

U.S. Licensed Merchandise Market Size, Share & Trends Analysis Report by Product (Apparel, Toys, Accessories, Home Decor, Entertainment), By Distribution Channel (E-Commerce Platforms, Brand Websites, Supermarkets & Hypermarkets, Specialty Stores, Brand Outlets, Department Stores), And Segment Forecasts, 2026 - 2033

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Abstracts

The U.S. licensed merchandise market size was estimated at USD 73.99 billion in 2025 and is projected to reach USD 129.96 billion in 2033, growing at a CAGR of 7.4% from 2026 to 2033. The market is characterized by its strong association with globally recognized intellectual property (IP), particularly in sports, entertainment, and digital media.

High consumer engagement with major leagues such as the National Football League, National Basketball Association, and Major League Baseball, along with leading entertainment companies like The Walt Disney Company and Warner Bros. Discovery, continues to drive consistent demand for licensed products across apparel, toys, accessories, and collectibles. The growing commercialization of these IPs, supported by strategic licensing partnerships, is further enhancing product penetration across both mass-market and premium segments.

In addition, large-scale sports tournaments and entertainment releases act as key demand accelerators, generating significant short-term spikes in merchandise sales across both offline and online channels. Peak consumption periods, driven by major events and blockbuster content launches, often result in double-digit growth across high-demand categories such as apparel, toys, and accessories. This trend underscores the

market's reliance on franchise-led demand and seasonal consumption patterns. Moreover, the rapid expansion of direct-to-consumer (DTC) platforms and increasing brand collaborations are improving product accessibility, enabling personalization, and broadening consumer reach, thereby supporting the long-term growth trajectory of the U.S. licensed merchandise market.

The U.S. licensed merchandise industry is projected to grow steadily from 2026 to 2033, supported by strong consumer demand, high brand awareness, and a well-established ecosystem of entertainment, sports, and media intellectual properties. As one of the largest markets globally, the U.S. benefits from high consumer spending capacity and deep-rooted fan engagement, which continue to drive consistent demand for licensed products across multiple categories. The increasing influence of streaming platforms, blockbuster film releases, and sports leagues has further strengthened the market by expanding the reach and relevance of licensed content.

By product, the apparel licensed merchandise market continues to dominate the market, accounting for the largest revenue share due to its broad consumer appeal, high purchase frequency, and strong alignment with fashion trends and sports affiliations. The toys segment holds the second-largest share, driven by sustained demand for character-based merchandise, franchise tie-ins, and a growing collector base among both children and adults. Accessories are emerging as a key growth segment, supported by rising consumer preference for affordable, everyday licensed products such as bags, mobile accessories, and personal items. Meanwhile, the home decor and entertainment segments are experiencing steady growth, reflecting increasing consumer interest in incorporating branded and themed elements into living spaces and lifestyle experiences. The 'others' category, although smaller in size, continues to expand, indicating diversification into niche and innovative product offerings.

The market is expected to be shaped by several key trends, including the continued expansion of e-commerce and direct-to-consumer channels, which are enhancing product accessibility and consumer reach. Strategic collaborations between brands and entertainment franchises are anticipated to remain a critical growth driver, enabling differentiated product offerings and strengthening consumer engagement. Additionally, there is a noticeable shift toward lifestyle-oriented, experiential consumption, in which licensed merchandise is increasingly seen as an extension of personal identity. The growing influence of adult consumers and collectors, along with the integration of merchandise with digital platforms and gaming ecosystems, is further expected to drive market expansion. Sustainability considerations and the increasing focus on product authenticity and anti-counterfeiting measures are also likely to play a significant role in

shaping future market dynamics. Overall, the U.S. licensed merchandise market is expected to maintain a positive growth trajectory, with apparel and toys continuing to serve as primary revenue contributors. At the same time, other segments gain momentum through innovation and evolving consumer preferences.

The U.S. licensed sports merchandise market is one of the most dynamic and commercially significant segments of the broader licensing ecosystem, driven by strong fan loyalty, recurring sporting events, and a deep-rooted sports culture. The licensed sports merchandise market benefits from the massive popularity of leagues such as the National Football League, National Basketball Association, and Major League Baseball, where demand for jerseys, caps, and fan apparel surges during key events like the Super Bowl and the NBA Finals. The licensed sports merchandise market is further supported by strategic partnerships and vertically integrated players such as Fanatics, which enable rapid product launches aligned with real-time game outcomes and player performances. In addition, the licensed sports merchandise market is increasingly influenced by digital commerce, limited-edition drops, and athlete-driven branding, with star players like LeBron James significantly impacting merchandise sales and consumer engagement.

The continued expansion of women's sports, collegiate athletics, and international fan bases is also broadening the addressable market, positioning the licensed sports merchandise market for sustained growth and innovation in the coming years.

U.S. Licensed Merchandise Market Report Segmentation

This report forecasts revenue growth at the country level and provides an analysis of the latest trends and opportunities in each of the sub-segments from 2021 to 2033. In this study, Grand View Research has segmented the U.S. licensed merchandise market report based on product, and distribution channel:

Product Type Outlook (Revenue, USD Million, 2021 - 2033)

Apparel

Toys

Accessories

Home Decor

Entertainment

Others

Distribution Channel Outlook (Revenue, USD Million, 2021 - 2033)

E-commerce Platforms

Brand Websites

Supermarkets & Hypermarkets

Specialty Stores

Brand Outlets

Department Stores

Others

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Contents

CHAPTER 1. METHODOLOGY AND SCOPE

- 1.1. Market Segmentation & Scope
- 1.2. Market Definition
- 1.3. Information Procurement
 - 1.3.1. Purchased Database
 - 1.3.2. GVR's Internal Database
 - 1.3.3. Secondary Sources & Third-Party Perspectives
 - 1.3.4. Primary Research
- 1.4. Information Analysis
 - 1.4.1. Data Analysis Models
- 1.5. Market Formulation & Data Visualization
- 1.6. Data Validation & Publishing

CHAPTER 2. EXECUTIVE SUMMARY

- 2.1. Market Outlook
- 2.2. Segmental Outlook

CHAPTER 3. U.S. LICENSED MERCHANDISE MARKET VARIABLES, TRENDS & SCOPE

- 3.1. Market Lineage Outlook
- 3.2. Industry Value Chain Analysis
 - 3.2.1. Sales Channel Analysis and Trends
- 3.3. Market Dynamics
 - 3.3.1. Driver Impact Analysis
 - 3.3.2. Restraint Impact Analysis
 - 3.3.3. Industry Challenges
 - 3.3.4. Industry opportunities
- 3.4. Industry Analysis Tools
 - 3.4.1. Industry Analysis - Porter's Five Forces
 - 3.4.1.1. Supplier Power
 - 3.4.1.2. Buyer Power
 - 3.4.1.3. Substitution Threat
 - 3.4.1.4. Threat from New Entrant
 - 3.4.1.5. Competitive Rivalry

3.5. Market Entry Strategies

CHAPTER 4. CONSUMER BEHAVIOR ANALYSIS

- 4.1. Demographic Analysis
- 4.2. Consumer Trends and Preferences
- 4.3. Factors Affecting Buying Decision
- 4.4. Consumer Event Type Adoption
- 4.5. Observations & Recommendations

CHAPTER 5. U.S. LICENSED MERCHANDISE MARKET: BY PRODUCT ESTIMATES & TREND ANALYSIS

- 5.1. U.S. Licensed Merchandise Market, By Product: Key Takeaways
- 5.2. Product Movement Analysis & Market Share, 2025 & 2033
- 5.3. Market Estimates & Forecasts, By Product, 2021 - 2033 (USD Million)
 - 5.3.1. Apparel Licensed merchandise
 - 5.3.1.1. Market estimates and forecast, 2021 - 2033 (USD Million)
 - 5.3.2. Toys Licensed merchandise
 - 5.3.2.1. Market estimates and forecast, 2021 - 2033 (USD Million)
 - 5.3.3. Accessories Licensed merchandise
 - 5.3.3.1. Market estimates and forecast, 2021 - 2033 (USD Million)
 - 5.3.4. Home Decor Licensed Merchandise
 - 5.3.4.1. Market estimates and forecast, 2021 - 2033 (USD Million)
 - 5.3.5. Entertainment Licensed Merchandise
 - 5.3.5.1. Market estimates and forecast, 2021 - 2033 (USD Million)
 - 5.3.6. Others
 - 5.3.6.1. Market estimates and forecast, 2021 - 2033 (USD Million)

CHAPTER 6. LICENSED MERCHANDISE MARKET: BY DISTRIBUTION CHANNEL ESTIMATES & TREND ANALYSIS

- 6.1. U.S. Licensed Merchandise Market, by Distribution Channel: Key Takeaways
- 6.2. Distribution Channel Movement Analysis & Market Share, 2025 & 2033
- 6.3. Market Estimates & Forecasts, By Distribution Channel, 2021 - 2033 (USD Million)
 - 6.3.1. E-commerce Platforms
 - 6.3.1.1. Market estimates and forecast, 2021 - 2033 (USD Million)
 - 6.3.2. Brand Websites
 - 6.3.2.1. Market estimates and forecast, 2021 - 2033 (USD Million)

6.3.3. Supermarkets & Hypermarkets

6.3.3.1. Market estimates and forecast, 2021 - 2033 (USD Million)

6.3.4. Specialty Stores

6.3.4.1. Market estimates and forecast, 2021 - 2033 (USD Million)

6.3.5. Brand Outlets

6.3.5.1. Market estimates and forecast, 2021 - 2033 (USD Million)

6.3.6. Department Stores

6.3.6.1. Market estimates and forecast, 2021 - 2033 (USD Million)

6.3.7. Others

6.3.7.1. Market estimates and forecast, 2021 - 2033 (USD Million)

CHAPTER 7. U.S. LICENSED MERCHANDISE MARKET: COMPETITIVE ANALYSIS

7.1. Recent developments & impact analysis by key market participants

7.2. Company Categorization

7.3. Participant's Overview

7.4. Financial Performance

7.5. Product Portfolios

7.6. Company Market Share Analysis, 2025 (%)

7.7. Company Heat Map Analysis, 2025

7.8. Strategy Mapping

7.9. Company Profiles

7.9.1. The Walt Disney Company

7.9.1.1. Company Overview

7.9.1.2. Financial Performance

7.9.1.3. Product Portfolios

7.9.1.4. Strategic Initiatives

7.9.2. Hasbro, Inc

7.9.2.1. Company Overview

7.9.2.2. Financial Performance

7.9.2.3. Product Portfolios

7.9.2.4. Strategic Initiatives

7.9.3. The Pokemon Company International

7.9.3.1. Company Overview

7.9.3.2. Financial Performance

7.9.3.3. Product Portfolios

7.9.3.4. Strategic Initiatives

7.9.4. Fanatics

7.9.4.1. Company Overview

- 7.9.4.2. Financial Performance
- 7.9.4.3. Product Portfolios
- 7.9.4.4. Strategic Initiatives
- 7.9.5. NBCUniversal
 - 7.9.5.1. Company Overview
 - 7.9.5.2. Financial Performance
 - 7.9.5.3. Product Portfolios
 - 7.9.5.4. Strategic Initiatives
- 7.9.6. Warner Bros Discovery
 - 7.9.6.1. Company Overview
 - 7.9.6.2. Financial Performance
 - 7.9.6.3. Product Portfolios
 - 7.9.6.4. Strategic Initiatives
- 7.9.7. Mad Engine
 - 7.9.7.1. Company Overview
 - 7.9.7.2. Financial Performance
 - 7.9.7.3. Product Portfolios
 - 7.9.7.4. Strategic Initiatives
- 7.9.8. Funko
 - 7.9.8.1. Company Overview
 - 7.9.8.2. Financial Performance
 - 7.9.8.3. Product Portfolios
 - 7.9.8.4. Strategic Initiatives
- 7.9.9. Jazwares
 - 7.9.9.1. Company Overview
 - 7.9.9.2. Financial Performance
 - 7.9.9.3. Product Portfolios
 - 7.9.9.4. Strategic Initiatives
- 7.9.10. The Souled Store
 - 7.9.10.1. Company Overview
 - 7.9.10.2. Financial Performance
 - 7.9.10.3. Product Portfolios
 - 7.9.10.4. Strategic Initiatives
- 7.9.11. Sanrio Co. Ltd.
 - 7.9.11.1. Company Overview
 - 7.9.11.2. Financial Performance
 - 7.9.11.3. Product Portfolios
 - 7.9.11.4. Strategic Initiatives

List Of Tables

LIST OF TABLES

Table 1 U.S. licensed merchandise market - Key market driver analysis

Table 2 U.S. licensed merchandise market - Key market restraint analysis

Table 3 U.S. licensed merchandise market estimates & forecast, by product type (USD Million)

Table 4 U.S. licensed merchandise market estimates & forecast, by distribution channel (USD Million)

Table 5 Recent developments & impact analysis, by key market participants

Table 6 Company market share, 2025

Table 7 Company heat map analysis

Table 8 Companies are undergoing key strategies

List Of Figures

LIST OF FIGURES

- Fig. 1 US-licensed merchandise market segmentation
- Fig. 2 Information procurement
- Fig. 3 Primary research pattern
- Fig. 4 Primary research approaches
- Fig. 5 Primary research process
- Fig. 6 Market snapshot
- Fig. 7 Segment snapshot
- Fig. 8 Competitive landscape Snapshot
- Fig. 9 Global parent industry and US licensed merchandise size (USD Million)
- Fig. 10 US licensed merchandise market size, 2021 to 2033 (USD Million)
- Fig. 11 US licensed merchandise market: Penetration & growth prospect mapping
- Fig. 12 US licensed merchandise market: Value chain analysis
- Fig. 13 US licensed merchandise market: Booking mode trends & analysis
- Fig. 14 US licensed merchandise market: Dynamics
- Fig. 15 US licensed merchandise market: Porter's five forces analysis
- Fig. 16 Factors influencing buying decisions for licensed merchandise
- Fig. 17 US licensed merchandise market: Product Type movement analysis, 2025 & 2033 (%)
- Fig. 18 US apparel market estimates & forecasts, 2021 - 2033 (USD Million)
- Fig. 19 US toys market estimates & forecasts, 2021 - 2033 (USD Million)
- Fig. 20 US accessories market estimates & forecasts, 2021 - 2033 (USD Million)
- Fig. 21 US Home Decor market estimates & forecasts, 2021 - 2033 (USD Million)
- Fig. 22 US Entertainment market estimates & forecasts, 2021 - 2033 (USD Million)
- Fig. 23 US others market estimates & forecasts, 2021 - 2033 (USD Million)
- Fig. 24 US licensed merchandise market estimates & forecasts, by distribution channel (USD Million)
- Fig. 25 US licensed merchandise market estimates & forecasts, through e-commerce platforms, 2021 - 2033 (USD Million)
- Fig. 26 US licensed merchandise market estimates & forecasts, through brand websites, 2021 - 2033 (USD Million)
- Fig. 27 US licensed merchandise market estimates & forecasts, through supermarkets & hypermarkets, 2021 - 2033 (USD Million)
- Fig. 28 US licensed merchandise market estimates & forecasts, through specialty stores, 2021 - 2033 (USD Million)
- Fig. 29 US licensed merchandise market estimates & forecasts, through brand outlets,

2021 - 2033 (USD Million)

Fig. 30 US licensed merchandise market estimates & forecasts, through department stores, 2021 - 2033 (USD Million)

Fig. 31 US licensed merchandise market estimates & forecasts, through other channels, 2021 - 2033 (USD)

Fig. 32 Key company categorization

Fig. 33 Company market share analysis, 2025

Fig. 34 Strategic framework of US licensed merchandise market

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