

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

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Abstracts

The global Licensed Merchandise 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).

Licensed merchandise refers to consumer products that incorporate or are associated with licensed properties—such as brand names, trademarks, entertainment characters, copyrighted content, and celebrity names and likenesses—under a contractual arrangement where the rights owner (the licensor) grants defined usage rights to a company or individual (the licensee) within an agreed scope (term, territory, and product categories). The licensee develops, manufactures, markets, and sells the products and typically pays licensing fees and ongoing royalties based on sales. This paper measures the retail sales value of licensed merchandise.

The licensed merchandise retail market monetizes intangible assets—such as trademarks, characters, copyrighted content, and celebrity names and likenesses—by converting IP equity into scalable product sales and channel penetration through contract-based licensing. Within agreed terms, territories, and product scopes, the licensor grants usage rights to the licensee, which then develops, manufactures, and sells licensed merchandise while paying licensing fees and royalties under the contract. As a result, the industry is jointly driven by content and retail: it relies on sustained content/brand exposure and heat on the one hand, and on retail-side product refresh speed, shelf coverage, and supply-chain responsiveness on the other.

By licensing property type, entertainment IP remains the largest source of licensed retail and holds the most core share, benefiting from high-frequency supply and cross-media distribution across film/animation, gaming, and streaming that support continuous newness and long-tail repurchase. Corporate trademarks/brand licensing is also

sizable, relying more on brand awareness and quality signaling to drive steady conversion in mass consumer categories, co-brand collaborations, and channel-exclusive programs. Fashion and sports licensing shows stronger trend cycles and event-driven dynamics, generating periodic volume spikes and structural growth around design collaborations, tournament calendars, and fan economies.

From a product mix perspective, apparel, toys, and accessories are typically the three leading categories by licensed retail sales share. They map respectively to high-frequency wearables, emotion- and collectability-driven consumption, and lightweight gifting, and they naturally enable strong “symbolic visibility” and rapid iteration. Home-related categories such as home decoration have also expanded quickly in recent years. The rise of retailer-led direct-to-retail licensing programs has improved shelf stability and conversion for this category, leaving room for further share gains.

Regionally, North America has long been the dominant market, with Europe and Asia-Pacific forming the second tier, creating 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 have more established licensing ecosystems and are evolving toward digital and experiential licensing. Emerging regions including China, Southeast Asia, India, and Latin America are scaling rapidly, driven by e-commerce penetration, branded consumption, and mass-category expansion, and have become key incremental growth engines. As global consumption rebounds and cross-border content distribution accelerates, more opportunity is increasingly coming from outside the more saturated U.S. market. Online commerce and non-traditional retail channels are becoming central growth drivers, and direct-to-retail licensing continues to gain momentum as physical shelf space contracts and online shelf space expands—helping retailers secure differentiated assortments while enabling new brands and new IP to establish a faster foothold in mainstream retail.

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

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

Highlights and key features of the study

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

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

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

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

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

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

This report profiles major players in the global 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 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 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 Licensed Merchandise Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Licensed Merchandise Market, Segmentation by Type:

Apparels

Toys

Accessories

Home Decoration

Software/Video Games

Food and Beverage

Others

Global Licensed Merchandise 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 Licensed Merchandise market?
2. What is the demand of the global Licensed Merchandise market?
3. What is the year over year growth of the global Licensed Merchandise market?
4. What is the total value of the global Licensed Merchandise market?
5. Who are the Major Players in the global Licensed Merchandise market?
6. What are the growth factors driving the market demand?

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