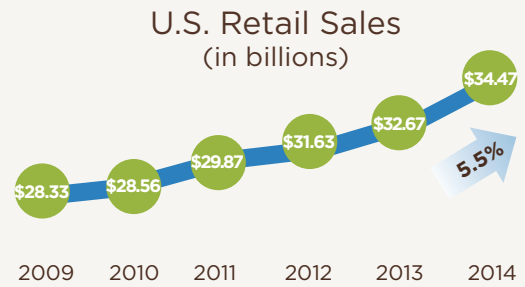


Direct Selling in 2014: An Overview

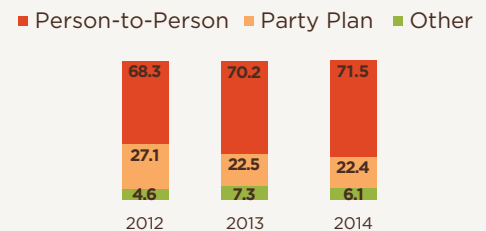
Over 18 million people (18.2) were involved in direct selling in the United States in 2014, with estimated retail sales reaching \$34.5 billion, a 5.5% increase from 2013. The direct sales channel continues to experience steady growth, as more individuals generated more revenue in 2014 than any year previously.



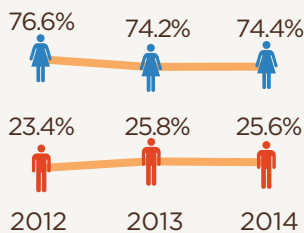
People Involved in Direct Selling (in millions)



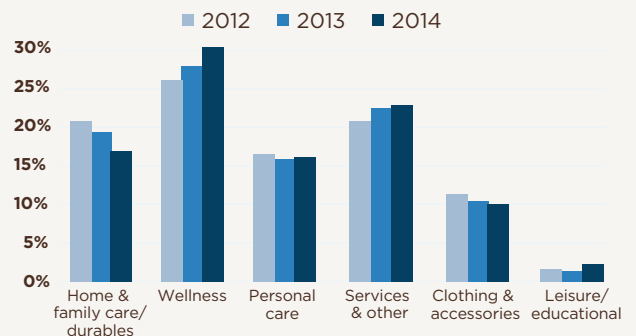
Percentage by Sales Strategy



Representatives by Gender



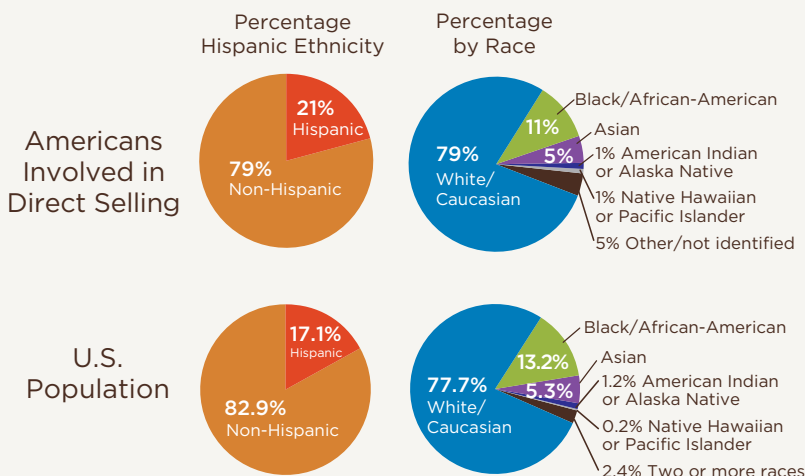
Sales by Major Product Group



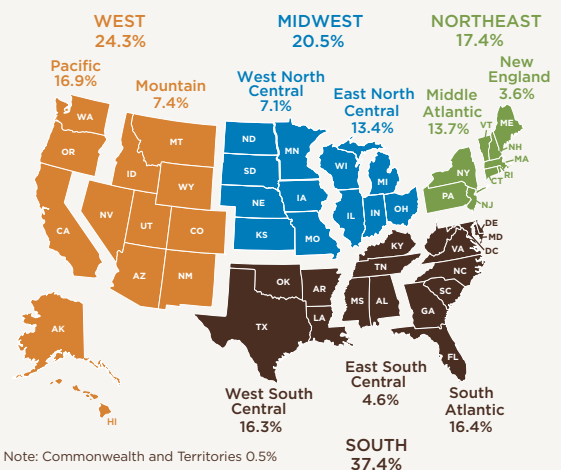
Note: Starting in 2014, adult products were moved from Other to Leisure & Educational. For 2014, there are no products or services in Other.

Ethnic and Racial Demographics

Direct selling reflects America.



Sales by Census Region



Note: Commonwealth and Territories 0.5%

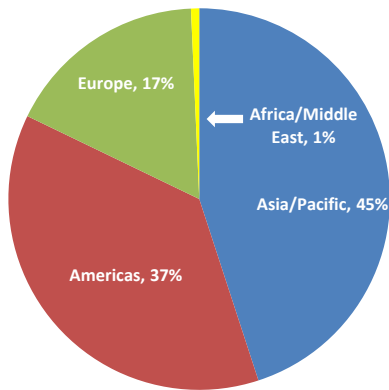
Source: U.S. Census Bureau: USA People QuickFacts data updated 6/30/14 for 2013; <http://quickfacts.census.gov/qfd/states/00000.html>



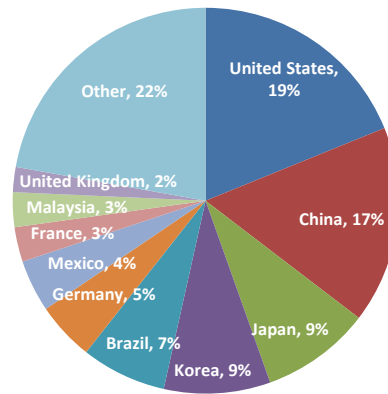
Global Direct Selling - 2014 Retail Sales

Published May 29, 2015

Not for use after May 28, 2016



Regional Sales



Top 10 Global Markets

Global Industry: \$182,823 (USD millions), Up 6.4% in Constant 2014 USD

Region/Country	2014 Retail Sales (1)		% Sales Change (YOY) in Constant 2014 USD (2)	3-Year CAGR in Constant 2014 USD (2011-14)	Direct Sellers (3)
	Local Currency (millions)	USD (millions)			
Global	na	182,823	6.4% ▲	6.5%	99,724,641
Asia/Pacific	na	81,542	9.1% ▲	8.4%	51,069,666
Australia (4)	1,570	1,414	5.4% ▲	3.9%	557,355
China (7)	185,533	30,217	18.6% ▲	18.7%	na
Hong Kong (4)	3,556	459	-10.6% ▼	1.1%	549,489
India	71,645	1,174	4.0% ▲	12.3%	4,383,487
Indonesia	12,683,300	1,069	8.0% ▲	11.3%	11,743,600
Japan	1,777,000	16,774	1.7% ▲	-2.3%	3,314,000
Kazakhstan (5)	63,240	353	2.0% ▲	3.3%	336,000
Korea	17,225,831	16,359	8.7% ▲	8.1%	5,978,302
Malaysia	17,330	5,300	5.0% ▲	8.0%	4,300,000
New Zealand	261	216	-7.8% ▼	3.9%	100,309
Philippines (5)	52,871	1,191	7.9% ▲	17.6%	4,020,000
Singapore	512	403	0.5% ▲	7.5%	405,333
Taiwan	98,222	3,241	2.8% ▲	4.0%	3,175,000
Thailand	89,600	2,759	-4.0% ▼	1.5%	11,000,000
Vietnam (5)	8,888,607	420	3.4% ▲	18.1%	1,075,491
Other Asia/Pacific (5)	na	194	11.0% ▲	9.3%	131,300
Africa/Middle East	na	1,241	3.0% ▲	5.5%	1,584,542
Africa	na	1,082	2.8% ▲	6.4%	1,471,056
Morocco (5)	118	14	14.0% ▲	-0.8%	99,310
South Africa	7,338	676	5.6% ▲	5.4%	1,136,546
Other Africa (5)	na	392	-2.0% ▼	8.7%	235,200
Middle East	na	159	4.4% ▲	0.1%	113,486
Israel (5)	196	55	3.2% ▲	-0.4%	25,486
Other Middle East (5)	na	104	5.0% ▲	0.4%	88,000
Americas	na	67,431	4.8% ▲	5.9%	33,100,221
North America	na	36,295	5.1% ▲	4.4%	18,979,688
Canada	2,026	1,825	-2.6% ▼	-2.7%	779,688
United States	34,470	34,470	5.5% ▲	4.9%	18,200,000

Region/Country	2014 Retail Sales (1)		% Sales Change (YOY) in Constant 2014 USD (2)	3-Year CAGR in Constant 2014 USD (2011-14)	Direct Sellers (3)	
	Local Currency (millions)	USD (millions)				
South & Central America	na	31,136	4.6%	▲	7.8%	14,120,533
Argentina	14,310	1,771	37.7%	▲	28.8%	715,000
Bolivia (4)(5)	2,261	327	-3.8%	▼	11.8%	297,010
Brazil	30,637	13,037	0.2%	▲	6.7%	4,495,153
Chile (5)	268,356	471	3.3%	▲	5.4%	341,943
Colombia	6,255,099	3,125	10.4%	▲	7.5%	2,023,948
Ecuador	922	922	6.0%	▲	9.5%	1,004,000
Mexico	105,975	7,974	2.1%	▲	5.9%	2,200,000
Peru (4)	5,320	1,873	5.7%	▲	7.5%	484,369
Uruguay (5)	2,175	94	17.0%	▲	13.1%	92,700
Venezuela (2)(5)	22,400	747	40.0%	▲	19.8%	1,417,950
Central America/Caribbean (5)	na	770	2.0%	▲	3.0%	1,022,640
Other South & Central America (5)	na	26	4.0%	▲	9.2%	25,820
Europe	na	32,609	3.4%	▲	3.4%	13,970,212
Western Europe	na	24,619	4.0%	▲	3.7%	3,420,322
Austria (5)	224	298	2.4%	▲	-0.3%	165,270
Belgium (5)	193	258	1.6%	▲	3.5%	20,910
Denmark (5)	486	87	3.1%	▲	1.2%	62,580
Finland	184	245	2.3%	▲	3.6%	84,120
France	4,001	5,335	0.0%	▬	2.6%	572,000
Germany (6)	6,686	8,915	4.8%	▲	5.7%	414,057
Greece (5)	151	202	-7.6%	▼	-5.7%	194,290
Ireland	27	36	-46.0%	▼	-18.8%	24,000
Italy	2,419	3,225	3.7%	▲	-0.1%	508,943
Luxembourg	42	55	0.0%	▬	1.2%	2,700
Netherlands	111	148	0.3%	▲	3.9%	48,144
Norway	838	133	3.8%	▲	5.3%	102,762
Portugal (5)	209	279	0.4%	▲	1.3%	195,180
Spain	634	845	7.8%	▲	-1.3%	205,265
Sweden	2,241	327	-3.0%	▼	-4.8%	99,891
Switzerland (5)	306	333	0.9%	▲	-1.1%	156,210
United Kingdom	2,367	3,880	10.9%	▲	8.2%	544,000
Other Western Europe (5)	20	20	4.0%	▲	-0.1%	20,000
Central & Eastern Europe	na	7,990	1.8%	▲	2.8%	10,549,890
Bulgaria (5)	158	107	3.3%	▲	2.8%	118,340
Croatia	320	56	18.9%	▲	-14.4%	39,986
Czech Republic (5)	6,432	310	-0.3%	▼	0.5%	276,390
Estonia (4)	31	41	2.5%	▲	13.0%	36,150
Hungary	53,305	229	-5.6%	▼	4.1%	470,544
Latvia (4)	30	40	1.6%	▲	8.8%	47,093
Lithuania	94	125	2.7%	▲	7.8%	103,336
Poland	3,740	1,187	1.1%	▲	5.2%	970,933
Romania (5)	1,250	373	1.4%	▲	6.8%	302,500
Russia	138,305	3,604	0.3%	▲	1.6%	5,425,830
Slovakia (5)	130	173	-1.0%	▼	5.3%	180,380
Slovenia	15	20	-16.4%	▼	-3.4%	21,000
Turkey	1,920	877	10.5%	▲	5.4%	1,145,768
Ukraine	5,674	477	-2.2%	▼	-1.9%	1,041,940
Other Central & Eastern Europe (5)	na	371	15.0%	▲	5.0%	369,700

©Copyright WFDSA 2015 na = not available

(1) Sales figures are expressed at Estimated Retail level and exclude Value Added Tax. Figures are based on the size of the entire industry, unless otherwise noted.

(2) Sales figures for 2013 and 2014 are expressed in US Constant 2014 Dollars to exclude the impact of foreign exchange and ensure comparability. Average annual exchange rates from the International Monetary Fund have been used to convert data from local currency to US dollars. A notable exception is Venezuela, where an average of exchange rates used by some direct selling companies in the market was used.

(3) Direct Sellers include individuals who are career minded entrepreneurs building their own businesses ... or part-time entrepreneurs earning extra income. Most enjoy significant discounts on products. In fact, some choose only to enjoy and use the products and not to sell at all.

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

(5) WFDSA research estimate

(6) The German DSA (Bundesverband Direktvertrieb Deutschland - BDD) commissions the University of Mannheim to conduct its annual statistical research; final report to be published in August. Preliminary figures indicate the size of the German market at €15.3 billion, including VAT, based on a broader definition of Direct Selling than that used by WFDSA. In 2015, BDD is not including the Construction and Finance/Insurance sectors. For the sake of global comparability, WFDSA has further excluded items such as VAT, Energy, and Telecommunications.

(7) WFDSA research estimate based on 2014 China Direct Sales Annual Performance Report [Vol. 1028], produced by the World Direct Selling (China) Research Center.