

Global Brand Licensing Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Brand Licensing market size is expected to reach \$ 536668 million by 2032, rising at a market growth of 4.6% CAGR during the forecast period (2026-2032).

Brand licensing is a commercial arrangement in which the owner of a brand or other intellectual property (the licensor) grants a company or individual (the licensee) the right to use the brand name, trademarks, patents, copyrights, or related intangible assets to manufacture, sell, and/or promote products or services under defined conditions—typically limited by product scope, territory, and term—in exchange for consideration such as an upfront fee and ongoing royalties tied to sales; the licensing agreement sets out key provisions covering the authorized scope, fee structure, quality control and approval requirements, marketing and brand-use guidelines, and contract term with renewal or termination mechanisms, enabling the licensor to expand reach and monetize the IP without directly operating the business, while helping the licensee enter the market faster, strengthen competitiveness, and reduce branding and customer acquisition costs. This paper measures the retail sales value of licensed merchandise.

The Brand licensing retail market monetizes intangible assets—such as trademarks, entertainment characters, copyrighted content, and celebrity names and likenesses—by converting IP equity into scalable consumer products and retail sell-through under contractual terms. Licensors grant defined usage rights to licensees within an agreed scope (term, territory, and product categories), while licensees develop, manufacture, and distribute licensed products and pay fees and royalties. As a result, the industry is jointly driven by content/brand influence and retail execution, requiring sustained awareness on the demand side and fast product refresh and shelf access on the supply side.

By licensing property type, Entertainment remains the largest contributor to licensed retail, supported by frequent content releases across film, animation, gaming, and streaming, which fuels newness, franchise longevity, and repeat purchasing. Corporate Trademarks/Brands also represent a sizable portion of the market, leveraging brand recognition and quality signaling to drive conversion across mass categories and retailer-exclusive collaborations. Fashion and Sports properties are more cycle- and event-driven, with trend-led design partnerships, tournament calendars, and fan economies generating periodic spikes and structural growth.

On the product side, Apparel, Toys, and Accessories typically lead licensed retail sales, reflecting licensing's strength in wearable brand signaling, emotion-led play and collectability, and lightweight gifting. Home-related categories such as Home Decoration have also expanded meaningfully, helped by the rise of large direct-to-retail licensing programs that secure stronger shelf placement and conversion, and the category is well positioned to grow further as retail-led collaborations and at-home consumption scenarios continue to evolve.

Regionally, North America remains the dominant market, followed by Europe and Asia-Pacific, forming a clear split between mature markets that deliver stable, high-value revenues and emerging markets that offer higher growth. Mature regions such as North America, Europe, and Japan are increasingly shifting toward digital and experiential licensing, while fast-growing regions such as China, Southeast Asia, India, and Latin America are scaling rapidly through e-commerce penetration and mass adoption of branded consumer products. As growth opportunities increasingly emerge outside a more saturated U.S. market, non-traditional retail channels and online commerce are becoming core growth engines. With physical shelf space contracting and online shelf space expanding quickly, direct-to-retail license agreements continue to gain traction—helping retailers secure differentiated assortments while enabling new brands and IPs to establish a foothold in the retail market.

This report studies the global Brand Licensing demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Brand Licensing, and provides market size (US\$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Brand Licensing that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Brand Licensing total market, 2021-2032, (USD Million)

Global Brand Licensing total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Brand Licensing total market, key domestic companies, and share, (USD Million)

Global Brand Licensing revenue by player, revenue and market share 2021-2026, (USD Million)

Global Brand Licensing total market by Type, CAGR, 2021-2032, (USD Million)

Global Brand Licensing total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Brand Licensing market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include The Walt Disney Company, Authentic Brands Group, People Inc., NBCUniversal, Hasbro, Warner Bros. Discovery, The Pokemon Company, Bluestar Alliance, Mattel, Sanrio, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Brand Licensing market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Brand Licensing Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Brand Licensing Market, Segmentation by Type:

Apparels

Toys

Accessories

Home Decoration

Software/Video Games

Food and Beverage

Others

Global Brand Licensing Market, Segmentation by Application:

Entertainment

Corporate Trademarks/Brand

Fashion

Sports

Others

Companies Profiled:

The Walt Disney Company

Authentic Brands Group

People Inc.

NBCUniversal

Hasbro

Warner Bros. Discovery

The Pokemon Company

Bluestar Alliance

Mattel

Sanrio

WHP Global

Paramount Consumer Products

Toei Animation

The Electrolux Group

Procter & Gamble

Whirlpool Corporation

BBC Studios

Wildbrain

Serta Simmons Bedding

Stanley Black & Decker

Caterpillar

Bandai Namco Group

U.S. Polo Assn.

NFL Players Inc.

Rainbow

Dr. Seuss Enterprises

The Hershey Company

Nissan Motor Corporation

GoTo Foods

BMW Group

Jazwares

Sunkist Growers

SEGA

PGA Tour

Sesame Workshop

Church and Dwight

Alpha Group

Shanghai Skynet Brand Management

Key Questions Answered

1. How big is the global Brand Licensing market?
2. What is the demand of the global Brand Licensing market?
3. What is the year over year growth of the global Brand Licensing market?
4. What is the total value of the global Brand Licensing market?
5. Who are the Major Players in the global Brand Licensing market?
6. What are the growth factors driving the market demand?

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