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Global Film and Television Licensed Merchandise Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Film and Television Licensed Merchandise market size is expected to reach $ 7562 million by 2032, rising at a market growth of 7.0% CAGR during the forecast period (2026-2032).

Film and television licensed merchandise refers to derivative products that utilize character images, logos, scene elements, or story IPs from movies, TV series, or streaming media content, legally authorized by the copyright holders of such works, and are applied to physical or digital goods. These products encompass categories such as toys, clothing, stationery, home furnishings, collectibles, and digital peripherals. These products are centered on the content IP, with the scope, duration, and revenue-sharing model clearly defined through brand licensing agreements. The licensed manufacturers or retailers are responsible for designing, producing, and selling these products. Film and television licensed merchandise typically leverages the fan base and emotional connection of popular film and television IPs to achieve market conversion, representing an important extension of the content industry's commercialization. Its core characteristics lie in IP-driven consumption, a lifecycle highly correlated with the work's popularity, and enhanced market appeal through cross-industry collaborations and limited-edition releases.

The market for Film and Television Licensed Merchandise is currently at a pivotal stage, evolving from traditional character-based merchandise toward the commercialization of broader IP ecosystems. As the global industries of film, animation, gaming, and streaming content continue to expand, the commercial value of hit IPs is extending beyond box office receipts and subscription fees into licensed product categories such as toys, apparel, home goods, collectibles, cultural and creative products, and digital goods. Rising consumer demand for IP products that foster emotional connections and

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cultural resonance has established licensed merchandise as a crucial secondary revenue stream within the film and television value chain. Properties such as superhero franchises, classic animations, sci-fi series, hit TV shows, and streaming originals are continuously extending their brand influence and commercial lifecycles through long-term management and cross-category licensing.

In terms of supply and demand, the market is characterized by a model driven by content IPs and empowered by brand licensing, featuring large-scale manufacturing and diversified sales channels. Upstream players—including film and TV production companies, animation studios, streaming platforms, and copyright management agencies—supply the IP resources, transforming character imagery, narrative elements, and brand assets into design resources through licensing partnerships. Midstream participants—such as manufacturers of toys, apparel, home goods, and collectibles, as well as cultural and creative enterprises—handle product development, manufacturing, and marketing. Downstream operations encompass various consumer touchpoints, including e-commerce platforms, retail outlets, themed stores, cinema merchandise channels, and theme parks. As consumer purchasing habits shift toward online and social-driven experiences, e-commerce, "blind box" collecting, limited-edition releases, and the "fan economy" have emerged as key drivers of market growth.

Future development in this sector will increasingly prioritize long-term IP management and product innovation. On one hand, technologies such as AI-driven design, digital supply chains, and flexible manufacturing will enhance development efficiency, enabling companies to respond rapidly to trending content and shifting consumer preferences. On the other hand, eco-friendly materials, personalized customization, high-end collectibles, and cross-brand collaborations will represent new avenues for growth. The Asian market—particularly China, Japan, and South Korea—is poised to become a major growth region, driven by the rise of local IPs, the expansion of anime and manga culture consumption, and the growing receptiveness of young consumers to trend-driven culture. Meanwhile, leading international IP holders will continue to strengthen their global licensing networks, maximizing the utility of their IP assets through integrated strategies spanning films, TV series, games, themed entertainment, and consumer products. Industry competition is shifting from a simple race based on the volume of licenses to a comprehensive contest involving "high-quality IP resources, product innovation capabilities, and channel operation expertise." Enterprises possessing robust IP portfolios, mature licensing management systems, and global commercialization capabilities hold a distinct advantage, whereas small and medium-sized enterprises (SMEs) tend to enter the market by targeting niche categories, specific regional markets, or distinctive designs. Future market opportunities will center on film and

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television IPs with sustained content output, highly interactive fan communities, cross-industry collaborations, and innovative licensed products integrated with digital entertainment ecosystems.

Report Scope

This report studies the global Film and Television Licensed Merchandise demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Film and Television Licensed Merchandise, 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 Film and Television Licensed Merchandise that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Film and Television Licensed Merchandise total market, 2021-2032, (USD Million)

Global Film and Television Licensed Merchandise total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Film and Television Licensed Merchandise total market, key domestic companies, and share, (USD Million)

Global Film and Television Licensed Merchandise revenue by player, revenue and market share 2021-2026, (USD Million)

Global Film and Television Licensed Merchandise total market by Type, CAGR, 2021-2032, (USD Million)

Global Film and Television Licensed Merchandise total market by Application, CAGR, 2021-2032, (USD Million)

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This report profiles major players in the global Film and Television Licensed Merchandise 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 Nemesis Now, Zinc Group, Mattel, Merch Showroom, Bandai, Hasbro, Funko, LEGO, Spin Master, POP MART, 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 Film and Television Licensed Merchandise 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 Film and Television Licensed Merchandise Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

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Market Segmentation

Global Film and Television Licensed Merchandise Market, Segmentation by Type:

Clothing and Accessories

Toys and Games

Fashion Accessories

Others

Global Film and Television Licensed Merchandise Market, Segmentation by Licensing Method:

Product Licensing

Outer Packaging Licensing

Gift/Gift Licensing

Others

Global Film and Television Licensed Merchandise Market, Segmentation by Technical Form:

Physical Goods

Digital Goods

Global Film and Television Licensed Merchandise Market, Segmentation by Application:

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Restaurant Collaborations

Commercial Retail

Others

Companies Profiled:

Nemesis Now

Zinc Group

Mattel

Merch Showroom

Bandai

Hasbro

Funko

LEGO

Spin Master

POP MART

Key Questions Answered

1. How big is the global Film and Television Licensed Merchandise market?
2. What is the demand of the global Film and Television Licensed Merchandise market?
3. What is the year over year growth of the global Film and Television Licensed Merchandise market?
4. What is the total value of the global Film and Television Licensed Merchandise market?

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5. Who are the Major Players in the global Film and Television Licensed Merchandise market?
6. What are the growth factors driving the market demand?

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