (down 1.1 percent), North America (down 6.0 percent), Africa (down 11.2 percent), and the Middle East (down 24.7 percent).

	Annual % Change	3-Year CAGR
	-1.5% ▼	+0.9% ▲
	-0.8% ▼	+3.0% ▲
Asia/Pacific	+0.2% ▲	-1.7% ▼
North America	-6.0% ▼	+4.5% ▲
European Union	+1.8% ▲	+1.6% ▲
South & Central America	+2.5% ▲	+3.1% ▲
Rest of Europe	-16.5% ▼	+1.7% ▲
Africa	-11.2% ▼	-6.8% ▼
Middle East	-24.7% ▼	-7.5% ▼

North America, however, had the best sales performance during 2019-2022 (up 4.5 percent CAGR), followed by South & Central America (up 3.1 percent CAGR), Europe (up 1.6 percent CAGR), Asia/Pacific (down 1.7 percent CAGR), Africa (down 6.8 percent CAGR), and the Middle East (down 7.5 percent CAGR).

Asia/Pacific

(CAGR)

- #2 Korea (+5.0%)
- #4 China (-13.6%)
- #5 Japan (-3.6%)
- #6 Malaysia (+9.8%)
- #10 Taiwan, China (+3.1%)
- #11 India (+13.3%)
- #15 Thailand (-5.1%)
- #19 Indonesia (-2.2%)
- #21 Vietnam (+19.3%)
- #22 Australia (+1.0%)
- #23 Philippines (-5.1%)

11 of the 24 Billion Dollar Markets are in Asia/Pacific

The Asia/Pacific Region posted estimated retail sales of $71,509 million in 2022, essentially the same (up 0.2 percent) as in 2021 and a negative three-year CAGR of 1.7 percent. Removing China, sales were $55,691 million, up 2.8 percent from 2021 and a positive three-year CAGR of 3.1 percent. The China market has faced several consecutive years of challenging conditions. China experienced ongoing widespread lockdowns in 2022 under the government's Zero COVID policy which resulted in sales decline of 8 percent in 2022. Just as lockdowns were being eased, the global economy slowdown has potentially ushered a new wave of headwinds for the China industry.

Seven of the sixteen markets in the region grew during 2022, compared to nine of 16 during the three-year period 2019-2022. Six markets (Korea 7.4%, Malaysia 5.6%, India 5.4%, Vietnam 11.7%, Kazakhstan 28.2%, Singapore 13.9%) grew both in 2022 and during the three-year period.

◆ Rank constant vs 2021 ▼ Rank lower than 2021 ▲ Rank higher than 2021

A Closer Look by Region: Asia/Pacific

According to the DSA of Taiwan, China, the industry did not exhibit any signs of decline, and member companies maintain a positive and optimistic outlook for the future development of the industry.

"Members acknowledge that sales in the previous two years during the pandemic were exceptionally high, with double-digit percentage increases. In 2022/2023, the market is experiencing a correction back to pre-pandemic sales levels, with single-digit percentage increments expected. Nonetheless, the overall growth is still positive. Members anticipate a return to a more normalized pattern while recognizing the enduring effects of the pandemic."
- Lawrence Cheah, Executive Director of the Malaysian Direct Selling Association

There were 8 markets in the Asia/Pacific region which experienced drop in sales. Jeoff Mulham, President of the Australian DSA notes that its members recognize that the general economy also experienced a downturn, which helps them understand that they are not alone in facing these challenges. While some post-pandemic cyclic events are slowly normalizing, members anticipate another 12-24 months of challenging conditions before they can witness a significant upward trajectory. In Thailand, most companies saw a drop in sales due to the virus and its effects on the economy and the way people shop.

"Despite decrease in sales, many companies have responded by quickly adapting to new trends and making good use of tools like social media, digital marketing, and online marketplaces"
~ Sukanda Chunhachatrachai, head of DSA of Thailand

Korea's 2022 sales of $18,475 million accounted for 26 percent of the region's sales and China's sales of $15,818 for another 22 percent. Nine other markets in the region had annual sales of $1 billion or more in 2022.

		Annual % Change	3-Year CAGR
71,509	Asia/Pacific	+0.2% ▲	-1.7% ▼
55,691	Asia/Pacific (Excluding China)	+2.8% ▲	+3.1% ▲
Annual Retail Sales in USD (millions)			
18,475	Korea	+7.4% ▲	+5.0% ▲
15,818	China	-8.0% ▼	-13.6% ▼
11,616	Japan	-2.3% ▼	-3.6% ▼
8,634	Malaysia	+5.6% ▲	+9.8% ▲
4,582	Taiwan, China	0.0%	+3.1% ▲
3,230	India	+5.4% ▲	+13.3% ▲
2,282	Thailand	-6.0% ▼	-5.1% ▼
1,424	Indonesia	-3.8% ▼	-2.2% ▼
1,223	Vietnam	+11.7% ▲	+19.3% ▲
1,214	Australia	-7.8% ▼	+1.0% ▲
1,192	Philippines	-2.3% ▼	-5.1% ▼
493	Kazakhstan	+28.2% ▲	+18.5% ▲
485	Singapore	+13.9% ▲	+9.8% ▲
370	Other Asia/Pacific	-10.6% ▼	+11.3% ▲
358	Hong Kong, China	-5.7% ▼	-2.0% ▼
113	New Zealand	+3.6% ▲	-5.3% ▼

Americas

7 of the 24 Billion Dollar Markets are in the Americas

(CAGR)

- #1 United States (+4.8%)
- #7 Brazil (-0.2%)
- #8 Mexico (+0.8%)
- #13 Canada (+0.8%)
- #14 Colombia (+10.5%)
- #16 Peru (+0.2%)
- #17 Argentina (+65.3%)

The Americas experienced a positive three-year CAGR of 4.0 percent from 2019 through 2022, although estimated retail regional sales in 2022 are down 3.2 percent from prior year. With full year estimated sales of $65,217 million, the region is still experiencing healthy and robust business activity.

Three of 13 markets grew in 2022, compared to eight of 13 during 2019-2022. Three markets (Mexico 1%, Colombia 7.9%, Argentina 58.1%) grew both in 2022 and during the three-year period 2019-2022.

In 2022, the United States Direct Selling Association reported sales in excess of $40 billion. U.S. Sales accounted for 62 percent of the sales in the Americas and 23 percent of the total direct selling sales worldwide.

Per the USDSA, direct selling fared better than some sectors and not as well as other sectors resulting from numerous factors, but what is clear is that direct selling revenue remains higher than the levels reported pre-pandemic in 2019. This is an important indicator of the vibrancy and resilience of the direct selling channel. Not unlike the economy in general, direct selling is still adjusting to the buying patterns and consumer expectations patterns in the post-pandemic economy.

Brazil, the second largest market in the Americas is flat or close to flat for both 2022 and for the three-year (pre-pandemic / post-pandemic) time period. According to Adriana Colloca, President of the Brazilian DSA, direct selling companies in Brazil faced competition from the growing e-commerce sector and affiliated programs like Amazon, Mercado Livre, and other digital sales platforms.

Rank constant vs 2021 | Rank lower than 2021 | Rank higher than 2021

A Closer Look by Region: Americas

65,217	Americas	-3.2%	+4.0%
Annual Retail Sales in USD (millions)		Annual % Change	3-Year CAGR
40,520	United States	-5.0%	+4.8%
7,362	Brazil	0.0%	-0.2%
5,888	Mexico	+1.0%	+0.8%
2,593	Canada	-18.4%	+0.8%
2,340	Colombia	+7.9%	+10.5%
2,092	Peru	-1.7%	+0.2%
1,881	Argentina	+58.1%	+65.3%
881	Ecuador	-1.0%	-8.7%
701	Central America/Caribbean	-4.3%	-0.5%
530	Chile	-31.6%	+3.3%
334	Bolivia	-11.4%	-0.5%
67	Uruguay	-7.2%	-3.6%
28	Other South & Central America	-10.0%	+0.1%

In Canada, the retail industry faced a particularly difficult year due to high inflation and rising interest rates, which negatively impacted consumer spending and retail sales. "For the direct selling sector, the impact was even more pronounced, as the robust employment levels during the year led to fewer people seeking secondary income opportunities" noted Peter Maddox, President, Direct Selling Association of Canada. While Canada is slightly positive (+.8%) for the 3-year period, 2019 – 2022, retail sales for the year 2022 are down by 18.4 percent. This is a year of disappointment in sales and recruitment for many DSA members. But despite the ups and downs, Canada's 2022 numbers surpassed those of the pre-pandemic "normal" year in 2019, providing some positive news to industry members.

Argentina experienced significant increases both on a 2022 vs 2021 comparison (+58.1%) and for the 3-year CAGR (+65.3%). But it important to note the inflation rate for Argentina during 2022 was determined to be 94.8 percent. "Despite the macroeconomic situation, the future of the industry in Argentina remains promising." stated Gonzalo Falcon, Executive Director of the Argentinian DSA.

In Ecuador, despite a slight drop in sales, direct selling companies showcased resilience and adaptability. Per Maria Fernanda Leon Moreno, the Executive Director of the Ecuadoran DSA, "Companies implemented changes in supply chain management, assumed responsibilities for direct product delivery to customers, and provided training on utilizing digital tools. Those who embraced these transformations experienced growth while those who clung to traditional approaches fell behind".

In total, the Americas has 7 markets with sales above $1 Billion - United States, Brazil, Mexico, Canada, Colombia, Peru, and Argentina.

Snapshot of Direct Selling in the United States

	2020	2021	2022	Trend
Retail Sales				
Amount in USD (mil.)	$40,100	$42,670	$40,520	
% Change	13.9%	6.4%	-5.0%	
Global Share	23.3%	24.3%	23.4%	
3-Year CAGR (2019-2022)			4.8%	
Sales Force				
Number of Reps	16,670,000	16,200,000	14,600,000	
% Change	1.9%	-2.8%	-9.9%	
Global Share	14.0%	13.6%	12.7%	
3-Year CAGR (2019-2022)			-3.7%	

Clothing & Accessories	5.0%
Cosmetic & Personal Care	10.7%
Home Care	1.5%
Household Goods & Durables	13.6%
Wellness	34.7%
Books, Toys, Stationary, Etc.	2.8%
Foodstuffs & Beverages	1.1%
Home Improvement	0.0%
Utilities	6.6%
Financial Services	12.7%
Other	11.3%

Europe

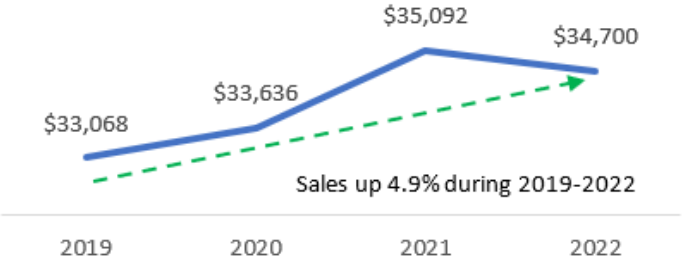
6 of the 24 Billion Dollar Markets are in Europe

(CAGR)

- #3 Germany (+3.1%)
- #9 France (-2.0%)
- #12 Italy (+1.2%)
- #18 Russia (-7.3%)
- #20 United Kingdom (+21.2%)
- #24 Poland (+2.8%)

Accounting for 20.1 percent of global sales in 2022, European retail sales showed growth over the past three years, with an increase of 4.9 percent or a 1.6 percent CAGR from 2019 to 2022. It is noteworthy that 2022 sales are above both the pre-pandemic level of $33,068 million in 2019 and the sales of $33,636 million in 2020, the first year of the pandemic. There was a small decrease in sales of 1.1 percent in 2022 to $34,700 million, from $35,092 million in 2021, but the trend is upward.

Europe Retail Sales in USD (millions)



Among the 34 markets in Europe, 17 or one-half grew during 2019-2022 and four markets in 2022. And these four markets — Germany, Italy, Turkey, and Austria — also experienced sales growth in both 2022 and the three-year period.

In 2022, Germany was the largest market in Europe with sales of $17,986, accounting for more than one-half (51.8 percent) of European sales. Sales increased 6.6 percent in 2022 and 3.1 percent CAGR during 2019-2022. In Germany, DSA members had varying experiences. While some reported a robust performance, others found the year more challenging. On the whole, however, sales across the membership base remained steady.

"With 6 markets greater than $1 Billion in this Region, Germany continues to dominate the European Industry". ~Tim Sanson

Rank constant vs 2021 ▼ Rank lower than 2021 ▲ Rank higher than 2021

A Closer Look by Region: Europe

According to the German DSA, as the economic landscape continues to evolve, member companies have been cautious and have kept a close eye on the economy, ready to adapt their strategies as necessary. Global political tensions, coupled with an energy crisis and supply chain disruptions, certainly made the past year particularly challenging. Yet, DSA members navigated these difficulties with self-assurance, maintaining their operations and ensuring their businesses remained on course.

Following Germany with 13.2 percent of European sales, France is the second largest market in Europe and is one of 6 markets in the region with sales over $1 billion. Sales decreased 5.0 percent in 2022 and 2.0 percent CAGR during 2019-2022. No specific product categories stood out as performing significantly better or worse than the general trend, except for the home improvement category which showed a relatively stronger performance. “Despite the challenges, the industry demonstrated resilience and adaptability. Direct selling companies showed creativity and energy in overcoming the consequences of the pandemic.

In comparison to the decline in e-commerce sales, which decreased by 7.5 percent in 2022, the direct selling sector fared relatively well with a 5 percent decrease. This suggests that companies managed the situation effectively considering the economic context” Frederic Billon, Secretary General of the French Direct Selling Association notes.

After France are four more markets with 2022 sales over $1 billion: Italy (2022 sales of $2,891 million, 8.3 percent of European sales, 1.2 percent CAGR), Russia, (2022 sales of $1,698 million, 4.9 percent of European sales, -7.3 percent CAGR), the United Kingdom (2022 sales of $1,245 million, 3.6 percent of European sales, +21.2 percent CAGR) and Poland (2022 sales of $1,031 million, +2.8 percent CAGR). Per Janusz Potoczny, Executive Director of the Polish DSA, "The direct selling industry in Poland faced a range of difficulties in 2022 due to external conditions such as inflation and the conflict in Ukraine. Some companies offering cosmetics experienced sales declines, while others showed excellent results due to the adaptability of their consultants in hybrid work models. Overall, the industry coped well with the difficulties they faced."

The remaining 28 markets in Europe account for 15.2 percent of regional sales in 2022. Among these 28 markets, the average sales change was -10.2 percent in 2022 and -1.1 percent CAGR during 2019-2022

34,700 **Europe** -1.1% +1.6%

Annual Retail Sales in USD (millions)		Annual % Change	3-Year CAGR
17,986	Germany	+6.6% ▲	+3.1% ▲
4,583	France	-5.0% ▼	-2.0% ▼
2,891	Italy	+3.9% ▲	+1.2% ▲
1,698	Russia	-22.6% ▼	-7.3% ▼
1,245	United Kingdom	-21.0% ▼	+21.2% ▲
1,031	Poland	-6.8% ▼	+2.8% ▲
725	Spain	-12.5% ▼	-2.9% ▼
539	Turkey	+33.1% ▲	+20.2% ▲
408	Other Europe	-15.4% ▼	-3.8% ▼
402	Switzerland	-6.1% ▼	+5.1% ▲
389	Czech Republic	-9.1% ▼	+6.4% ▲
351	Romania	-3.1% ▼	-3.3% ▼
335	Austria	+0.6% ▲	+7.7% ▲
211	Portugal	-19.6% ▼	-1.4% ▼
185	Belgium	-9.6% ▼	+0.2% ▲
176	Hungary	-5.9% ▼	+3.1% ▲
175	Sweden	-13.4% ▼	-6.1% ▼

Annual Retail Sales in USD (millions)		Annual % Change	3-Year CAGR
173	Slovakia	-10.8% ▼	-0.6% ▼
167	Norway	-12.4% ▼	+1.0% ▲
159	Ukraine	-38.0% ▼	-17.1% ▼
125	Netherlands	-12.3% ▼	+0.3% ▲
107	Lithuania	-6.0% ▼	+4.8% ▲
105	Finland	-11.8% ▼	-10.0% ▼
89	Greece	-18.4% ▼	-8.1% ▼
87	Bulgaria	-4.5% ▼	+0.4% ▲
85	Denmark	-1.0% ▼	+0.2% ▲
82	Latvia	-8.0% ▼	+4.7% ▲
52	Estonia	-8.0% ▼	-0.4% ▼
40	Luxembourg	-5.3% ▼	-3.3% ▼
32	Croatia	-18.6% ▼	-7.6% ▼
26	Ireland	-10.7% ▼	-6.5% ▼
26	Slovenia	-2.8% ▼	+5.9% ▲
7	Cyprus	-20.1% ▼	-4.2% ▼
6	Malta	-34.8% ▼	-15.5% ▼

A Closer Look by Region

Africa/ Middle East

Estimated retail sales in Africa/Middle East were $1,466 million in 2022, accounting for one percent of global sales. Sales were down 13.3 percent in 2022 and a negative 6.9 percent CAGR during the three-year period 2019-2022.

In 2022, the UAE had flat sales versus prior year, while the other five markets in the region experienced a decline in sales. Only one of six markets (the UAE) had a positive three-year CAGR.

1,466 Africa/Middle East -13.3% -6.9%

Annual Retail Sales in USD (millions)

		Annual % Change	3-Year CAGR
598	Other Africa	-4.7%	-6.5%
569	South Africa	-17.1%	-7.2%
102	Other Middle East	-38.1%	-13.8%
99	Morocco	-11.6%	-6.3%
68	Israel	-3.6%	-3.9%
29	United Arab Emirates	0.0%	+25.0%

United Arab Emirates experienced significant 3-year growth of 25 percent

Top Markets

in Excess of $1 Billion, USD

In 2022, 24 markets had sales of $1 billion or more, the same number as in 2021. And the names of these 24 markets also remained the same. The rankings of markets in the top ten in 2022 are unchanged from 2021.

Rank	Market	Rank vs 2021	2022 Retail Sales in USD (millions)	2022 vs 2021 (2022 Constant USD)	3-Year CAGR (2022 Constant UDS)
1	United States		$40,520	-5.0%	4.8%
2	Korea		$18,475	7.4%	5.0%
3	Germany		$17,986	6.6%	3.1%
4	China		$15,818	-8.0%	-13.6%
5	Japan		$11,616	-2.3%	-3.6%
6	Malaysia		$8,634	5.6%	9.8%
7	Brazil		$7,632	0.0%	-0.2%
8	Mexico		$5,888	1.0%	0.8%
9	France		$4,583	-5.0%	-2.0%
10	Taiwan		$4,582	0.0%	3.1%
11	India	▲	$3,230	5.4%	13.3%
12	Italy	▲	$2,891	3.9%	1.2%
13	Canada	▼	$2,593	-18.4%	0.8%
14	Colombia	▲	$2,340	7.9%	10.5%
15	Thailand	▼	$2,282	-6.0%	-5.1%
16	Peru		$2,092	-1.7%	0.2%
17	Argentina	▲	$1,881	58.1%	65.3%
18	Russia	▼	$1,698	-22.6%	-7.3%
19	Indonesia		$1,424	-3.8%	-2.2%
20	United Kingdom	▲	$1,245	-21.0%	21.2%
21	Vietnam	▲	$1,223	11.7%	19.3%
22	Australia	▼	$1,214	-7.8%	1.0%
23	Philippines	▼	$1,192	-2.3%	-5.1%
24	Poland	▼	$1,031	-6.8%	2.8%

2022 Product Insights:
Exploring Product Categories

A well trained and motivated sales force is nothing without great products

Global Overview: Products and Services

In 2022, Wellness, the largest product/service category by sales, accounted for nearly one-third (30%) of global sales. Cosmetics and personal care (23%) and household goods/durables (15%) were the next two largest categories. Together, these three categories accounted for more than two-thirds (68%) of global sales.

The relationship of product categories to overall product sales remains fairly consistent year over year in the data collected by WFDSA

Share of Product Categories by Region

Wellness

Versus the global share for this category of 30 percent, Asia/Pacific shows strength in this product category with wellness representing 42 percent of all sales in that Region, and Europe representing sales of 18 percent in this category.

Cosmetic & Personal Care

Compared to the global share of 23 percent, the Americas are overrepresented with 27 percent, and Europe is underrepresented with 15 percent.

Household Goods & Durables

Versus the global share of 15 percent, Asia/Pacific is overrepresented with 20 percent, and Europe is underrepresented with 12 percent.

Share of Product Categories by Region

The shares of categories also differ by market. Home improvement, for example, has a 33 percent share in France, but only a 3 percent share globally. Utilities have a 13 percent share in Germany, but a 4 percent share globally. Looking again at Germany, wellness products account for 8 percent of sales in the country, versus 30 percent globally.

Sales Shares in 2022 by Region

Category	Global	Asia/Pacific	Americas	Europe
Wellness	30.3%	41.9%	28.9%	17.5%
Cosmetic & Personal Care	22.6%	21.2%	26.9%	15.2%
Household Goods & Durables	14.9%	20.0%	12.9%	11.9%
Other Products & Services	5.7%	2.4%	7.1%	6.7%
Financial Services	4.8%	0.0%	8.0%	4.6%
Clothing & Accessories	4.3%	1.1%	6.3%	4.4%
Utilities	4.0%	0.6%	4.3%	8.2%
Books, Toys, Stationary, Etc.	3.6%	5.7%	1.9%	4.5%
Foodstuffs & Beverages	3.6%	4.3%	1.2%	7.8%
Home Care	3.3%	2.5%	2.5%	6.4%
Home Improvement	2.9%	0.2%	0.0%	12.8%
Total	100%	100%	100%	100%

Key:
- Over represented versus global share
- Similar/comparable to global share
- Under represented versus global share

While combined, the Wellness and Cosmetic & Personal Care categories continue to make up more than half the entire industry, there are some significant differences from region to region.

Share of Wellness Products by Country, 2022

Americas

Bolivia	42%
Mexico	35%
United States	35%
Canada	34%
Ecuador	22%
Peru	21%
Chile	12%
Colombia	9%
Brazil	6%
Argentina	5%

Asia/Pacific

India	74%
Hong Kong, China	71%
Indonesia	67%
Taiwan, China	66%
Philippines	61%
Singapore	55%
Thailand	48%
Malaysia	47%
Australia	43%
New Zealand	41%
Kazakhstan	38%
Korea	23%

Europe

Ireland	73%
Netherlands	70%
Sweden	60%
Portugal	54%
Finland	51%
Latvia	50%
Italy	50%
United Kingdom	46%
Lithuania	46%
Ukraine	38%
Russia	37%
Estonia	36%
Slovakia	22%
Poland	17%
Czech Republic	14%
France	12%
Germany	8%


Behind the
Scenes

The WFDSA Research Committee developed the global industry statistics since 2003. The collection of this data initially was focused on two key data points, sales and numbers of independent sales representatives.

The information during the early years was sufficient for developing trends, but the data collected was not based on standardized definitions, standardized methods of collection, or specific points in time.

In 2009, under the leadership of Andrea Jung, the statistical data collection process led by Josephine Mills was enhanced and improved. During Andrea's Chairmanship, WFDSA began collecting information at a specific time each year with focus on prior full calendar year results, developed standardized definitions which led to year-over-year comparative analysis.

In 2011, WFDSA contracted with an independent 3rd party, Paul Bourquin, Cadmus (formerly Nathan Associates), to be able to ensure collection of information on a confidential basis. In 2011, WFDSA also established the WFDSA Industry Research Committee, under the Association Services Committee, with Judy Jones being the first chairperson.. With an established team, the statistical gathering / research was up and running. The committee later refined the process and increased the source of data not only from the DSAs, but also from the CEO Council members which are the leading multinational direct selling companies.

This year, WFDSA is pleased to introduce its comprehensive publication, WFDSA STATS, the first of a series of annual publications, to provide this information directly from the source to internal and external audiences.

WFDSA, the only global organization in the direct selling world consisting of 61 Direct Selling Associations, is the most credible source of direct selling statistical information.

DEVELOP

Develop industry trending based on current and prior results to provide companies with the information necessary to develop their strategy going forward and to adjust their business plans as necessary to increase their presence in each market in which they do business

UNDERSTAND

Understand the size of the direct selling industry in each geography and on a total global (worldwide) basis to develop annual direct retail sales in total and by product category

ESTIMATE

Estimate the numbers of independent sales representatives in total and by demographic categories (i.e., gender, age, engagement)

The Team

At the heart of every accomplishment, there exists a remarkable group of individuals

The quiet, committed, and dedicated heroes who work tirelessly, but not effortlessly behind the scenes. They are the unsung champions responsible for researching, estimating, developing and communicating the annual direct selling industry results. Their commitment and dedication results in the sharing of invaluable insight, resources, and tools for all DSAs and their member companies.

Have you ever wondered who they are and what they do to compile industry statistics with precision? These remarkable individuals work collaboratively as a cohesive team that together spend numerous hours, every year between January to July, to ensure the accuracy and timeliness of industry data. They meticulously review countless numbers and inputs, to represent the 61 member DSAs with utmost integrity.

Their efforts extend beyond number crunching; they forge close partnerships with the DSAs, gathering details about each country's overall economy, political environment, inflation/deflation rates, legal and legislative landscape, and more. Their in-depth analysis allows them to benchmark annual results and develop statistics with accuracy, reasonableness, and consistency.

According to Josephine Mills, WFDSA Industry Research Sub-Committee Co-Chair, every member of this team deserves accolades for their dedicated work and for its benefit to the entire industry. It is essential to recognize that these exceptional individuals undertake this crucial task as volunteers, alongside their daily responsibilities. They pour their expertise, passion, and unwavering attention into even the smallest of details, making them the true unsung heroes of our industry.

Josephine Mills

WFDSA Operating Group Member, WFDSA Assistant Treasurer, Co-Chair WFDSA Industry Research Committee

- 30 Years Direct Selling Executive, Avon Products, Inc. (Finance & Accounting, Communications, Corporate Compliance, Government Affairs)
- Former Industry Trade Advisory Committee of the United States Trade Representative's office and the United States Department of Commerce
- Former Vice Chair, National Better Business Bureaus

Tim Sanson

VP, Worldwide Sales Strategy & Analytics, Herbalife, Co-Chair WFDSA Industry Research Committee

- Business analytics, and the evaluation and development of Herbalife's marketing plan.
- Former General Manager in Australia/New Zealand, India and Thailand, for Herbalife
- Market Development for Asia Pacific region, Herbalife

Garth Wyllie

Executive Director, Direct Selling Association of New Zealand, Chair WFDSA Association Services Committee

- 29 years in the direct selling industry as Executive Director of the DSA of New Zealand
- Executive Director Manufacturing and Industry Groups at Employers and Manufacturers Association Northern Inc.
- Experienced Sales and Marketing Manager / GST Auditor

Carlos Eduardo Amaral

Marketing Intelligence Manager, Natura & Co.

- 13 years in the direct selling industry & manufacturing and retail environments performing marketing intelligence.
- MBA Marketing , FGV – Fundacao Getulio Vargas

Bob Bass

BOB BASS, Bob Bass, LLC – Strategic Consulting

- 39 years in the direct selling industry as Strategic Insights Lead – Global Strategic Planning, Amway Corporation
- BBA, Marketing - Detroit College of Business

Gonzalo Falcon

Executive Director, CAVEDI, Camara Argentina de Venta Directa

- 27+ years in the direct selling industry
- Direct Selling Business Consultant (+15 years)
- CEO, ADDFOW S.A.
- Former Advisor to Argentinian Secretary of Commerce

Imtiaz Ebrahim

Secretariat, DSA of South Africa

- 28 years in the direct selling industry (Finance & Operations)
- Country Director, Southern African region of a multinational Direct Selling Company
- Experienced in business expansion in various countries, e.g., South Africa, Botswana, Namibia, Zambia, Ghana, South Korea, Turkey, India, etc.

Jakob Jackson

Sr. Corporate Development / Global Strategy, Amway

- Former business intelligence, Global Marketing, Amway
- Partner, Co-founder Great Lakes Global, with a specialty in research and development
- Former Agricultural Development & Education, Africa

Tamara Shokereva

Executive Director, Corporate & Government Relations, Mary Kay

- 30 Years Direct Selling Executive, Mary Kay (Finance & Accounting, Legal & Tax, GR)
- President, DSA Russia and Head of Government Relations & Legal Committee
- PhD - Graduate of Moscow State University, served the Russian Academy of Science and Ministry of Science and Higher Education.

Michaela Vettard

Partner, Lone Star TI Group

- Former General Counsel of Oriflame, a major multi-national direct selling industry leader
- Experience includes market entries for Oriflame in Serbia, Georgia, Lebanon, Vietnam, and Iran
- Graduate of Law School, University of Sofia, Bulgaria with Masters degrees in International Business from University of Bristol, UK & Ecole National Des ponts eet Chaussees

Tamuna Gabilaia

WFDSA Executive Director & Chief Operating Officer

- Leads WFDSA development, planning & execution of WFDSA initiatives re: advocacy, women's economic empowerment, ethical conduct, & enhancing local association management
- Serves as the global Spokesperson for the direct selling industry, worldwide
- Former diplomat with extensive experience in international trade and development, high level negotiations.
- MA International Development, School of International Service, American University, Washington DC

Maureen Paniagua

WFDSA Director of International Affairs

- Oversees WFDSA development, planning & execution of WFDSA initiatives re: advocacy, women's economic empowerment, ethical conduct, & enhancing local association management
- BA, Political Science & History, University of Maryland

The Process

DSA Survey

- Review survey/Update for current year
- WFDSA Staff distributes to DSAs
- Country DSAs may add additional questions for their own purpose
- DSAs distribute to member companies and member companies respond
- DSAs gather responses and aggregate survey submissions
- The Team reviews and validates the data

CEO Council Survey

- Review Survey
- Update for current year
- WFDSA Staff distributes to CEO Council members
- Member companies submit data to 3rd party independent research firm
- Research firm follows up with CEOs as needed
- The research firm gathers and aggregates the data

DSA Survey Results

Compared to CEO Council aggregate submissions By country to determine trending / consistency and reasonableness for countries where DSAs aggregate data.

The CEO Council trending statistics are used as guidance to estimate those DSA countries where data is not available.

Other Sources to Validate Data

Prior year data from the surveys of DSAs and CEO Council members
Government data
Academic information
IMF macroeconomic data

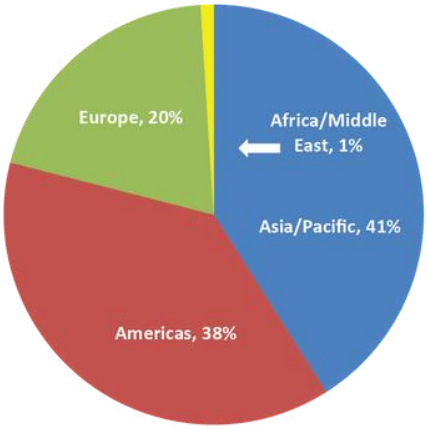
Additional Charts and Data

Results of the annual statistical survey are also made available at the WFDSA website, published in the WFDSA Annual Report, and reported in other ways. Between the local DSA members, DSAs, the WFDSA Industry Research Committee members, and WFDSA staff, the annual process takes more than 5,000 person hours to complete.

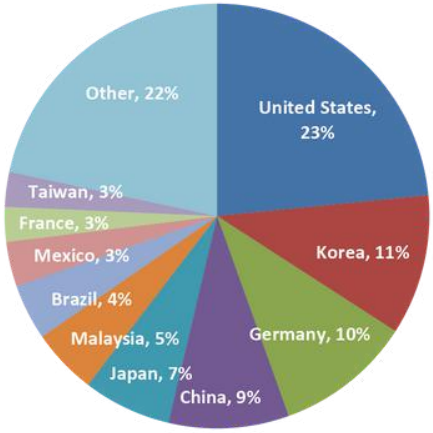
Paul Bourquin, The Cadmus Group, independent 3rd party vendor is responsible for direct contact between the DSAs / member companies handling the data to ensure it remains completely confidential. Without strict confidential protocols, none of this work would be possible.

Thank you to Julia Wright for the design and layout of this publication.

Global Direct Selling - 2022 Retail Sales



Regional Sales



Top 10 Global Markets

Global Industry: $172,891 (USD millions), Down 1.5% in Constant 2022 USD

Region/Country		2022 Retail Sales (1) Local Currency (millions)	2022 Retail Sales (1) USD (millions)	% Sales Change (YOY) in Constant 2022 USD (2)		3-Year CAGR in Constant 2022 USD (2019-2022)	Independent Representatives (3)
Global	(4)	na	172,891	-1.5%	▼	0.9%	114,878,041
Asia/Pacific		na	71,509	0.2%	▲	-1.7%	67,606,442
Australia		1,751	1,214	-7.8%	▼	1.0%	424,381
China	(5)(7)	106,566	15,818	-8.0%	▼	-13.6%	2,970,000
Hong Kong		2,806	358	-5.7%	▼	-2.0%	234,304
India		253,870	3,230	5.4%	▲	13.3%	12,320,500
Indonesia	(7)	21,150,000	1,424	-3.8%	▼	-2.2%	8,700,000
Japan		1,527,500	11,616	-2.3%	▼	-3.6%	2,511,681
Kazakhstan		226,988	493	28.2%	▲	18.5%	1,628,707
Korea		23,859,179	18,475	7.4%	▲	5.0%	8,014,628
Malaysia		38,000	8,634	5.6%	▲	9.8%	8,191,852
New Zealand		178	113	3.6%	▲	-5.3%	77,622
Philippines		64,945	1,192	-2.3%	▼	-5.1%	5,685,000
Singapore		669	485	13.9%	▲	9.8%	527,320
Taiwan		136,559	4,582	0.0%	▬	3.1%	3,648,700
Thailand		80,000	2,282	-6.0%	▼	-5.1%	10,900,000
Vietnam		28,453,000	1,223	11.7%	▲	19.3%	879,747
Other Asia/Pacific	(7)	na	370	-10.6%	▼	11.3%	892,000
Africa/Middle East		na	1,466	-13.3%	▼	-6.9%	4,774,307
Africa		na	1,266	-11.2%	▼	-6.8%	3,560,015
Morocco	(7)	1,010	99	-11.6%	▼	-6.3%	208,760
South Africa		9,306	569	-17.1%	▼	-7.2%	947,255
Other Africa	(7)	na	598	-4.7%	▼	-6.5%	2,404,000
Middle East		na	199	-24.7%	▼	-7.5%	1,214,292
Israel	(7)	230	68	-3.6%	▼	-3.9%	21,758
United Arab Emirates		105	29	0.0%	▬	25.0%	907,500
Other Middle East	(7)	na	102	-38.1%	▼	-13.8%	285,034
Americas		na	65,217	-3.2%	▼	4.0%	29,887,872
North America		na	43,113	-6.0%	▼	4.5%	15,708,000
Canada		3,375	2,593	-18.4%	▼	0.8%	1,108,000
United States		40,520	40,520	-5.0%	▼	4.8%	14,600,000

Global Direct Selling - 2022 Retail Sales

Region/Country		2022 Retail Sales (1) Local Currency (millions)	2022 Retail Sales (1) USD (millions)	% Sales Change (YOY) in Constant 2022 USD (2)		3-Year CAGR in Constant 2022 USD (2019-2022)	Independent Representatives (3)
South & Central America		na	22,104	2.5%	▲	3.1%	14,179,872
Argentina	(8)	245,640	1,881	58.1%	▲	65.3%	826,000
Bolivia	(6)	2,309	334	-11.4%	▼	-0.5%	370,000
Brazil		38,017	7,362	0.0%	▬	-0.2%	3,667,735
Chile		462,977	530	-31.6%	▼	3.3%	472,983
Colombia		9,961,484	2,340	7.9%	▲	10.5%	2,845,310
Ecuador		881	881	-1.0%	▼	-8.7%	412,341
Mexico		118,513	5,888	1.0%	▲	0.8%	4,127,610
Peru		8,023	2,092	-1.7%	▼	0.2%	736,964
Uruguay	(6)(7)	2,768	67	-7.2%	▼	-3.6%	64,019
Venezuela	(9)	na	na	na	na	na	na
Central America/Caribbean	(7)	na	701	-4.3%	▼	-0.5%	629,834
Other South & Central America	(7)	na	28	-10.0%	▼	0.1%	27,076
Europe		na	34,700	-1.1%	▼	1.6%	12,609,419
European Union		na	30,081	1.8%	▲	1.6%	6,045,006
Austria	(7)	318	335	0.6%	▲	7.7%	278,344
Belgium	(7)	176	185	-9.6%	▼	0.2%	21,675
Bulgaria	(7)	163	87	-4.5%	▼	0.4%	190,402
Croatia	(7)	228	32	-18.6%	▼	-7.6%	34,603
Cyprus	(7)	6	7	-20.1%	▼	-4.2%	9,382
Czech Republic		9,093	389	-9.1%	▼	6.4%	332,087
Denmark	(7)	604	85	-1.0%	▼	0.2%	61,125
Estonia		49	52	-8.0%	▼	-0.4%	38,650
Finland		100	105	-11.8%	▼	-10.0%	50,001
France		4,352	4,583	-5.0%	▼	-2.0%	706,632
Germany		17,080	17,986	6.6%	▲	3.1%	909,043
Greece	(7)	85	89	-18.4%	▼	-8.1%	93,475
Hungary	(7)	65,688	176	-5.9%	▼	3.1%	436,298
Ireland	(6)	25	26	-10.7%	▼	-6.5%	15,313
Italy		2,745	2,891	3.9%	▲	1.2%	620,000
Latvia		78	82	-8.0%	▼	4.7%	59,600
Lithuania		101	107	-6.0%	▼	4.8%	80,370
Luxembourg	(7)	38	40	-5.3%	▼	-3.3%	2,340
Malta	(7)	5	6	-34.8%	▼	-15.5%	9,125
Netherlands		119	125	-12.3%	▼	0.3%	86,568
Poland		4,597	1,031	-6.8%	▼	2.8%	956,969
Portugal		200	211	-19.6%	▼	-1.4%	224,700
Romania	(7)	1,647	351	-3.1%	▼	-3.3%	306,312
Slovakia		165	173	-10.8%	▼	-0.6%	183,298
Slovenia	(7)	25	26	-2.8%	▼	5.9%	21,789
Spain	(7)	688	725	-12.5%	▼	-2.9%	215,187
Sweden		1,773	175	-13.4%	▼	-6.1%	101,720
Rest of Europe		na	4,619	-16.5%	▼	1.7%	6,564,413
Norway	(7)	1,609	167	-12.4%	▼	1.0%	53,207
Russia		116,316	1,698	-22.6%	▼	-7.3%	3,909,604
Switzerland	(7)	384	402	-6.1%	▼	5.1%	166,380
Turkey	(7)	4,772	539	33.1%	▲	20.2%	1,152,853
Ukraine		5,158	159	-38.0%	▼	-17.1%	563,793
United Kingdom	(6)	1,010	1,245	-21.0%	▼	21.2%	405,224
Other Europe	(7)	na	408	-15.4%	▼	-3.8%	313,352

 na = not available

(1) Sales figures are expressed at Estimated Retail level and exclude Value Added Tax. Unless otherwise noted, country figures are for the entire industry and are based on research by national direct selling associations including surveys of their member companies

(2) Sales figures for 2021 and 2022 are expressed in US Constant 2022 Dollars to exclude the impact of foreign exchange and ensure comparability. Average annual exchange rates from the International Monetary Fund (IMF) have been used to convert data from local currency to US dollars.

(3) Independent Representatives have signed an Independent Contractor agreement with a direct selling company enabling them to purchase products at a discount, sell, sponsor and earn, including:

- Full time Business Builders actively working to grow their businesses, typically devoting more than 30 hours weekly to direct selling activities
- Part time Business Builders , typically devoting less than 30 hours weekly
- Others who may be new to direct selling; or may have joined primarily to purchase favorite products at a discount; and others who join but just never become active.

(4) Global sales and seller counts during 2022 were materially impacted by China (see separate footnote).Excluding China, the Global YOY Sales Change was 0.8% and the 3 Year CAGR was 3.0% (in constant 2022 USD).

(5) China had a fourth consecutive year of decline with the impact of COVID 19 more materially impacting the industry in China, which was still recovering from the unrelated events that impacted 2019 sales.

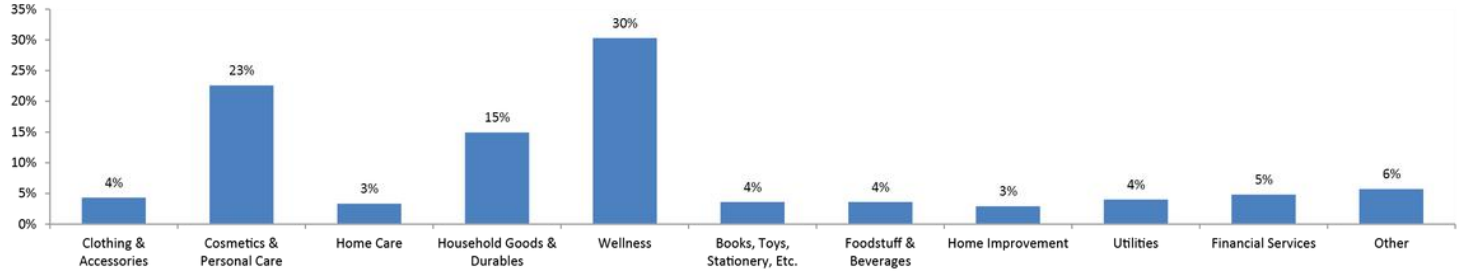
(6) Figures are based only on DSA member companies and not the entire industry.

(7) WFDSA research estimate

(8) Argentina is a highly inflationary market. In 2022, inflation increased 72% and real GDP increased 5%, according to the IMF.

(9) Based on the highly inflationary economic situation and lack of stability in Venezuela, the WFDSA Global Research Subcommittee has decided to suspend reporting on the Venezuelan market until further notice. Figures for this country have been backed out of his tory, as well.

Global Sales by Product Category - 2022



2022 Retail Sales by Product Category

Region/Country	Clothing & Accessories	Cosmetics & Personal Care	Home Care	Household Goods & Durables	Wellness	Books, Toys, Stationery, Etc.	Foodstuff & Beverages	Home Improvement	Utilities	Financial Services	Other
Global	4%	23%	3%	15%	30%	4%	4%	3%	4%	5%	6%
Asia/Pacific	1%	21%	3%	20%	42%	6%	4%	0%	1%	0%	2%
Australia	3%	25%	4%	20%	43%	2%	2%	0%	1%	0%	1%
China	na	na	na	na	na	na	na	na	na	na	na
Hong Kong	0%	21%	1%	7%	71%	0%	0%	0%	0%	0%	0%
India	0%	17%	3%	1%	74%	0%	4%	0%	0%	0%	2%
Indonesia	3%	17%	1%	8%	67%	0%	3%	0%	0%	0%	1%
Japan	na	na	na	na	na	na	na	na	na	na	na
Kazakhstan	1%	43%	12%	4%	38%	0%	1%	0%	0%	0%	2%
Korea	0%	22%	2%	33%	23%	13%	6%	0%	1%	0%	0%
Malaysia	3%	21%	3%	16%	47%	1%	4%	1%	0%	0%	4%
New Zealand	5%	20%	3%	15%	41%	1%	2%	11%	1%	0%	1%
Philippines	1%	20%	3%	11%	61%	0%	1%	0%	0%	0%	3%
Singapore	5%	24%	2%	11%	55%	0%	2%	0%	0%	0%	1%
Taiwan	2%	18%	3%	5%	66%	0%	0%	0%	0%	0%	6%
Thailand	0%	26%	1%	12%	48%	0%	6%	0%	0%	0%	7%
Vietnam	na	na	na	na	na	na	na	na	na	na	na
Other Asia/Pacific	na	na	na	na	na	na	na	na	na	na	na

Global Sales by Product Category - 2022

Region/Country	Clothing & Accessories	Cosmetics & Personal Care	Home Care	Household Goods & Durables	Wellness	Books, Toys, Stationery, Etc.	Foodstuff & Beverages	Home Improvement	Utilities	Financial Services	Other
Africa/Middle East	na	na	na	na	na	na	na	na	na	na	na
Africa	na	na	na	na	na	na	na	na	na	na	na
Morocco	na	na	na	na	na	na	na	na	na	na	na
South Africa	10%	44%	1%	17%	26%	0%	0%	0%	0%	1%	1%
Other Africa	na	na	na	na	na	na	na	na	na	na	na
Middle East	na	na	na	na	na	na	na	na	na	na	na
Israel	na	na	na	na	na	na	na	na	na	na	na
United Arab Emirates	5%	15%	5%	25%	30%	0%	0%	0%	10%	10%	0%
Other Middle East	na	na	na	na	na	na	na	na	na	na	na
Americas	6%	27%	3%	13%	29%	2%	1%	0%	4%	8%	7%
North America	5%	12%	2%	14%	35%	3%	1%	0%	6%	12%	11%
Canada	2%	35%	2%	18%	34%	3%	2%	0%	4%	0%	0%
United States	5%	11%	2%	14%	35%	3%	1%	0%	7%	13%	11%
South & Central America	9%	57%	4%	11%	17%	0%	1%	0%	0%	0%	0%
Argentina	1%	67%	10%	17%	5%	0%	0%	0%	0%	0%	0%
Bolivia	6%	37%	0%	15%	42%	0%	0%	0%	0%	0%	0%
Brazil	4%	73%	8%	8%	6%	0%	0%	0%	0%	0%	0%
Chile	6%	72%	9%	0%	12%	0%	0%	0%	0%	0%	0%
Colombia	32%	42%	3%	5%	9%	0%	9%	0%	0%	0%	0%
Ecuador	15%	54%	1%	8%	22%	0%	0%	0%	0%	0%	0%
Mexico	6%	40%	0%	19%	35%	0%	0%	0%	0%	0%	0%
Peru	20%	54%	0%	5%	21%	0%	0%	0%	0%	0%	0%
Uruguay	na	na	na	na	na	na	na	na	na	na	na
Venezuela	na	na	na	na	na	na	na	na	na	na	na
Central America/Caribbean	na	na	na	na	na	na	na	na	na	na	na
Other South & Central America	na	na	na	na	na	na	na	na	na	na	na
Europe	4%	15%	6%	12%	18%	5%	8%	13%	8%	5%	7%
European Union	4%	12%	7%	13%	15%	5%	9%	14%	9%	5%	7%
Austria	na	na	na	na	na	na	na	na	na	na	na
Belgium	na	na	na	na	na	na	na	na	na	na	na
Bulgaria	na	na	na	na	na	na	na	na	na	na	na
Croatia	na	na	na	na	na	na	na	na	na	na	na
Cyprus	na	na	na	na	na	na	na	na	na	na	na
Czech Republic	1%	39%	2%	39%	14%	0%	3%	0%	0%	0%	2%
Denmark	na	na	na	na	na	na	na	na	na	na	na
Estonia	3%	41%	8%	12%	36%	0%	0%	0%	0%	0%	0%
Finland	2%	35%	7%	3%	51%	1%	1%	0%	0%	0%	0%
France	9%	9%	7%	20%	12%	1%	1%	33%	4%	0%	4%
Germany	4%	10%	8%	11%	8%	6%	11%	11%	13%	8%	10%
Greece	na	na	na	na	na	na	na	na	na	na	na
Hungary	na	na	na	na	na	na	na	na	na	na	na
Ireland	0%	23%	1%	0%	73%	0%	3%	0%	0%	0%	0%
Italy	0%	7%	1%	5%	50%	8%	13%	17%	0%	0%	0%
Latvia	2%	38%	6%	3%	50%	1%	0%	0%	0%	0%	0%
Lithuania	2%	43%	5%	3%	46%	1%	0%	0%	0%	0%	0%
Luxembourg	na	na	na	na	na	na	na	na	na	na	na

Region/Country	Clothing & Accessories	Cosmetics & Personal Care	Home Care	Household Goods & Durables	Wellness	Books, Toys, Stationery, Etc.	Foodstuff & Beverages	Home Improvement	Utilities	Financial Services	Other
Malta	na	na	na	na	na	na	na	na	na	na	na
Netherlands	na	na	na	na	na	na	na	na	na	na	na
Poland	2%	46%	1%	29%	17%	0%	2%	0%	0%	0%	3%
Portugal	4%	39%	1%	1%	54%	0%	0%	0%	0%	0%	1%
Romania	na	na	na	na	na	na	na	na	na	na	na
Slovakia	2%	53%	3%	19%	22%	0%	1%	0%	0%	0%	0%
Slovenia	na	na	na	na	na	na	na	na	na	na	na
Spain	na	na	na	na	na	na	na	na	na	na	na
Sweden	2%	29%	3%	1%	60%	2%	2%	0%	0%	0%	1%
Rest of Europe	na	na	na	na	na	na	na	na	na	na	na
Norway	na	na	na	na	na	na	na	na	na	na	na
Russia	4%	42%	6%	9%	37%	0%	0%	0%	0%	0%	2%
Switzerland	na	na	na	na	na	na	na	na	na	na	na
Turkey	na	na	na	na	na	na	na	na	na	na	na
Ukraine	1%	54%	5%	2%	38%	0%	1%	0%	0%	0%	0%
United Kingdom	9%	40%	2%	0%	46%	3%	0%	0%	0%	0%	0%
Other Europe	na	na	na	na	na	na	na	na	na	na	na

 na = not available

Note: Figures for this report are based only on DSA member companies, except in Taiwan and the United States where the figures represent the entire direct selling industry. Figures are expressed as percentages of estimated retail sales, excluding VAT. Percentages may not sum to 100% due to rounding.

Direct Selling in Asia/Pacific: 2022 Retail Sales

Countries	2022 Sales (1)				2022 - Individuals active in direct selling (3)	
	Local currency (millions)	USD (2) (millions)	% Sales changes with 2021		Number	% of women
Australia	1751	1214	-7.8%	▼	424381	80%
China	106566	15818	-8.0%	▼	2970000	NA
Hong Kong, China	2806	358	-5.7%	▼	234304	68%
India	253870	3230	5.4%	▲	12320500	40%
Indonesia	21150000	1424	-3.8%	▼	8700000	64%
Japan	1527500	11616	-2.3%	▼	2511681	82%
Kazakhstan	226988	493	28.2%	▲	1628707	82%
Korea	23859179	18475	7.4%	▲	8014628	81%
Malaysia	38000	8634	5.6%	▲	8191852	65%
New Zealand	178	113	3.6%	▲	77622	73%
Philippines	64945	1192	-2.3%	▼	5685000	74%
Singapore	669	485	13.9%	▲	527320	71%
Taiwan, China	136559	4582	0.0%	–	3648700	69%
Thailand	80000	2282	-6.0%	▼	10900000	68%
Vietnam	28453000	1223	11.7%	▲	879747	NA
Other Asia/Pacific		370	-10.6%	▼	892000	NA
Total		71509	0.2%	▲	67606442	65%

(1) Sales figures are expressed at estimated retail level excl. VAT. **Unless otherwise noted, country figures are for the entire industry and are based on research by national direct selling associations including surveys of their member companies.**
(2) 2022 average exchange rates from the IMF were used to convert local currency to US dollars.
(3) Individuals active in direct selling are people who are career minded entrepreneurs building their own business (typically devoting more than 30 hours/week to direct selling activities), or part-time entrepreneurs earning additional income (typically devoting less than 30 hours/week to their direct selling activities). Others may have joined primarily to purchase favourite products at a discount price.
(4) China had a fourth consecutive year of decline with the impact of COVID-19 more materially impacting the industry in China, which was still recovering from the unrelated events that impacted 2019 sales.
(5) WFDSA research estimate.
(6) Asia/Pacific sales and seller counts during 2022 were materially impacted by China (see separate footnote). Excluding China, the Asia/Pacific YOY sales change was 2.8%.

Direct Selling in Africa/Middle East: 2022 Retail Sales

Countries	2022 Sales (1)				2022 - Individuals active in direct selling (3)	
	Local currency (millions)	USD (2) (millions)	% Sales changes with 2021		Number	% of women
Morocco (4)	1010	99	-11.6%	▼	208760	NA
South Africa	9306	569	-17.1%	▼	947255	83%
Other Africa (4)		598	-4.7%	▼	2404000	NA
Total Africa		1266	-11.2%	▼	3560015	NA
Israel (4)	230	68	-3.6%	▼	21758	NA
United Arab Emirates	105	29	0.0%	–	907500	60%
Other Middle East (4)		102	-38.1%	▼	285034	NA
Total Middle East		199	-24.7%	▼	1214292	NA
Total		1466	-13.3%	▼	4774307	NA

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(2) 2022 average exchange rates from the IMF were used to convert local currency to US dollars.
(3) Individuals active in direct selling are people who are career minded entrepreneurs building their own business (typically devoting more than 30 hours/week to direct selling activities), or part-time entrepreneurs earning additional income (typically devoting less than 30 hours/week to their direct selling activities). Others may have joined primarily to purchase favourite products at a discount price.
(4) WFDSA research estimate.

Direct Selling in North America: 2022 Retail Sales

Countries	2022 Sales (1)			2022 - Individuals active in direct selling (3)	
	Local currency (millions)	USD (2) (millions)	% Sales changes with 2021	Number	% of women
Canada	3375	2593	-18.4% ▼	1108000	87%
United States	40520	40520	-5.0% ▼	14600000	75%
Total		43113	-6.0% ▼	15708000	76%

(1) Sales figures are expressed at estimated retail level excl. VAT. **Unless otherwise noted, country figures are for the entire industry and are based on research by national direct selling associations including surveys of their member companies.**
(2) 2022 average exchange rates from the IMF were used to convert local currency to US dollars.
(3) Individuals active in direct selling are people who are career minded entrepreneurs building their own business (typically devoting more than 30 hours/week to direct selling activities), or part-time entrepreneurs earning additional income (typically devoting less than 30 hours/week to their direct selling activities). Others may have joined primarily to purchase favourite products at a discount price.

Direct Selling in South & Central America: 2022 Retail Sales

Countries	2022 Sales (1)				2022 - Individuals active in direct selling (3)	
	Local currency (millions)	USD (2) (millions)	% Sales changes with 2021		Number	% of women
Argentina (4)	245640	1881	58.1%	▲	826000	95%
Bolivia (5)	2309	334	-11.4%	▼	370000	86%
Brazil	38017	7362	0.0%	–	3667735	86%
Chile	462977	530	-31.6%	▼	472983	85%
Colombia	9961484	2340	7.9%	▲	2845310	84%
Ecuador	881	881	-1.0%	▼	412341	75%
Mexico	118513	5888	1.0%	▲	4127610	80%
Peru	8023	2092	-1.7%	▼	736964	82%
Uruguay (5)(6)	2768	67	-7.2%	▼	64019	NA
Venezuela (7)						NA
Central America/Caribbean (6)		701	-4.3%	▼	629834	NA
Other South & Central America (6)		28	-10.0%	▼	27076	NA
Total		22104	2.5%	▲	14179872	84%

(1) Sales figures are expressed at estimated retail level excl. VAT. **Unless otherwise noted, country figures are for the entire industry and are based on research by national direct selling associations including surveys of their member companies.**
(2) 2022 average exchange rates from the IMF were used to convert local currency to US dollars.
(3) Individuals active in direct selling are people who are career minded entrepreneurs building their own business (typically devoting more than 30 hours/week to direct selling activities), or part-time entrepreneurs earning additional income (typically devoting less than 30 hours/week to their direct selling activities). Others may have joined primarily to purchase favourite products at a discount price.
(4) Argentina is a highly inflationary market. In 2022, inflation increased 72% and real GDP increased 5%, according to the IMF.
(5) Figures are based only on DSA member companies and not the entire industry.
(6) WFDSA research estimate.
(7) Based on the highly inflationary economic situation and lack of stability in Venezuela, the WFDSA Global Research Sub-committee has decided to suspend reporting on the Venezuelan market until further notice. Figures for this country have been backed out of history, as well.

Direct Selling in Europe: 2022 Retail Sales

Countries	2022 Sales (1)				2022 - Individuals active in direct selling (3)	
	Local currency (millions)	EURO (2) (millions)	% Sales changes with 2021		Number	% of women
Austria (4)	318	318	0.6%	▲	278344	NA
Belgium (4)	176	176	-9.6%	▼	21675	NA
Bulgaria (4)	163	83	-4.5%	▼	190402	NA
Croatia (4)	228	30	-18.6%	▼	34603	NA
Cyprus (4)	6	6	-20.1%	▼	9382	NA
Czech Rep	9093	370	-9.1%	▼	332087	80%
Denmark (4)	604	81	-1.0%	▼	61125	NA
Estonia	49	49	-8.0%	▼	38650	90%
Finland	100	100	-11.8%	▼	50001	85%
France	4352	4352	-5.0%	▼	706632	80%
Germany	17080	17080	6.6%	▲	909043	53%
Greece (4)	85	85	-18.4%	▼	93475	NA
Hungary (4)	65688	167	-5.9%	▼	436298	NA
Ireland (5)	25	25	-10.7%	▼	15313	76%
Italy	2745	2745	3.9%	▲	620000	69%
Latvia	78	78	-8.0%	▼	59600	90%
Lithuania	101	101	-6.0%	▼	80370	91%
Luxembourg (4)	38	38	-5.3%	▼	2340	NA
Malta (4)	5	5	-34.8%	▼	9125	NA
Netherlands	119	119	-12.3%	▼	86568	78%
Poland	4597	979	-6.8%	▼	956969	86%
Portugal	200	200	-19.6%	▼	224700	71%
Romania (4)	1647	334	-3.1%	▼	306312	NA
Slovakia	165	165	-10.8%	▼	183298	88%
Slovenia (4)	25	25	-2.8%	▼	21789	NA
Spain (4)	688	688	-12.5%	▼	215187	NA
Sweden	1773	167	-13.4%	▼	101720	81%
Total EU		28566	1.8%	▲	6045006	74%
Kazakhstan	226988	468	28.2%	▲	1628707	82%
Norway (4)	1609	159	-12.4%	▼	53207	NA
Russia	116316	1613	-22.6%	▼	3909604	91%
Switzerland (4)	384	382	-6.1%	▼	166380	NA
Turkey (4)	4772	274	33.1%	▲	1152853	NA
Ukraine	5158	151	-38.0%	▼	563793	78%
UK (5)	1010	1182	-21.0%	▼	405224	79%
Others (4)		387	-15.4%	▼	313352	NA
Total		33182	-1.0%	▼	14238126	82%

Excl. VAT

(1) Sales figures are expressed at estimated retail level excl. VAT. **Unless otherwise noted, country figures are for the entire industry and are based on research by national direct selling associations including surveys of their member companies.**
(2) 2022 average exchange rates from the IMF were used to convert local currency to euro.
(3) Individuals active in direct selling are people who are career minded entrepreneurs building their own business (typically devoting more than 30 hours/week to direct selling activities), or part-time entrepreneurs earning additional income (typically devoting less than 30 hours/week to their direct selling activities). Others may have joined primarily to purchase favourite products at a discount price.
(4) WFDSA research estimate.
(5) Figures are based only on DSA member companies and not the entire industry.

Direct Sales as % of GDP by Country, 2022

Asia/Pacific		Americas		Europe	
Average	0.397%	Average	0.429%	Average	0.089%
Malaysia	2.117%	Peru	0.863%	Germany	0.441%
Korea	1.109%	Bolivia	0.773%	Latvia	0.194%
Taiwan,China	0.601%	Ecuador	0.757%	France	0.165%
Thailand	0.426%	Colombia	0.680%	Slovakia	0.153%
Vietnam	0.301%	Mexico	0.416%	Lithuania	0.151%
Philippines	0.295%	Brazil	0.383%	Poland	0.150%
Japan	0.274%	Argentina	0.297%	Italy	0.144%
Kazakhstan	0.218%	Chile	0.176%	Estonia	0.136%
Indonesia	0.108%	United States	0.159%	Czech Republic	0.134%
Singapore	0.104%	Canada	0.121%	Romania	0.116%
Hong Kong ,China	0.099%	Uruguay	0.094%	Ukraine	0.105%
India	0.095%			Hungary	0.105%
China	0.087%			Bulgaria	0.098%
Australia	0.071%			Portugal	0.083%
New Zealand	0.047%			Russia	0.077%
				Austria	0.071%
				Turkey	0.060%
				Spain	0.052%
				Switzerland	0.050%
				Luxembourg	0.049%
				Croatia	0.045%
				Slovenia	0.042%
				Greece	0.041%
				Finland	0.037%
				Malta	0.032%
				Belgium	0.032%
				Sweden	0.030%
				Norway	0.029%
				Cyprus	0.023%
				Denmark	0.022%
				Netherlands	0.013%
				Ireland	0.005%

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