

Global Game IP Licensing Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Game IP Licensing market size is expected to reach \$ 65704 million by 2032, rising at a market growth of 8.6% CAGR during the forecast period (2026-2032).

Game IP Licensing refers to the process by which intellectual property (IP) owners of video games—such as characters, worlds, storylines, and branding elements—grant legal rights to third parties to use these assets in exchange for fees or royalties, enabling commercialization across merchandise, media adaptations, collaborations, and derivative content while maintaining ownership and control over the original intellectual property.

The game IP licensing industry chain begins upstream with game developers, studios, and publishers who create and own intellectual property assets including characters and storylines, followed by midstream licensing agencies, legal firms, and brand managers that structure agreements, manage rights, and facilitate partnerships, while downstream consists of manufacturers, media companies, digital platforms, and retailers that utilize licensed game IP in merchandise, adaptations, collaborations, and promotional activities to generate revenue, enhance brand visibility, and expand audience engagement across global entertainment, gaming, and consumer markets through diversified commercialization channels.

Globally, numerous projects under construction and planning involve expansion of game IP into cross-media franchises including film and television adaptations, development of spin-off mobile and online games, collaborations with global consumer brands for merchandise lines, creation of themed entertainment venues and esports events, and investment in metaverse platforms and virtual worlds where game IP can be monetized through digital assets and experiences, with companies focusing on

building long-term ecosystems around popular franchises, enhancing fan engagement, and diversifying revenue streams through strategic licensing partnerships and global market expansion initiatives.

2025 Global Market Market Average Gross Profit Margin: 58%.

Market development summary: The game IP licensing market has shown a trend of sustained growth in recent years, mainly benefiting from the global expansion of the game industry, the rise of cross-border cooperation and the prosperity of the derivatives market. Game IP is not only limited to the game itself, but has penetrated into multiple fields such as film and television, animation, toys, clothing, novels, theme parks, etc., becoming an important part of the global entertainment industry.

Regional analysis: The game IP licensing market shows a global development trend, but the main growth momentum comes from North America, Asia and Europe. The United States is the core of the global game IP licensing market and has many top game companies. Streaming media platforms such as Disney and Netflix are actively deploying game adaptation film and television projects. American consumers have a high acceptance of game IP peripheral products, especially the markets for trendy toys, clothing, and collectibles are active. Japan is a major IP licensing country in the world and has many well-known IPs. The Chinese market is growing rapidly, and giants such as Tencent and NetEase have expanded the game ecosystem through IP licensing, such as 'Honor of Kings' and McDonald's, 'Onmyoji' and luxury brands. South Korea's game IP licensing business revolves around 'League of Legends' and 'Dungeon and Warriors', covering e-sports, clothing, peripheral products, etc. The European market is dominated by e-sports and PC games. Theme parks and physical entertainment projects are developing rapidly, such as the combination of the Harry Potter theme park in the UK and game IP.

Market competition analysis: At present, the game IP licensing market is highly competitive, mainly divided into different types of competitors such as large game companies, IP licensing platforms, derivative companies, and film and television companies.

Market development opportunities: As the global game market size exceeds US\$200 billion, the commercial value of popular game IPs continues to rise. In recent years, successful cases such as 'The Last of Us' and 'Super Mario Movie' have driven more game IPs to enter the film and television industry, driving market growth. Clothing, toys, food and other industries cooperate with game IPs, such as Nike and 'Fortnite' joint

products, Lego and 'Minecraft' cooperative products. The rise of e-sports events and game live broadcast platforms has made IP licensing involve more areas, such as the sponsorship of the 'League of Legends' global finals and the market for licensed derivatives. In 2024, the release of several popular game adaptations of film and television works is expected to further promote the growth of the IP licensing market. The application of game IP in virtual reality (VR), augmented reality (AR) and other fields will create more licensing opportunities.

Market risks: The licensing of game IP involves complex legal issues, and copyright disputes may affect business operations. Excessive licensing may lead to market saturation and IP depreciation. The game market changes rapidly, and the life cycle of some IPs is short, making it difficult to make profits in the long term. Global economic fluctuations may reduce consumer demand for game IP-related products.

Latest developments: Microsoft acquires Activision Blizzard (US\$68.7 billion) - further expands the game IP library and improves the competitiveness of the IP licensing market. Sony invests in game IP adaptation film and television - plans to launch more game IP adaptation film and television works in 2024, such as 'Ghost of Tsushima'. Tencent deploys overseas IP licensing - expands IP licensing business by investing in game companies in Japan, Europe and the United States. Netflix continues to develop game IP - launch more game adaptation film and television works, and develop interactive game content.

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

This report is a detailed and comprehensive analysis of the world market for Game IP 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 Game IP Licensing that contribute to its increasing demand across many markets.

Highlights and key features of the study

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

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

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

Global Game IP Licensing revenue by player, revenue and market share 2021-2026,

(USD Million)

Global Game IP Licensing total market by Licensed Game Assets, CAGR, 2021-2032,

(USD Million)

Global Game IP Licensing total market by Merchandise Type, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Game IP 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 Bandai Namco Entertainment, Nintendo, Sony Interactive Entertainment, Gearbox Software, Microsoft Game, The Pok?mon Company, Take-Two Interactive, SEGA, Capcom, Square Enix, 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 Game IP Licensing market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, by Licensed Game Assets, and by Merchandise Type. 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 Game IP Licensing Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Game IP Licensing Market, Segmentation by Licensed Game Assets:

Character Licensing

Music Licensing

Lore Licensing

Others

Global Game IP Licensing Market, Segmentation by Licensing Type:

Exclusive Licensing

Non-Exclusive Licensing

Global Game IP Licensing Market, Segmentation by Contract Structure:

Royalty-Based Licensing

Fixed Fee Licensing

Revenue Sharing Licensing

Hybrid Licensing Model

Global Game IP Licensing Market, Segmentation by Merchandise Type:

Toys

Apparel

Entertainment & Media

Home Products

Others

Companies Profiled:

Bandai Namco Entertainment

Nintendo

Sony Interactive Entertainment

Gearbox Software

Microsoft Game

The Pok?mon Company

Take-Two Interactive

SEGA

Capcom

Square Enix

Ubisoft

Embracer Group

The Tetris Company

Bushiroad Inc

Key Questions Answered

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

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