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INDIAN DIRECT SELLING INDUSTRY OUTLOOK 2025



**POWERING INDIA'S RETAIL
ENTREPRENEURIAL
GROWTH**







Mr. Ratnesh Lal
Chairman, IDSA

Message from Chairperson

IDSA (Indian Direct Selling Association)

On behalf of the Indian Direct Selling Association, it is my privilege to present the Annual Report for the Direct Selling Industry in India for FY2025. The year reflects sustained progress and resilience, with the industry continuing to expand its footprint while strengthening its contribution to India's economic and entrepreneurial ecosystem.

The industry has maintained a consistent growth trajectory, reaching an estimated market size of ₹23,000 crore in FY25, supported by sustained consumer demand and expanding participation. With 93.2 lakh active direct sellers, the sector continues to play a significant role in enabling entrepreneurship and livelihood generation across the country.

A structural shift is underway in how the industry operates. Direct selling is increasingly evolving into a hybrid and social commerce-led model, where digital platforms are enhancing reach while personal relationships continue to anchor trust and conversion. At the same time, the role of the direct seller is transitioning from a transactional seller to a trusted advisor, reflecting the growing importance of product knowledge, transparency, and consumer-centric engagement.

The Consumer Protection (Direct Selling) Rules, 2021 (under the CPA, 2019) continue to play a pivotal role in strengthening the ecosystem by institutionalizing transparency, accountability, and consumer safeguards, thereby reinforcing trust across stakeholders.

Looking ahead, the opportunity for the direct selling industry in India remains significant. With increasing digital adoption, rising entrepreneurial aspirations, and a strong trust-based model, the sector is well positioned to scale further and deepen its reach across diverse markets.

I extend my sincere appreciation to Ipsos and the entire IDSA team for their efforts in developing this report, and to all member companies for their continued support and contribution.



**Ms. Amarpreet
Kaur Chawla**
Deputy General
Manager, IDSA

Message from Deputy General Manager **IDSA (Indian Direct Selling Association)**

It is a privilege to present the FY2025 Direct Selling Industry Report, developed through a rigorous and comprehensive research approach in collaboration with Ipsos. This report is designed to provide a holistic, evidence-based perspective on the industry, capturing both its current performance and the structural shifts shaping its future trajectory.

The study is built on a robust hybrid research framework, integrating primary research with direct sellers and consumers alongside secondary analysis of industry and financial data. This approach enables a 360-degree view of the ecosystem, covering market performance, seller behaviour, consumer expectations, and emerging growth drivers.

The report is structured across key themes, examining the evolution of the direct selling model, changing consumer decision drivers, increasing competitive intensity, and the industry's role in enabling livelihoods. It also highlights emerging shifts such as digital integration, social commerce, and the growing importance of trust and personalisation in driving future growth.

With nearly 48% participation from women entrepreneurs within the sector, Direct Selling has emerged as one of the most accessible and flexible business models for women seeking financial independence, leadership opportunities, and sustainable income generation. The industry continues to create pathways for women across urban and rural markets to participate meaningfully in the economy while balancing personal and professional aspirations.

The industry also plays a significant role in strengthening the retail and consumer ecosystem by expanding market access, enabling personalized consumer engagement, and driving last-mile product reach through trusted distributor networks and relationship-led commerce. I would like to thank all participating organizations, direct sellers, and consumers for their valuable inputs, as well as the Ipsos team for their analytical rigour and partnership in delivering this study.



Mr. Deepak H
Partner & India Head,
Ipsos Strategy3

Message from Partner & India Head

Ipsos Strategy3

The global economic landscape continues to evolve rapidly, shaped by shifting consumer priorities, accelerating digital transformation, and persistent macroeconomic uncertainties. In India, this phase has been marked by sustained economic momentum and supported by strong fundamentals. India's GDP grew by 6.5% in FY25, reinforcing its strong economic trajectory.

The Indian direct selling industry has maintained a steady and consistent growth trajectory in FY 2025, reaching an estimated market size of INR 23,000 crore. The industry, comprising over 475 companies, continues to reflect varied performance at an individual company level. While some organisations have accelerated growth and others have experienced moderation, the overall industry trajectory remains positive, underpinned by sustained demand and evolving consumer engagement.

The regulatory environment has also played an important role in strengthening the industry's foundation. The introduction of Consumer Protection (Direct Selling) Rules, 2021 (under the CPA, 2019) has provided greater clarity and structure, defining the roles and responsibilities of direct selling entities and sellers. The framework reinforces transparency, accountability, and consumer protection, contributing to improved trust and confidence across stakeholders and supporting the industry's continued evolution within a more structured ecosystem.

As the industry progresses, emerging themes such as digital integration, the rise of social commerce, and the growing importance of trust and transparency are shaping the next phase of growth. These shifts are enabling companies and sellers to enhance engagement, expand reach, and strengthen consumer relationships in a more connected environment.

This report provides a comprehensive perspective on the Indian direct selling industry, covering market performance, key trends, growth opportunities, consumer behaviour and perspectives of active direct sellers, while outlining the evolving landscape ahead.

We extend our sincere gratitude to all Direct Selling companies, Active Direct Sellers, and Consumers who generously contributed their time and insights to this survey. We also acknowledge and appreciate the IDSA management and team for their partnership with Ipsos as the knowledge partner.



EXECUTIVE SUMMARY

India's direct selling industry has sustained a consistent growth trajectory in FY2025, reaching an estimated market size of ₹23,000 crore. Over the past six fiscal years, the sector has recorded a steady CAGR of 6.5%, demonstrating resilience even as global direct selling markets contracted (1.2% worldwide) and Asia remained nearly flat (0.05%). This positive performance is underpinned by rising consumer demand, an expanding base of active direct sellers (~93.2 lakh individuals), and deeper market penetration across key states—led by Maharashtra, West Bengal, Uttar Pradesh, Karnataka, and Bihar, which together account for nearly half of national direct selling sales.

The industry is undergoing a structural transformation toward a hybrid model, integrating traditional relationship based selling with digital tools and social commerce. WhatsApp and messaging platforms have emerged as primary sales channels, enabling sellers to scale their reach while preserving the trust and personal engagement that define direct selling. This evolution is further supported by a shift from transactional selling to consultative advisory, where product knowledge and transparency drive long term customer loyalty.

The Consumer Protection (Direct Selling) Rules, 2021 (under the CPA, 2019) have established a clear and legally enforce-

able framework for the industry. Together with ongoing oversight by the Central Consumer Protection Authority, these measures help ensure a level playing field for legitimate and responsible businesses.

India's direct selling opportunity remains under-captured. The country ranks 11th globally in direct selling revenue, far below its potential given its population of 1.4 billion and status as the world's fastest growing major economy. Rising digital penetration (over 800 million internet users), growing entrepreneurial aspirations, and increasing consumer preference for trust-based commerce present substantial headroom for expansion.

Looking ahead, the industry's next phase will be shaped by authenticity, personalisation, and artificial intelligence. Companies that invest in digital enablement, seller training, and transparent consumer engagement will be best positioned to unlock India's full direct selling potential. This report provides a comprehensive, data driven roadmap for stakeholders—industry bodies, policymakers, and direct selling entities—to navigate this evolving landscape and drive inclusive, sustainable growth.





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BACKGROUND OF THE STUDY

The **India Direct Selling Association (IDSA)** serves as an **independent self-regulatory body**, overseeing the **Direct Selling** sector in India. Acting as a **liaison between the industry and government bodies**, it **advocates for the interests** of the Direct Selling industry. It also actively advocates for **policies** that foster **sustainable growth, transparency, and consumer protection**. To keep **stakeholders informed**, IDSA publishes an annual **“State of the Industry” report**, offering

insights into **industry size, trends, growth drivers** and **regulatory frameworks**.

For the **Annual Survey FY 2025**, IDSA partnered with **Ipsos**, a **leading global market research and consultancy firm**, to conduct a **detailed study** and develop the report. The study aimed to:

- #1** Assess the current market landscape of the Direct Selling industry in India, including performance across product categories and regions.
- #2** Identify key growth drivers and factors influencing the industry’s expansion.
- #3** Conduct primary research with Direct Sellers to understand their selling patterns, product preferences, and overall business perspective.
- #4** Perform a consumer survey to explore purchasing motivations, identify challenges, and uncover misconceptions related to Direct Selling.

The study employed a **hybrid research methodology**, combining both **primary** and **secondary research**.



Secondary research involved analyzing **financial data** of **Direct Selling** entities from the **Ministry of Corporate Affairs (MCA)** website and reviewing **publicly available articles** and **news clippings** to assess the industry’s **current state**.



Primary research targeted **Direct Selling organizations** to gain insights into **market performance, regulatory barriers, and growth drivers**.



A **survey among Direct Sellers** captured their **perspectives** and experiences, while a **shopper intercept survey** among a **random Consumer sample** was conducted to gauge **consumer awareness** and **perceptions** of **Direct Selling**.





CHAPTER 1

INDUSTRY CONTEXT & MARKET LANDSCAPE

01 | DIRECT SELLING AS INDIA'S RELATIONSHIP RETAIL CHANNEL

India's retail sector is one of the **largest** and **most complex in the world** – a layered ecosystem of **unorganized** kirana networks, **modern organized retail**, rapidly scaling e-commerce, and emerging quick-commerce infrastructure. Valued at approximately **US\$ 1 trillion today** and projected to exceed Rs. 1,37,10,400 crore (US\$ 1.6 trillion) by 2030, it ranks among the fastest-growing retail markets globally. Its scale is matched by its diversity. Far from being a single monolithic channel, India's retail comprises multiple formats that cater to the varied needs, preferences, and purchasing behaviour of over 1.4 billion consumers.

Retail in India can be broadly classified into two categories:

Store-based retail – physical locations where consumers visit to make purchases. This includes traditional kirana stores, supermarkets, hypermarkets, department stores, and exclusive brand outlets.

Direct to consumer retail – all retail activity that occurs without a permanent retail location. Enabled by technology, changing lifestyles, and the demand for convenience, D2C (Direct to consumer) retail is growing steadily.

D2C (Direct to consumer) retail itself is not a single channel; it is an umbrella that encompasses several distinct formats:

Channel	Description
E-commerce	Online marketplaces (Amazon, Flipkart), direct-to-consumer (D2C) websites, and quick-commerce platforms.
Direct selling	Marketing, distribution, and sale of goods or services through a network of independent sellers
Telemarketing / Vending	Sales conducted via telephone or through automated vending machines.

Each of these channels serves a specific consumer need. E-commerce offers unparalleled selection and speed; telemarketing and vending cater to impulse and ultra-convenience purchases. **Direct selling, however, occupies a unique position within this landscape: it combines the personal trust and demonstration of traditional retail with the flexibility and reach of D2C (Direct to consumer) formats.**

Direct Selling: The “Relationship Retail” Channel

Direct selling is an integral part of the retail industry and is explicitly classified under direct to consumer retail, involving marketing and sales through independent sellers without fixed locations, often face-to-face or via networks. In India, it operates as a primary D2C channel, distributing consumer goods like wellness products, cosmetics, and household items through personal interactions at homes or workplaces. Globally and locally, it emphasizes **interactive, trust-based commerce**, differentiating it from **e-commerce’s transactional model** while scaling entrepreneurship at the grassroots level.

Within this ecosystem, direct selling occupies

a position that no other channel can replicate: it is simultaneously a commerce model, an employment model, and an entrepreneurship model.

Unlike traditional transactional retail, direct selling functions as **“Relationship Retail.”** It is the only retail format that **creates a dual economic impact: providing consumers with guided and interactive purchasing experiences, while simultaneously fostering entrepreneurship at scale.** This model transforms from “product delivery” into “advocacy,” where the seller’s personal trust and product expertise drive conversion and long-term loyalty.

National Industrial Classification (NIC 2008, Group 479):

“Other retail sale not in stores, stalls or markets.” This includes “retail sale of any kind of product... by direct sales or door-to-door sales persons, through vending machines etc.”

Consumer Protection Act, 2019:

Defines direct selling as “marketing, distribution and sale of goods or provision of services through a network of sellers, other than a permanent retail location.”

Source:

<https://www.ibef.org/industry/retail-india>

https://www.ncs.gov.in/Documents/NIC_Sector.pdf

<https://www.pib.gov.in/PressReleasePage.aspx?PRID=1785873®=3&lang=2>



02 | INDIA DIRECT SELLING INDUSTRY FY 2025

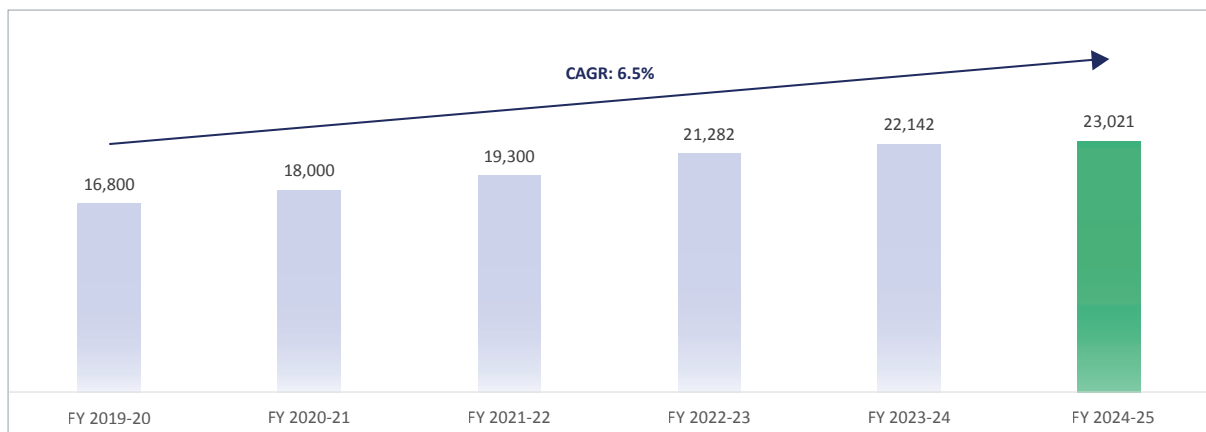


Figure 1. India Direct Selling Industry Size FY 2019-20 to FY 2024-2025 (in INR crores)

India's direct selling industry has shown **consistent and steady expansion**, reaching a market size of **₹23,021 crore in FY2025**. Over the past six years, the industry has grown at a **CAGR of 6.5%**, reflecting a sustained upward trajectory.

This performance becomes more relevant when viewed in a global context. According to the latest WFDSA data, the worldwide direct selling industry recorded a 3-year CAGR (2021 to 2024) of -1.2%, while the Asia region posted a marginal decline of -0.3%. In this challenging global environment, **India has emerged as one of the few major markets delivering consistent positive growth**, indicating stronger underlying demand dynamics.

At the same time, growth within the industry is **not uniform**, with leading players expanding at a faster pace than the broader market. This reflects a shift towards **scale-led growth**, where established companies are leveraging stronger distribution, brand equity, and capabilities to

capture a larger share of incremental value. This dynamic also highlights an evolving opportunity for **emerging players**. Companies that invest in **digital tools, training, seller enablement, and social commerce approaches** are better positioned to improve reach, productivity and competitiveness.

The industry's progression reflects **consistency at scale**, supported by sustained consumer demand and continued participation. This positions direct selling as a **reliable contributor within India's D2C (Direct to consumer) retail ecosystem**.

This steady trajectory, combined with strengthening structural enablers, indicates **clear headroom for further expansion**, as the channel continues to evolve and deepen its presence across markets.

Source: <https://wfdsa.org/wp-content/uploads/2025/12/WFDSA-STATS-Report-2024-2025-V1.pdf>

INDIA PRODUCT-WISE % SHARE OF DIRECT SELLING INDUSTRY (FY 2025)

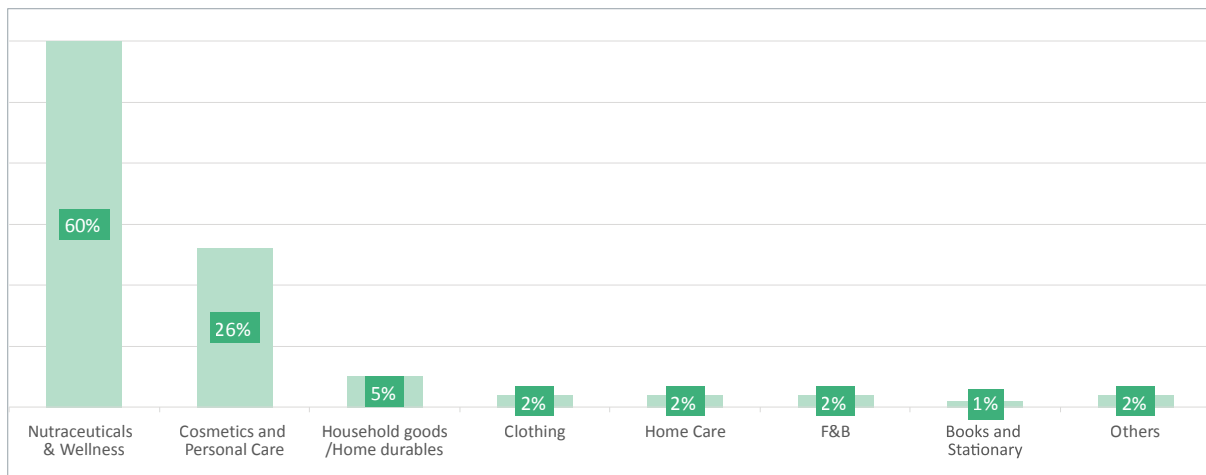


Figure 2. % of sales contribution across different product categories

The product mix of the Indian direct selling industry reflects its core strengths while also revealing emerging opportunities.

The Nutraceuticals & Wellness segment led the India Direct Selling market in FY 2025, contributing 60% of total sales, followed by Cosmetics & Personal Care at 26%. Together, these two categories accounted for 86% of the industry's total sales. Household goods ranked third with a 5% share, bringing the combined contribution of the top three categories to 91%, underscoring their market dominance.



SHARE OF PRODUCT CATEGORIES FY 2020 TO FY 2025

In FY 2025, **Wellness** continued to anchor the Indian direct selling industry, accounting for **60%** of total sales—reinforcing its role as

the primary growth engine and consumer entry point. **Cosmetics & Personal Care** followed with a **26%** share, underscoring the sustained demand for beauty and self-care products.

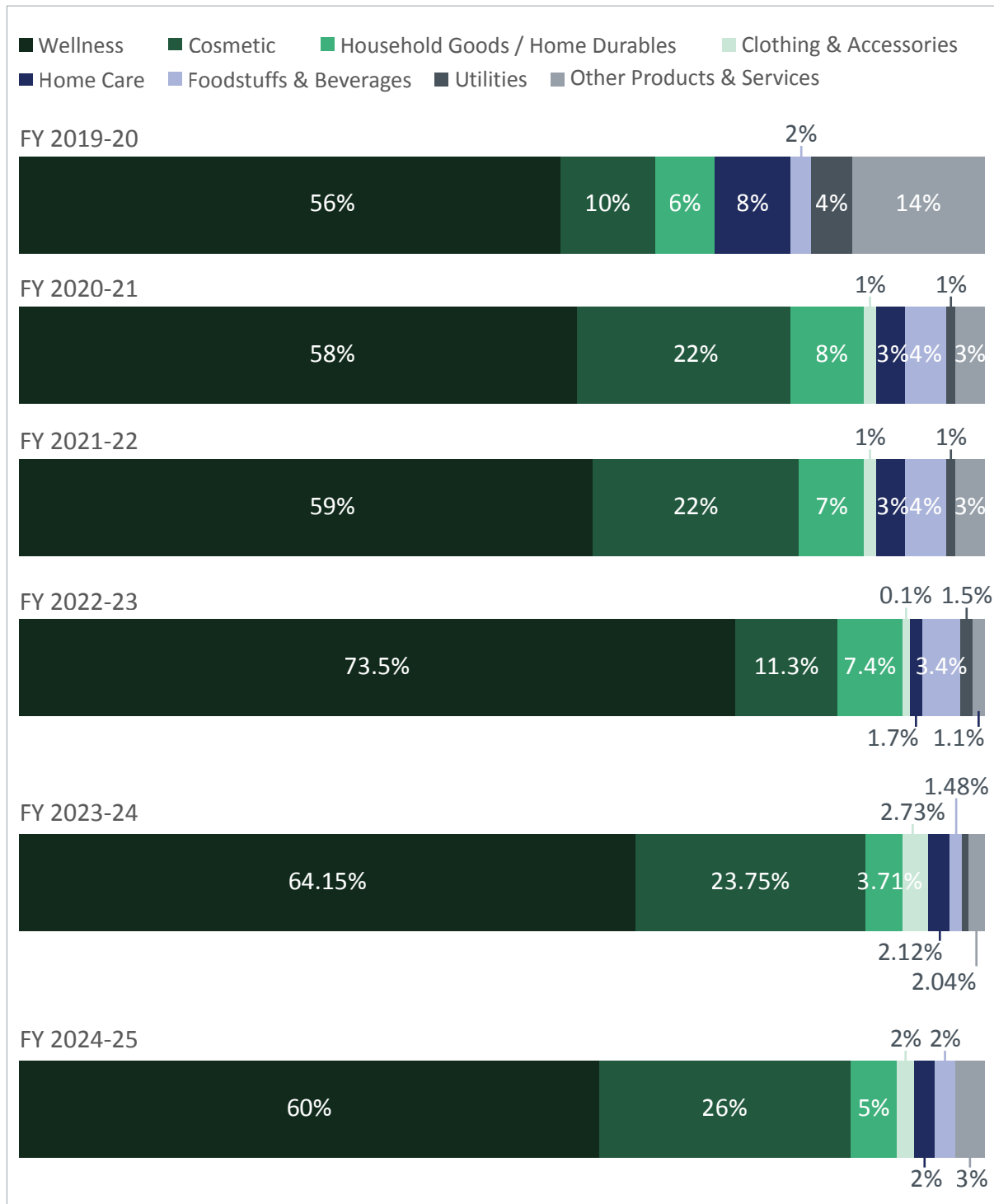


Figure 3. % of sales contribution across different product categories FY 2019-20 to FY 2024-2025

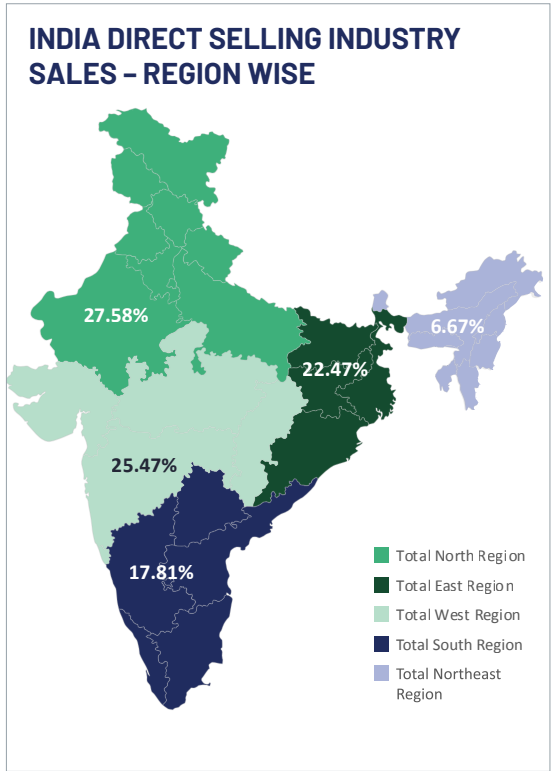


Figure 4. Zone wise contribution to Direct selling Industry sales in FY 2025

The regional distribution of India’s direct selling industry in FY 2025 reflects a **broad-based presence across the country**, with each region contributing meaningfully to overall industry performance.

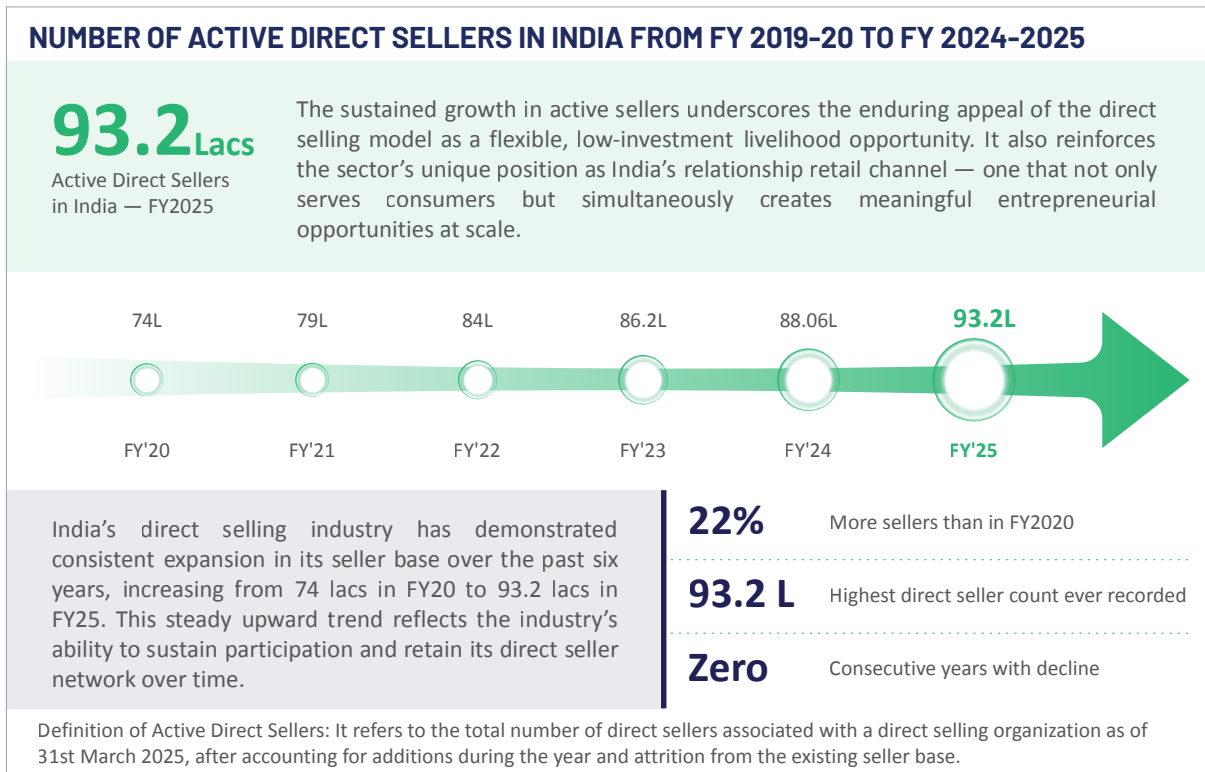
The **Northern region** accounted for the largest share of direct selling sales, contributing **27.58%** of the total market. This region comprises **Uttar Pradesh, Rajasthan, Punjab, Haryana, Uttarakhand, Delhi, Himachal Pradesh, Jammu & Kashmir, and Chandigarh**, led the market.

The **Western region** ranked second, accounting for **25.47%** of the market. The region includes **Maharashtra, Gujarat, Madhya Pradesh, Chhattisgarh, Goa** and the Union Territories of **Dadra & Nagar Haveli**.

The **Eastern region** accounted for **22.47%** of total sales, largely driven by **West Bengal**, which alone contributed **10.9%** to the national turnover. Other key states in this region include **Bihar, Jharkhand, and Odisha**.

The **Southern region** contributed **17.81%** to the total gross sales, with representation from **Tamil Nadu, Karnataka, Andhra Pradesh, Telangana, Kerala, Puducherry** and the Union Territories of **Andaman & Nicobar**.

Lastly, the **Northeastern region**, consisting of eight states - namely **Assam, Arunachal Pradesh, Manipur, Meghalaya, Mizoram, Nagaland, Sikkim, and Tripura**, collectively accounted for **6.67%** of the total sales.



**INDIA DIRECT SELLING SALES AND NUMBER OF ACTIVE DIRECT SELLERS:
STATE-WISE (FY 2025)**

State & Union Territory	Direct Selling Sales (INR Crore)	Share in India Direct Selling Sales	Number of Active Direct Sellers (Lakhs)
Uttar Pradesh	2,030.20	8.82%	13.17
Haryana	852.8	3.70%	2.68
Delhi	1,271.70	5.52%	1.86
Rajasthan	702.1	3.05%	3.49
Punjab	791.1	3.44%	1.84
Uttarakhand	372.8	1.62%	0.99
Jammu & Kashmir	149.3	0.65%	0.4
Chandigarh	56.6	0.25%	0.18
Himachal Pradesh	122.9	0.53%	0.56
Total North Region	6,349.50	27.58%	25.17
West Bengal	2,504.30	10.88%	9.69
Bihar	1,291.30	5.61%	8.96
Odisha	1,024.60	4.45%	6.54
Jharkhand	352.2	1.53%	2.94
Total East Region	5,172.40	22.47%	28.13
Maharashtra	3,525.70	15.31%	11.16
Gujarat	973.7	4.23%	2.74
Madhya Pradesh	656.3	2.85%	4.12
Chhattisgarh	686.6	2.98%	3.38
Goa	19.4	0.08%	0.15
Dadra & Nagar Haveli	3.5	0.02%	0.02
Total West Region	5,865.20	25.47%	21.57
Karnataka	1,467.30	6.37%	3.16
Tamil Nadu	897.9	3.90%	3.38
Kerala	606.5	2.63%	2.25
Telangana	650.8	2.83%	2.22
Andhra Pradesh	397.6	1.73%	2.85
Pondicherry	65.9	0.29%	0.11
Andaman and Nicobar Islands	14.4	0.06%	0.09
Total South Region	4,100.40	17.81%	14.06
Assam	877.4	3.81%	1.91
Manipur	197.7	0.86%	0.28
Nagaland	143.3	0.62%	0.53
Mizoram	128.3	0.56%	0.53
Arunachal Pradesh	56.6	0.25%	0.41
Tripura	89.6	0.39%	0.29
Meghalaya	26.6	0.12%	0.23
Sikkim	14	0.06%	0.09
Total Northeast Region	1,533.50	6.67%	4.27
Total India	23,021	100.00%	93.2

Table 1. State wise direct selling sales (in INR crore) and number of active direct sellers (in lakhs).

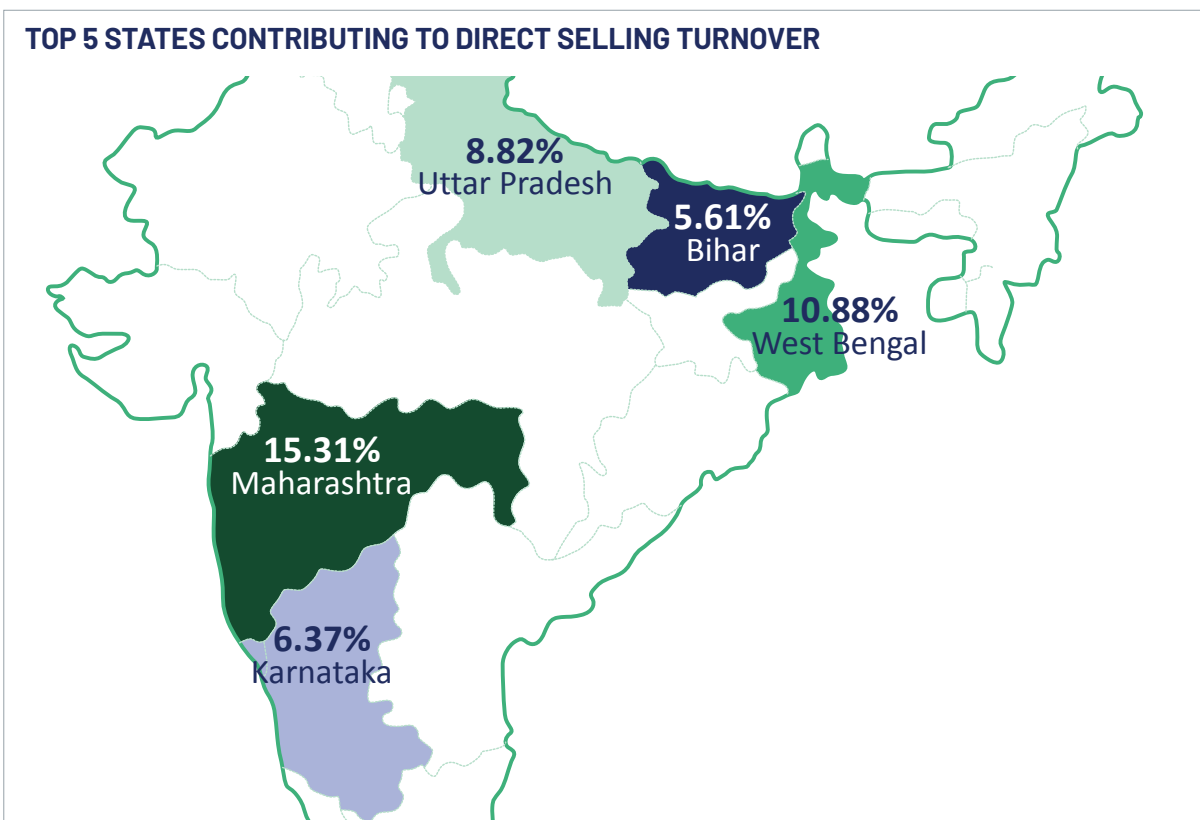


Figure 5. State wise contribution to Direct selling Industry sales across the top 5 states in FY 2024-2025

In FY 2025, the Indian direct selling industry's sales were anchored by a group of leading states, with **Maharashtra, West Bengal, Uttar Pradesh, Karnataka, and Bihar collectively contributing ~47% of total sales.**

The strong contribution from these states reflects a combination of **robust consumer demand, well-established seller networks, and deeper market penetration**, positioning them as key drivers of direct selling activity across the country.

In addition, states such as **Delhi, Odisha, Gujarat, Tamil Nadu, and Assam collectively account for a further ~22%**, highlighting their increasing contribution to the industry's scale and growth.

DIRECT SELLING SALES CONTRIBUTION - NORTH REGION FY 2025

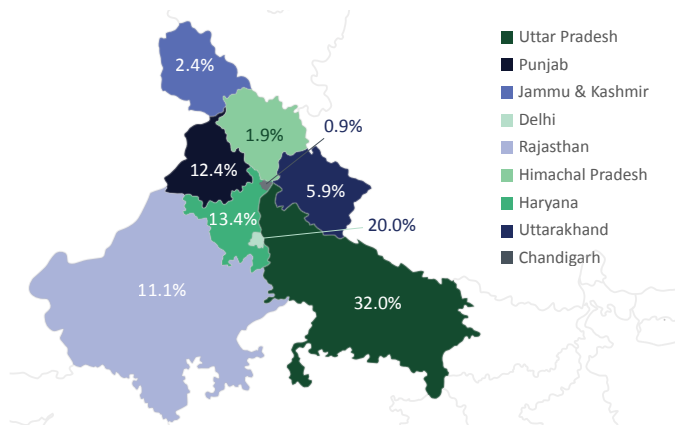


Figure 6. Contribution of states in the Northern region to Direct selling Industry sales in FY 2025

Within the Northern region, **Uttar Pradesh emerged as the leading contributor, accounting for 32% of total regional direct selling sales.** This was followed by **Delhi at 20% and Haryana at 13.4%**, with **Punjab (12.4%) and Rajasthan (11.1%)** also making substantial contributions.

Together, these states reflect a **well-balanced distribution of sales within the region**, with multiple markets contributing meaningfully to overall performance.

DIRECT SELLING SALES CONTRIBUTION - EAST REGION FY 2025

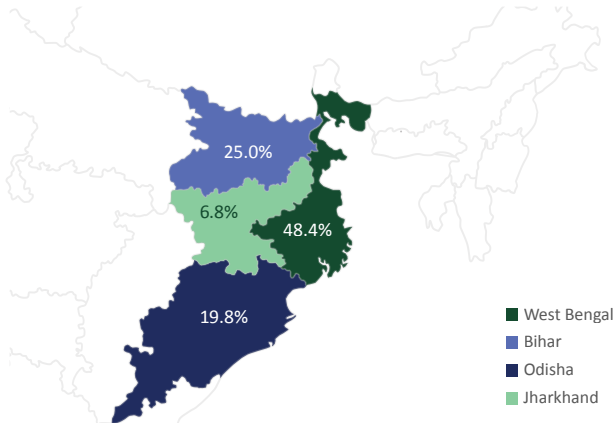


Figure 7. Contribution of states in the Eastern region to Direct selling Industry sales in FY 2025

Within the **Eastern region, West Bengal dominated direct selling sales, capturing 48.4% of the market share,** followed by **Bihar at 25%, Odisha at 19.8%, and Jharkhand at 6.8%.**

DIRECT SELLING SALES CONTRIBUTION - WEST REGION FY 2025

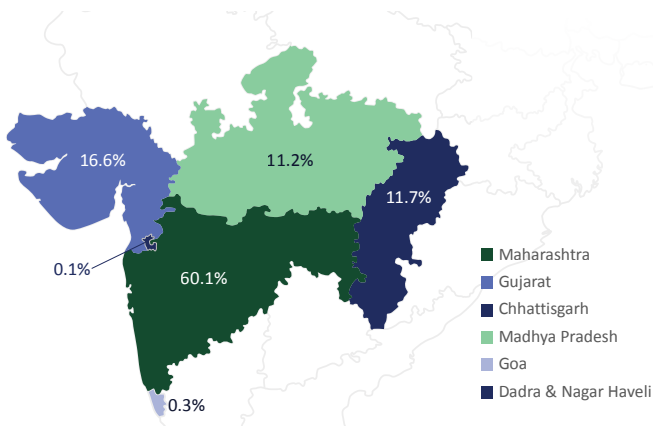
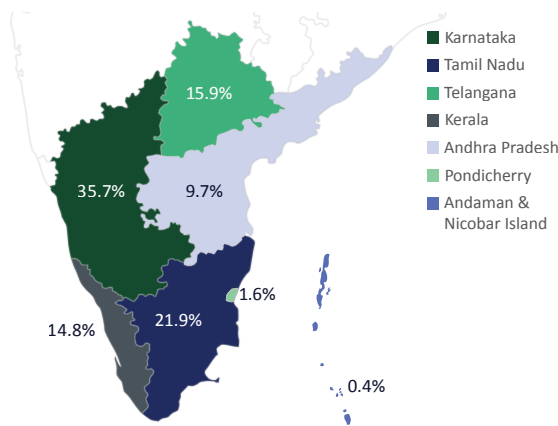


Figure 8. Contribution of states in the Western region to Direct selling Industry sales in FY 2025

In the Western region, **Maharashtra stands out as the primary driver of direct selling sales, contributing ~60% of the total regional share.** It is followed by **Gujarat at 16.6%**, with **Chhattisgarh (11.7%) and Madhya Pradesh (11.2%)** playing significant roles.



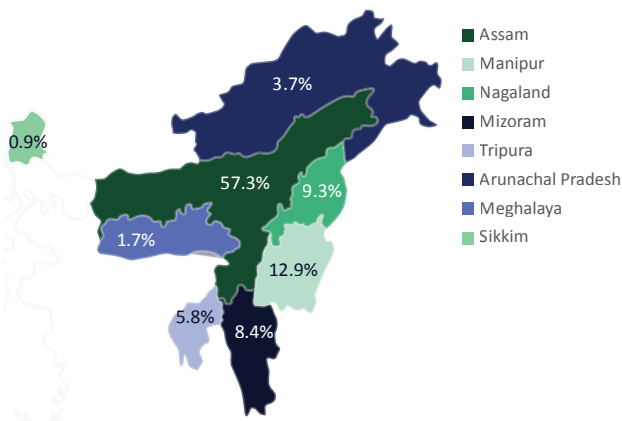
DIRECT SELLING SALES CONTRIBUTION – SOUTH REGION FY 2025



Karnataka, Tamil Nadu, and Telangana emerged as the core growth engines of the Southern region, jointly contributing 73.5% of direct selling sales and shaping the overall regional market dynamics.

Figure 9. Contribution of states in the Southern region to Direct selling Industry sales in FY 2025

DIRECT SELLING SALES CONTRIBUTION – NORTHEAST REGION FY 2025



In the Northeast region, Assam leads the direct selling market with a 57.3% share, followed by Manipur (12.9%) and Nagaland (9.3%), indicating a strong concentration of sales within these key states.

Figure 10. Contribution of states in the North-eastern region to Direct selling Industry sales in FY 2025

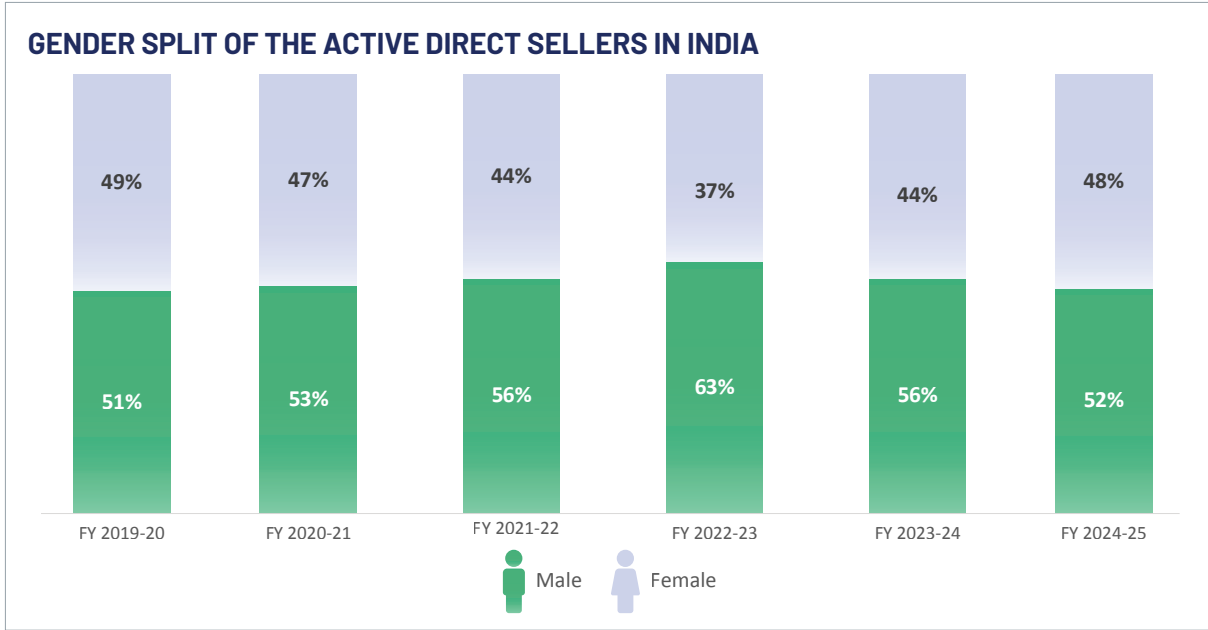


Figure 11. Gender split of the Active Direct Sellers in India

As of FY 2025, the active direct seller population in India is distributed as **52% male and 48% female**.

The **gender distribution** of active direct sellers in India reveals a pronounced recovery in female participation over recent years. After declining to a **six-year low of 37%** in **FY 2022-23**, the share of

women sellers has rebounded sharply, reaching **48%** in **FY 2024-25** - nearly restoring parity with **male sellers** and reflecting the industry's **renewed momentum in engaging women as direct selling professionals**.

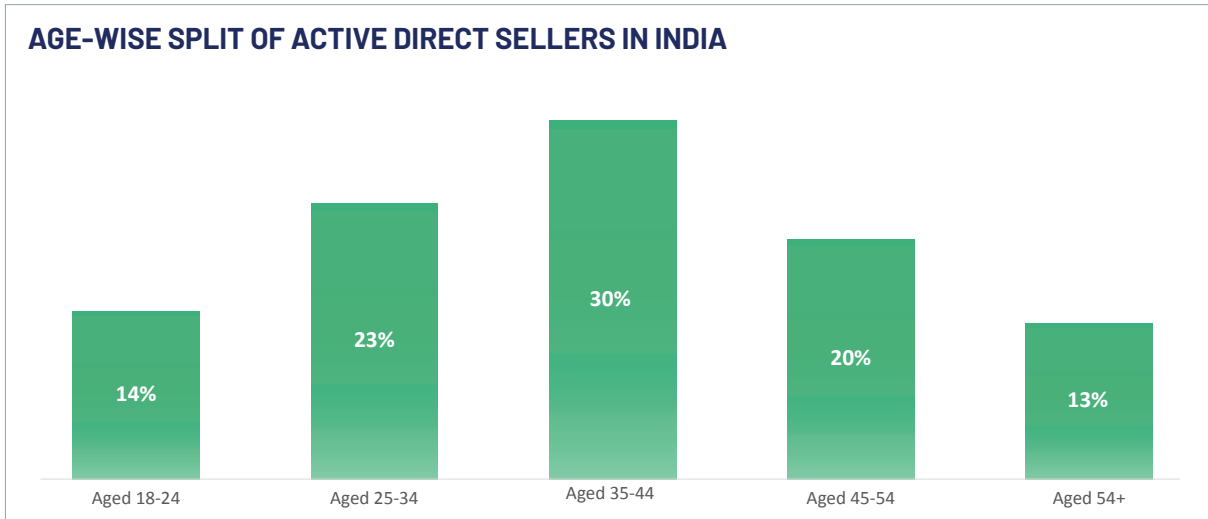


Figure 12. Age-wise split of the Active Direct Sellers in India

Among the 93.2 lakh active direct sellers, the **largest share (73%)** belonged to the **25-54 age group**. At the same time, participation from **younger (18-24 age group: 14%)** and **senior (54+ aged: 13%) cohorts** reflects the industry's **broad generational appeal and accessibility across life stages**.





03 | INDIA'S DIRECT SELLING OPPORTUNITY REMAINS UNDER-CAPTURED

THE GLOBAL BENCHMARKING PICTURE

India's direct selling opportunity **remains substantially under-captured when viewed against the scale of the country's consumer base**. India is the world's most populous country (~1.4 billion population) and the **fastest growing economy**, but it **ranks 11th globally in direct selling revenue** (WFDSA Global Direct Selling Report, FY24). While this reflects a meaningful presence on the global stage, it also underscores the **significant untapped potential** in a market characterized by immense scale, diversity, and complexity.



Mr. Abhishek Gupta,
Managing Director,
Altos Enterprises
Private Limited

"The future of direct selling in India is exceptionally promising, driven by Digital adoption, Rising entrepreneurial aspirations, and supportive regulatory frameworks. It has the potential to generate large-scale employment and foster inclusive growth. As awareness and trust continue to grow, the industry is set to become a key pillar of the economy."

OPPORTUNITY EXISTS

This gap between **market size** and **market potential** is the core of the opportunity. India's direct selling sector has already moved beyond an early-stage phase: **it is formally recognized under the Consumer Protection (Direct Selling) Rules, 2021**, and is now **operating within a clearer compliance and consumer-protection framework**.

WFDSA Global Direct Selling Country-wise ranking			
Rank	Market		2024 Retail Sales (USD Mn)
1		United States	\$34,740
2		Germany	\$19,050
3		China	\$15,546
4		Korea	\$15,065
5		Malaysia	\$10,197
6		Japan	\$9,581
7		Brazil	\$7,844
8		Mexico	\$6,842
9		France	\$4,714
10		Taiwan	\$4,564
11		India	\$3,528

ENABLERS THAT COULD ACCELERATE CAPTURE

3.1 - RISING DIGITAL PENETRATION

India now has over **800 million internet users**, and smartphone adoption continues to expand in rural areas. **Direct selling's hybrid model—combining digital tools with personal relationships**—is uniquely positioned to leverage this connectivity. **Platforms like WhatsApp and social media are already the primary sales channels** for many sellers, but there is headroom to scale these digital capabilities further.



3.2 - GROWING PREFERENCE FOR TRUST-BASED COMMERCE

As consumers become wary of **impersonal online marketplaces and counterfeit products**, the TRUST quotient of direct selling becomes a **competitive advantage**. The Consumer Protection (Direct Selling) Rules, 2021 (under the CPA, 2019), with their emphasis on **transparency, grievance redressal, and accountability**, provide a regulatory framework that reinforces consumer confidence. This trust advantage can be converted into higher market share.



3.3 - ENTREPRENEURIAL ASPIRATIONS

India has a growing gig economy. Direct selling offers a **low-risk, flexible entrepreneurial path**. With targeted training and digital enablement, the industry can attract a larger share of the country's aspiring micro-entrepreneurs—particularly women, youth, and those in semi-urban and rural areas.







CHAPTER 2

EVOLUTION OF THE DIRECT SELLING MODEL

04 | THE RISE OF THE 'SOCIAL COMMERCE' MODEL

DIRECT SELLING IS EVOLVING INTO A SOCIAL COMMERCE MODEL

A clear shift is emerging in channel dynamics, with **WhatsApp and digital messaging platforms now emerging as the primary sales channels** for both direct sellers and consumers. At the same time, **in-home demonstrations continue to play a significant role**, with 65% of sellers identifying them among their top channels in FY25. However, this represents a decline from 76% in FY24, indicating a gradual transition.

This trend suggests that while **face-to-face engagement remains a core strength of the direct selling model**, sellers are increasingly **diversifying their approach** by integrating digital channels, enabling broader reach and more flexible consumer engagement.



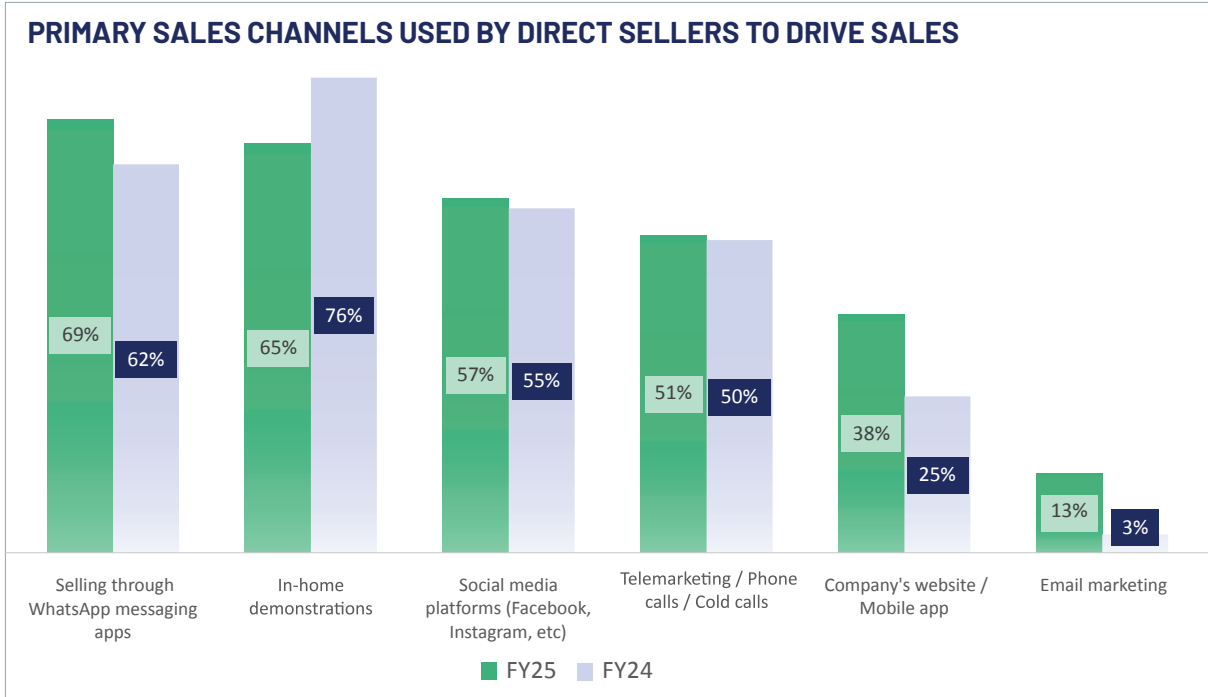


Figure 13. Primary Sales Channels Utilized by Direct Sellers

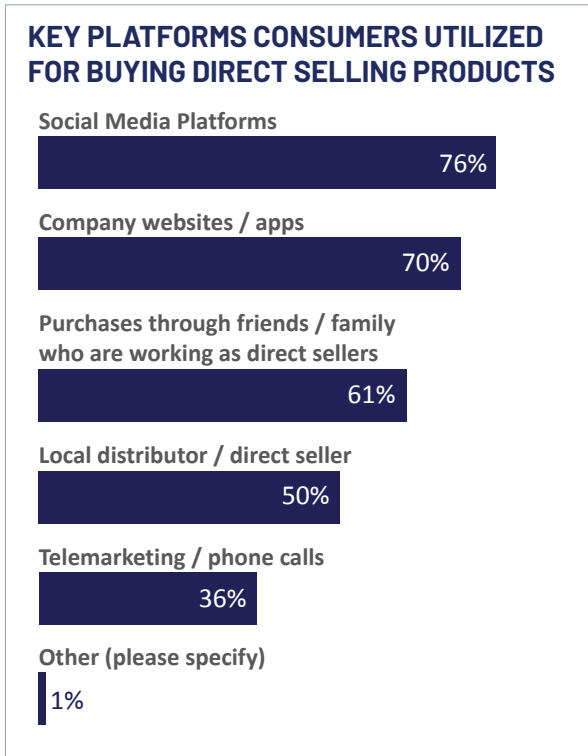



Figure 14. Preferred Platforms for Purchasing Direct Selling Products



Sundeep Matharoo,
Head - Direct Sales,
Avon India

“The Indian direct selling industry is rapidly shifting towards digital, but human connection and face-to-face engagement remain its strongest foundation”

Direct selling in India is transitioning from a “push-based, field-centric model” to a “pull-led, hybrid commerce model”, where digital channels initiate engagement and personal relationships close the sale. This convergence of platform scalability and human trust is emerging as a defining characteristic of the industry’s next phase of growth.

SOCIAL COMMERCE: AMPLIFYING RELATIONSHIP RETAIL AT SCALE

Social commerce is emerging as a significant shift in India's commerce landscape. It represents the **seamless integration** of discovery, evaluation, and purchase within the single social platform. Consumers discover products through creator content, friends' recommendations, or brand stories in their feed; they evaluate them through real-time comments, live demonstrations, and peer validation; and they complete the purchase without leaving the application. **It bridges the gap between "personal touch" and "digital convenience"** — offering live product demonstrations, one-click chat-based ordering, and social proof through testimonials.

Direct selling is increasingly evolving towards a social commerce-led model, where product discovery, engagement, and purchase are seamlessly integrated within social and digital platforms. Unlike traditional e-commerce, which is largely transaction-driven, social commerce is interaction-led, combining platform reach with the trust inherent in personal networks.

This evolution represents a natural extension

of the direct selling model. **At its core, direct selling has always been built on relationships, recommendations, and community-driven influence—principles that closely mirror how social commerce operates.** Social platforms such as messaging apps and social media now enable sellers to scale these interactions, allowing them to engage with a wider audience while retaining the personalized nature of communication.

From a strategic perspective, social commerce is becoming a key growth lever for the industry, **enabling greater reach, faster engagement, and more seamless conversion journeys.** Companies that invest in enabling sellers with digital tools, content capabilities, and platform integration will be better positioned to scale efficiently, while **maintaining the trust-driven foundation that defines direct selling.**



Samir K. Modi,
Managing Director,
Modicare

"I believe direct selling in India is entering a new phase of evolution, one that is digitally enabled, entrepreneurial, and future-ready. Organizations that empower individuals to build personal brands, leverage social commerce, and create sustainable income streams will lead this transformation. This shift will unlock the sector's full potential as a powerful engine for livelihood generation at scale."



05 | THE EVOLUTION FROM SALESPERSON TO TRUSTED ADVISOR

THE DIRECT SELLER IS EVOLVING FROM SELLER TO ADVISOR

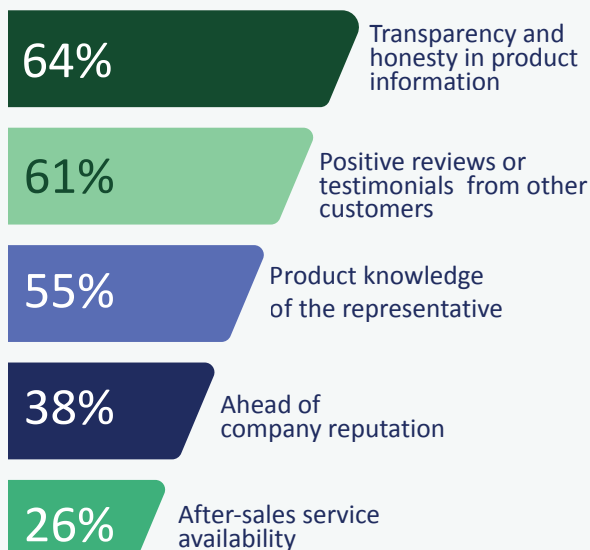
Today's direct selling consumer approaches the seller already informed—after researching on YouTube, Instagram, Amazon, Flipkart,

and WhatsApp. Most consumers research online before buying, particularly in health and personal care categories. The seller's role is therefore to interpret needs, offer personalized recommendations, provide trusted validation, and drive repeat purchases.

WHAT BUILDS TRUST IN THE DIRECT SELLING INDUSTRY? - CONSUMER PERSPECTIVE

Transparency and honesty in product information	64%
Positive reviews or testimonials from other customers	61%
Quality of the products or services offered	56%
Product knowledge of the representative	55%
Clear product pricing and return policies	51%
Experience or recommendations from other customers	50%
Easy return/refund process	46%
Professionalism of the representative	44%
Reputation of the company / brand	38%
Availability of support or after - sales service	26%

On the consumer side, the trust driver hierarchy tells a clear story:



Consumers are explicitly valuing the seller's knowledge and credibility, not merely their social relationship or the product brand. The seller who can accurately advise on which wellness supplement is appropriate for a specific health profile, or which skincare product is right for a particular skin type, is delivering a service that has genuine and measurable value to the consumer.

The Consultative Selling Model Key Advantages

1 PERSONALIZED GUIDANCE

First, it **enhances conversion quality**—personalised guidance helps consumers choose the right products, **leading to higher satisfaction and stronger repurchase intent (72% in wellness and 71% in cosmetics)**.



2 CUSTOMER CENTRIC

Second, it **drives retention on both sides**—**consumers return to sellers** who understand their needs, while **sellers remain invested** due to the long-term value of their established client relationships.





CHAPTER 3

TRUST, VALUE & CONSUMER DECISION DRIVERS

06 | TRUST IS BUILT THROUGH TRANSPARENCY AND ACCOUNTABILITY

Trust in direct selling is shifting from **assertion to verification**. Consumers increasingly rely on **transparent product information, peer reviews, and social validation**, applying the same trust filters as e-commerce—**evidence over claims and experience over messaging**.

This shift is backed by a **scientific and quality-first approach**. Leading direct selling entities invest in research and development (R&D), clinical testing, and third-party quality certifications. Product formulations, wellness/ nutritional supplements, and personal care items are often developed in collaboration with in-house scientists or external research institutions. R&D is not an afterthought

– it is central to product differentiation, safety validation, and long-term consumer trust.

This shift is reflected on the seller side, with **62% citing negative public perception as a key challenge** and **41% highlighting the lack of independent reviews as a barrier**. As a result, effectiveness now depends on the ability to **demonstrate credibility through transparency, product knowledge, and verifiable proof**, rather than relying on persuasion alone.

CONSUMER DECISION DRIVERS



4/5

Overall Trust Score

Consumers demonstrate strong baseline trust in the direct selling industry — a solid reputational foundation to build upon.

64%

Trust Transparency First

Transparency and honesty in product information is the single most cited trust driver among direct selling consumers.

61%

Rely on Peer Reviews

Verified testimonials and peer reviews rank as the second-highest trust driver, underscoring the power of social proof.



Puneet Madan,
Regional Vice President
& Managing Director,
USANA India

The rise of preventive health marks a structural shift in consumer expectations as people no longer seek products, they demand proof. While direct selling is inherently built on education, true leadership will be defined by scientific credibility and uncompromising integrity. At USANA, our commitment is anchored in rigorous research and clinical excellence. In this new paradigm, trust is the only currency and science is the only way to earn it.

07 | THE CONSUMER PROTECTION ACT REGULATION PRESENTS AN OPPORTUNITY TO STRENGTHEN CONFIDENCE

Strong regulatory frameworks provide an opportunity to strengthen industry credibility

The Direct Selling Rules, 2021 (under the CPA, 2019) establish a clear framework to ensure ethical companies are in the ecosystem, improve transparency, and protect both consumers and legitimate sellers. Effective awareness and enforcement of these rules can play a critical role in improving trust in the sector.



Figure 15. Key Challenges Faced by Direct Sellers

THE REGULATORY ANTIDOTE

Consumer Protection (Direct Selling) Rules, 2021 (framed under the Consumer Protection Act, 2019)

- Defining the boundaries of legitimate Direct Commerce
- Institutionalizing consumer protection frameworks
- Requires seller ID & written contracts
- Enforces transparent pricing & return policies
- Prohibits fake reviews & misleading income claims
- Creates grievance redressal mechanisms



FROM CHALLENGE TO COMPLIANCE: HOW THE DIRECT SELLING RULES 2021, PROTECT SELLERS & CONSUMERS



62%

Cite Negative Perception



48%

Impacted by Ponzi/
Fly-by-Night Schemes



#1

Most Critical Challenge



THE PROBLEM

Public understanding of direct selling in India has historically lacked clarity, particularly around the distinction between structured, compliant business models and non-compliant practices.

As a result, **perception gaps have persisted**, influencing trust and consideration among consumers and stakeholders.

REGULATORY SOLUTION –

- **Establishes clear guidelines** that distinguish direct selling from non-compliant models.
- **Enhances transparency** by restricting non-compliant participation within the ecosystem.
- **Mandatory self-declaration** by each direct selling company.
- Statutory definition of what is NOT direct selling – enabling regulators & consumers to identify non-compliant operators.

HOW IT HELPS

Establishes a clear and enforceable framework that strengthens the distinction between compliant direct selling and non-compliant practices, with self-declaration requirements enhancing transparency and accountability across the ecosystem.



FROM CHALLENGE TO COMPLIANCE: HOW THE DIRECT SELLING RULES 2021, PROTECT SELLERS & CONSUMERS



58%
E-Commerce /
Quick-Commerce



#2
Challenge



THE PROBLEM

Customers now expect same-day delivery, easy returns, and transparent pricing – standards set by billion-dollar tech platforms that direct sellers simply cannot match on their own.

At the same time, **product availability across multiple channels** reduces perceived exclusivity, making it important for sellers to differentiate through **engagement, trust, and service experience**.

REGULATORY SOLUTION –

- Direct Selling Entities (DSEs) **are not permitted to sell** products on third-party e-commerce platforms under the direct selling model.
- Direct selling entities can sell products on their own website, and they **must comply with Consumer Protection (e-Commerce) Rules, 2020** – creating a hybrid compliance framework.
- **Mandatory display of total price.**
- Consumers must be informed of delays and granted the right to cancel for a full refund.

HOW IT HELPS

When direct selling moves online through its own compliant channels, it plays by the same rules as all e-commerce players – **levelling the playing field and building consumer confidence**. Transparent pricing and return policies reduce buyer hesitation, while the grievance redressal creates accountability that rivals the service standards of large platforms.



FROM CHALLENGE TO COMPLIANCE: HOW THE DIRECT SELLING RULES 2021, PROTECT SELLERS & CONSUMERS

 **41%**
Lack of Online Reviews

 **#5**
Challenge



THE PROBLEM

In a digital world where consumers trust star ratings, **direct selling products often lack verified social proof** – putting sellers at a **disadvantage versus e-commerce alternatives** where reviews are abundant and visible.

REGULATORY SOLUTION –

- The Consumer Protection (Direct Selling) Rules, 2021 (under the CPA, 2019), strengthen consumer confidence by encouraging direct selling entities to maintain transparency, provide authentic reviews, and communicate product quality and features accurately.

HOW IT HELPS

This builds integrity into the review ecosystem – assuring consumers that reviews they see are genuine and holding companies accountable for authentic product representations.



Provision **The Direct Selling Rules, 2021 (Under the CPA, 2019)**

Applicability of Rules	Applies to all direct selling models, entities, and goods/services sold in India, including foreign entities selling to Indian consumers; also covers unfair trade practices.
Product Trademark Compliance	Direct Selling Entities (DSEs) are required to own or hold a valid license for the trademarks of the products they sell, and can offer incentives only on such authorized products. This ensures accountability and product authenticity.
Codifying the “Direct Commerce” Standard	The Consumer Protection (Direct Selling) Rules, 2021 (under the CPA, 2019) establish clear eligibility and operating guidelines for direct selling, ensuring that entities adhere to defined standards of transparency, accountability, and consumer protection, so that only legitimate and properly structured businesses are permitted to operate within the ecosystem.
State Government Oversight	State Governments are required to establish monitoring mechanisms to supervise activities of direct sellers and entities.
Contract and Verification of Direct Sellers	Mandatory written agreement ensuring fair, transparent, and legally binding terms between entity and seller. Also, entities must verify the identity and address of sellers and issue ID cards to ensure accountability.
Liability for Consumer Grievances	Direct selling entities are liable for complaints arising from sales made by their direct sellers.
Website Disclosure Requirements	Entities must provide transparent information on their website: company details, pricing breakdown, policies (refund, return, warranty), grievance mechanism, and payment details.
Grievance Redressal Mechanism	Appoint a grievance officer; complaints acknowledged within 48 hours and resolved within 1 month.
Nodal Officer Appointment	Entities must appoint a nodal officer responsible for regulatory compliance and coordination with authorities.
Transparency in Advertising	Advertisements must reflect true product characteristics; fake reviews or misleading claims are prohibited.
After-Sales Service Disclosure	Clear information on after-sales service, warranty, and support must be provided.

Source: <https://www.pib.gov.in/PressReleasePage.aspx?PRID=1785873®=3&lang=2>

Building Trust Through Regulatory Reform: The Road Ahead

- **Increase awareness among direct sellers, consumers, and stakeholders** regarding the provisions and safeguards established under The Consumer Protection (Direct Selling) Rules, 2021 (under the CPA, 2019), **enabling better understanding of rights, responsibilities, and grievance redressal mechanisms.**
- Industry bodies and direct selling companies can actively promote adherence to The Consumer Protection (Direct Selling) Rules, 2021 (under the CPA, 2019) as a clear marker of **legitimacy, transparency, and responsible business conduct.** This helps businesses distinguish themselves through their commitment to regulatory standards and ethical practices.
- Companies to **invest in training direct sellers** on regulatory obligations, consumer rights, direct seller rights and responsibilities, and proper conduct standards.
- Continued enforcement by the Central Consumer Protection Authority (CCPA) to uphold consumer rights and maintain a clean, trustworthy direct selling environment—benefiting legitimate businesses and responsible sellers.
- **Industry stakeholders can monitor consumer trust and perception metrics** over time to assess the impact of regulatory awareness, compliance efforts, and enforcement actions on the credibility of the direct selling sector.





CHAPTER 4

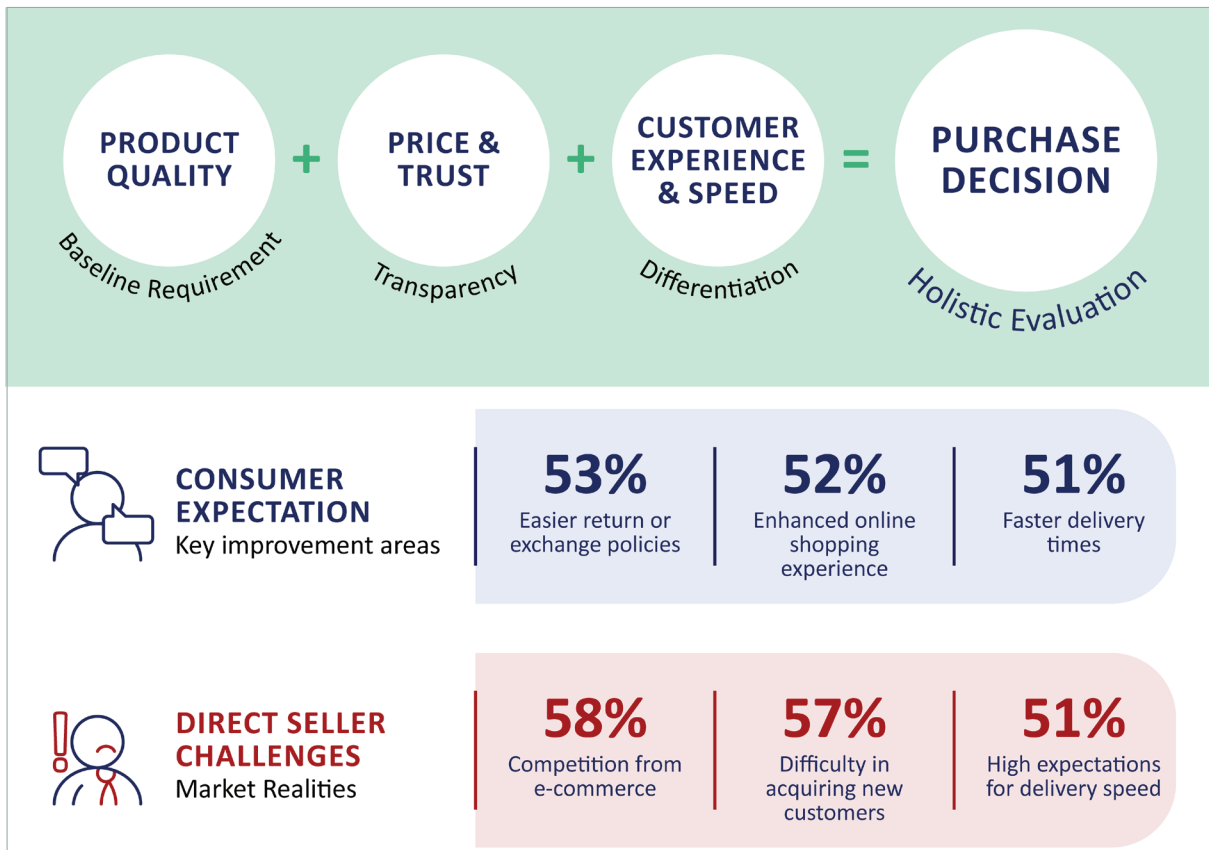
EXPERIENCE GAPS & COMPETITIVE INTENSITY

08 | CONSUMERS ARE EVALUATING VALUE MORE HOLISTICALLY

CUSTOMER EXPERIENCE IS EMERGING AS A KEY DIFFERENTIATOR

A clear shift in **consumer expectations** has emerged, largely **shaped by the rise of e-commerce and quick-commerce platforms**. As consumers become accustomed to **instant delivery, seamless payments, real-time tracking, and hassle-free returns**, they increasingly expect similar standards from direct selling companies.

Key services desired – faster delivery, easy returns and exchanges, transparent refund policies, competitive pricing, and multiple payment options—reflect this benchmarking effect. Convenience, speed, and service reliability are no longer value-adds; they are baseline requirements.



09 | DIRECT SELLING IS INCREASINGLY COMPETING WITH DIGITAL RETAIL ECOSYSTEMS



Direct selling in India is no longer operating within a closed competitive set; it is increasingly being **benchmarked against digital retail ecosystems such as e-commerce, D2C brands, and quick-commerce platforms**. Consumers today evaluate direct selling not just on product quality or relationships, but on **price competitiveness, delivery speed, convenience, and overall experience**—standards largely set by platforms like Amazon and Flipkart.



This shift is raising the bar for the industry. Expectations around **faster fulfilment, seamless online interfaces, transparent pricing, and easy returns** are becoming baseline requirements rather than differentiators. As a result, direct selling is transitioning from a **relationship-led niche model to a participant in the broader retail competitive landscape**, where digital parity is increasingly critical.



The impact of this shift is also visible on the seller side. **58% of direct sellers identify competition from e-commerce and quick-commerce platforms as a key challenge**, highlighting growing pressure on both customer acquisition and retention. In parallel, these platforms are also competing for the same pool of **flexible, income-seeking individuals**, further intensifying competition.



CHAPTER 5

EMPOWERING LIVELIHOODS & INCLUSIVE GROWTH OPPORTUNITIES

10 | DIRECT SELLING CONTINUES TO ENABLE INCOME AND ENTREPRENEURSHIP

Direct sellers are initially attracted by the **income opportunity and flexibility** the model offers; however, sustained engagement is increasingly driven by **personal growth and long-term financial stability**. This progression highlights the dual role of direct selling—as both a **commercial distribution channel** and a **viable livelihood platform** that supports ongoing economic and individual advancement.



MOST IMPORTANT REASONS FOR BECOMING A DIRECT SELLER

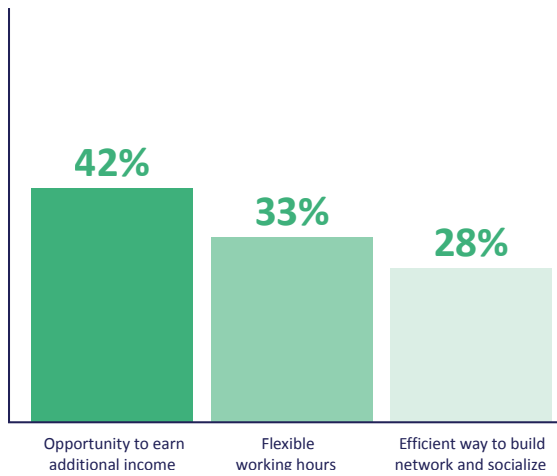


Figure 16. Most important reasons for becoming a Direct Seller

WHAT DRIVES DIRECT SELLERS TO STAY ENGAGED? MOTIVATION TO STAY IN DIRECT SELLING

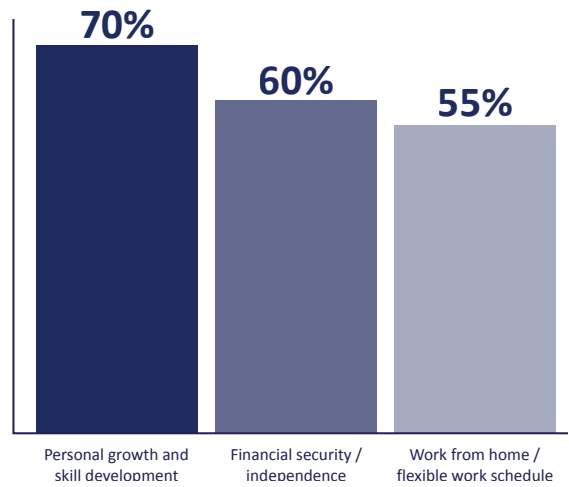



Figure 17. Factors Influencing Motivation in Direct Selling

THE SHIFT: WHY THEY JOIN vs. WHY THEY STAY

WHY THEY JOINED

42% 


Earn Additional Income

WHY THEY STAY

70% 

Personal Growth & Skill

WHY THEY JOINED

33% 

Flexible Working Hours

WHY THEY STAY

60% 

Financial security / independence

KEY INSIGHT

Direct sellers join for money, but stay for meaning – personal growth, independence and entrepreneurship outrank income as long-term motivators.



11 | DIRECT SELLING IS AN INCLUSIVE GROWTH PLATFORM

Direct selling's economic significance extends beyond its **revenue contribution**, functioning as a **commerce channel, employment model, and entrepreneurship platform** impacting **millions of lives** across India. This chapter explores two key dimensions: the **income and entrepreneurial value** created for sellers.

Women's Workforce as an Emerging Growth Lever in Direct Selling

- Women represent an important and evolving growth segment within the direct selling industry in India. Globally, the sector has a strong female presence, with 60–75% of direct sellers being women across mature markets, including markets such as the United States where participation is significantly high.
- In India, female participation has been increasing over time, although it remains below levels observed in some global markets. This indicates potential for further expansion, rather than a fully realized opportunity.
- Several structural factors support this trend. India has a large base of working-age women (+450 million), alongside gradual improvements in workforce participation (FLFPR - 41.7% in 2023-24), particularly among urban and semi-urban segments. Additionally, increasing digital access and familiarity are enabling broader participation, while the relationship-driven nature of direct selling aligns well with existing social and community networks.



Edyta Kurek,
Senior Vice President and
Head of India and Indonesia,
Oriflame

"Direct selling remains one of the most accessible pathways to entrepreneurship, particularly for women who are building something of their own, often alongside other responsibilities. At Oriflame, we see every day how a low-risk, flexible business model can unlock genuine financial independence and long-term growth. The opportunity is real, and so is the transformation it brings."



Source:

<https://wfdsa.org/wp-content/uploads/2025/12/WFDSA-STATS-Report-2024-2025-V1.pdf>

Tier 2 and Tier 3 Cities: An Emerging Area of Focus

- The FY25 Direct Sellers Survey indicates that **expansion into Tier 2 and Tier 3 cities is a growing area of interest**, with **22% of sellers identifying it as a key priority**, second only to the health and wellness category (41%). This reflects a **seller-led perspective on potential growth** areas within the market.
- The direct selling model has certain characteristics that are **well-aligned with smaller markets**. Its relatively **low infrastructure dependence** allows it to operate without the need for extensive physical retail or complex logistics networks. In addition, the model's reliance on **personal networks and community engagement** can support adoption in markets where local relationships play an important role in purchase decisions.



- They are also **enabling trends** that may support this expansion. **Improving digital access**, including increasing smartphone usage and familiarity with messaging and social media platforms, is making it easier for both sellers and consumers in these markets to participate.



Anshu Bagai,
Country Head,
Tupperware

“As India evolves, direct selling is becoming one of the most impactful platforms for entrepreneurship—unlocking income, ambition, and independence at scale. Over the years, we’ve seen that true growth is built on relationships, not just reach. The brands that will shape the future are those that preserve this human connection, while embracing the power of digital to scale it.”

Source:

<https://www.prnewswire.com/news-releases/direct-selling-remained-steady-in-2024-amid-global-economic-shifts-according-to-wfdsa-stats-report-302633355.html>

<https://data.worldbank.org/indicator/SP.POP.TOTL.FE.IN?end=2024&start=1960>



CHAPTER 6

CAPABILITIES & FUTURE GROWTH LEVERS

12 | CAPABILITY BUILDING MUST SHIFT TO DIGITAL AND CONSULTATIVE SKILLS

Capability development is shifting towards digital and leadership skills

While training currently focuses on product knowledge and fundamentals, direct sellers increasingly require skills in digital marketing, personal branding, and network leadership to scale their businesses in a more digital marketplace.



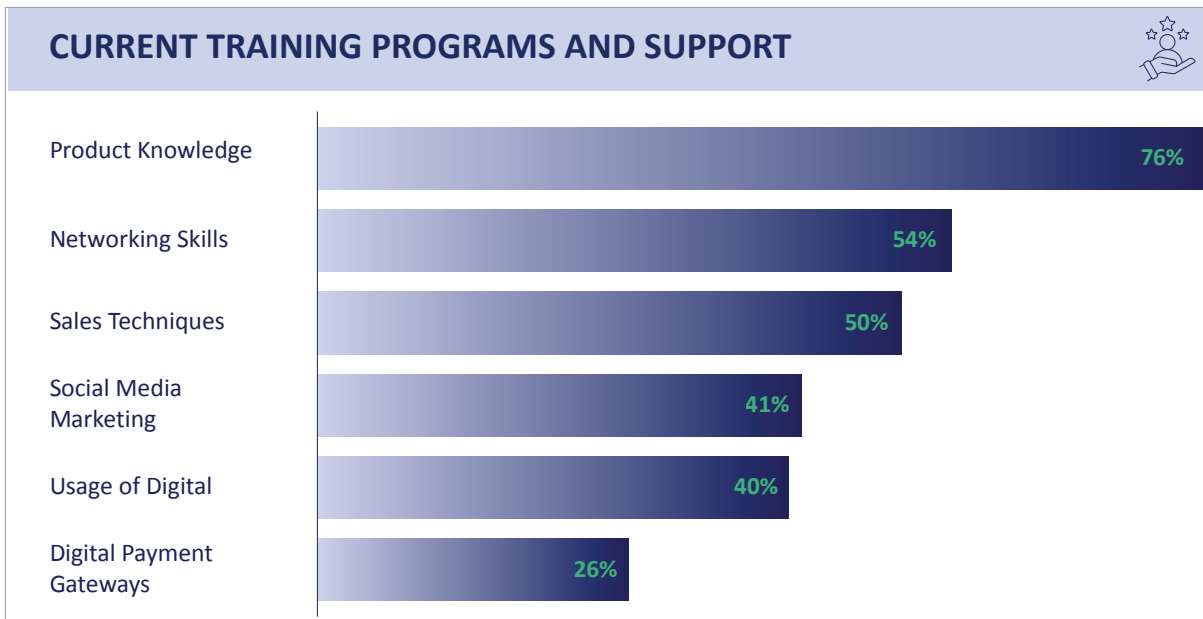


Figure 18. Trainings Provided in Last Year

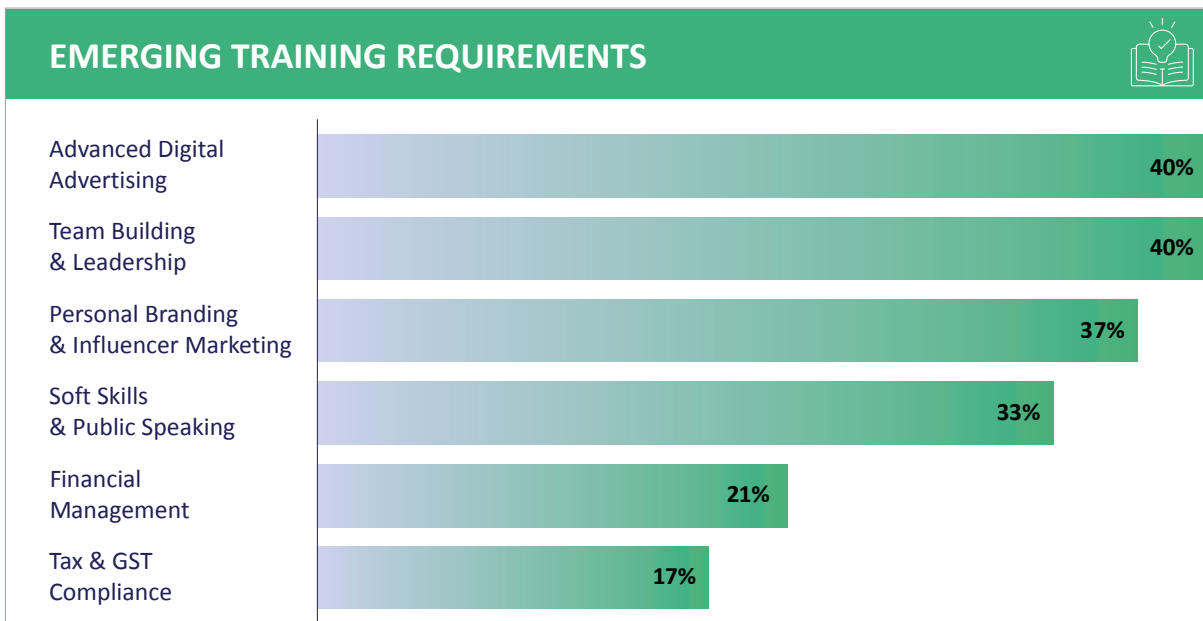


Figure 19. Emerging Training Requirements

Note: Multiple-choice question. May not add up to 100%. Percentages reflect total responses to a given choice.



Mr. Satyan Bhatia,
Managing Director
International Marketing Corporation Private Limited (IMC)

“Trust and credibility form the foundation of sustainable growth in direct selling, as they foster long-term relationships between brands and consumers. As the industry evolves, the integration of AI is further strengthening transparency, personalization, and efficiency—empowering direct sellers to build deeper, more meaningful engagement with their customers.”

SHAPING THE NEXT PHASE: AUTHENTICITY, PERSONALISATION AND AI

The next phase of growth in direct selling will be shaped by three reinforcing forces—**Authenticity, Personalisation, and AI-led enablement**. These are not future possibilities but emerging shifts already influencing how the industry competes and scales. The ability to leverage these in combination will increasingly define long-term differentiation.



Authenticity as a Core Advantage

Direct selling is built on **trust and personal accountability**, where a known seller provides credibility through direct interaction. This is reinforced by the Consumer Protection (Direct Selling) Rules, 2021 (under the CPA, 2019), which creates **transparency, accountability, and grievance redressal**.

In categories where **product trust and safety are critical**, this combination strengthens consumer confidence and remains a **core advantage that can be further strengthened and scaled**.

Personalisation Driven by Local Relevance

India's consumer landscape is characterized by significant **regional diversity** in preferences, usage patterns, and communication styles, creating a need for locally relevant engagement. The **direct selling model is well suited to address this**, as it is driven by sellers who operate within and understand their local communities.

When supported by **relevant product offerings and tailored communication**, this approach enables more **personalized interactions**. As a result, direct selling can **enhance consumer relevance, improve engagement, and drive stronger conversion outcomes**.

AI as an Enabler of Scale and Effectiveness

AI and digital tools are increasingly becoming **enablers of scale and efficiency** within the direct selling model. They can support sellers in areas such as **customer targeting, content creation, and personalized engagement**, improving productivity while maintaining the relationship-driven nature of the channel.

At the same time, AI enables organizations to adopt a more **data-driven approach**, strengthening decision-making across product strategy, seller support, and customer experience.



Team Involved in the Study



**Ms. Amarpreet
Kaur Chawla**

Deputy General Manager
at Indian Direct Selling
Association (IDSA)



Asim Makrani

Consultant at Ipsos
Strategy3



Manasi Mody

Principal at Ipsos Strategy3

Disclaimer

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ABOUT INDIAN DIRECT SELLING ASSOCIATION

Incorporated in the year 1996, the Indian Direct Selling Association (IDSA) is an autonomous, self-regulatory body for the direct selling industry in India. The Association acts as an interface between the industry and policy-making bodies of the Government, facilitating the cause of Direct Selling Industry in India. IDSA is the only association from India to have affiliation with the World Federation of Direct Selling Associations (WFDSA), the prestigious global body representing over 60 national direct selling associations currently active in nearly 170 countries around the world.

For more than two decades, IDSA has been engaged in advocating towards fostering a conducive environment for the growth and development of the direct selling industry in India and a comprehensive regulation mechanism for the industry. IDSA charts change through advocacy, research, dialogues, engagement with member companies and campaigns dedicated to the promotion and growth of the industry in India.



INDIAN DIRECT SELLING ASSOCIATION

710, New Delhi House, 27 Barakhamba Road, Connaught Place, New Delhi- 110001