

Global Brand Licensing Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global Brand Licensing market size is predicted to grow from US\$ 375914 million in 2025 to US\$ 518601 million in 2032; it is expected to grow at a CAGR of 4.8% from 2026 to 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.

LPI (LP Information)' newest research report, the “Brand Licensing Industry Forecast” looks at past sales and reviews total world Brand Licensing sales in 2025, providing a comprehensive analysis by region and market sector of projected Brand Licensing sales for 2026 through 2032. With Brand Licensing sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Brand Licensing industry.

This Insight Report provides a comprehensive analysis of the global Brand Licensing

landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on Brand Licensing portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Brand Licensing market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Brand Licensing and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Brand Licensing.

This report presents a comprehensive overview, market shares, and growth opportunities of Brand Licensing market by product type, application, key players and key regions and countries.

Segmentation by Type:

Apparels

Toys

Accessories

Home Decoration

Software/Video Games

Food and Beverage

Others

Segmentation by Application:

Entertainment

Corporate Trademarks/Brand

Fashion

Sports

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analyzing the company's coverage, product portfolio, its market penetration.

The Walt Disney Company

Authentic Brands Group

People Inc.

NBCUniversal

Hasbro

Warner Bros. Discovery

The Pok?mon 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

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview

- 2.1.1 Global Brand Licensing Market Size (2021-2032)
- 2.1.2 Brand Licensing Market Size CAGR by Region (2021 VS 2025 VS 2032)
- 2.1.3 World Current & Future Analysis for Brand Licensing by Country/Region (2021, 2025 & 2032)

2.2 Brand Licensing Segment by Type

- 2.2.1 Apparels
- 2.2.2 Toys
- 2.2.3 Accessories
- 2.2.4 Home Decoration
- 2.2.5 Software/Video Games
- 2.2.6 Food and Beverage
- 2.2.7 Others
- 2.2.8 Brand Licensing Market Size by Type
 - 2.2.8.1 Brand Licensing Market Size CAGR by Type (2021 VS 2025 VS 2032)
 - 2.2.8.2 Global Brand Licensing Market Size Market Share by Type (2021-2026)

2.3 Brand Licensing Segment by Application

- 2.3.1 Entertainment
- 2.3.2 Corporate Trademarks/Brand
- 2.3.3 Fashion
- 2.3.4 Sports
- 2.3.5 Others
- 2.3.6 Brand Licensing Market Size by Application
 - 2.3.6.1 Brand Licensing Market Size CAGR by Application (2021 VS 2025 VS 2032)

2.3.6.2 Global Brand Licensing Market Size Market Share by Application (2021-2026)

3 BRAND LICENSING MARKET SIZE BY PLAYER

3.1 Brand Licensing Market Size Market Share by Player

3.1.1 Global Brand Licensing Revenue by Player (2021-2026)

3.1.2 Global Brand Licensing Revenue Market Share by Player (2021-2026)

3.2 Global Brand Licensing Key Players Head office and Products Offered

3.3 Market Concentration Rate Analysis

3.3.1 Competition Landscape Analysis

3.3.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

3.4 New Products and Potential Entrants

3.5 Mergers & Acquisitions, Expansion

4 BRAND LICENSING BY REGION

4.1 Brand Licensing Market Size by Region (2021-2026)

4.2 Global Brand Licensing Annual Revenue by Country/Region (2021-2026)

4.3 Americas Brand Licensing Market Size Growth (2021-2026)

4.4 APAC Brand Licensing Market Size Growth (2021-2026)

4.5 Europe Brand Licensing Market Size Growth (2021-2026)

4.6 Middle East & Africa Brand Licensing Market Size Growth (2021-2026)

5 AMERICAS

5.1 Americas Brand Licensing Market Size by Country (2021-2026)

5.2 Americas Brand Licensing Market Size by Type (2021-2026)

5.3 Americas Brand Licensing Market Size by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Brand Licensing Market Size by Region (2021-2026)

6.2 APAC Brand Licensing Market Size by Type (2021-2026)

6.3 APAC Brand Licensing Market Size by Application (2021-2026)

6.4 China

- 6.5 Japan
- 6.6 South Korea
- 6.7 Southeast Asia
- 6.8 India
- 6.9 Australia

7 EUROPE

- 7.1 Europe Brand Licensing Market Size by Country (2021-2026)
- 7.2 Europe Brand Licensing Market Size by Type (2021-2026)
- 7.3 Europe Brand Licensing Market Size by Application (2021-2026)
- 7.4 Germany
- 7.5 France
- 7.6 UK
- 7.7 Italy
- 7.8 Russia

8 MIDDLE EAST & AFRICA

- 8.1 Middle East & Africa Brand Licensing by Region (2021-2026)
- 8.2 Middle East & Africa Brand Licensing Market Size by Type (2021-2026)
- 8.3 Middle East & Africa Brand Licensing Market Size by Application (2021-2026)
- 8.4 Egypt
- 8.5 South Africa
- 8.6 Israel
- 8.7 Turkey
- 8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

- 9.1 Market Drivers & Growth Opportunities
- 9.2 Market Challenges & Risks
- 9.3 Industry Trends

10 GLOBAL BRAND LICENSING MARKET FORECAST

- 10.1 Global Brand Licensing Forecast by Region (2027-2032)
 - 10.1.1 Global Brand Licensing Forecast by Region (2027-2032)
 - 10.1.2 Americas Brand Licensing Forecast

- 10.1.3 APAC Brand Licensing Forecast
- 10.1.4 Europe Brand Licensing Forecast
- 10.1.5 Middle East & Africa Brand Licensing Forecast
- 10.2 Americas Brand Licensing Forecast by Country (2027-2032)
 - 10.2.1 United States Market Brand Licensing Forecast
 - 10.2.2 Canada Market Brand Licensing Forecast
 - 10.2.3 Mexico Market Brand Licensing Forecast
 - 10.2.4 Brazil Market Brand Licensing Forecast
- 10.3 APAC Brand Licensing Forecast by Region (2027-2032)
 - 10.3.1 China Brand Licensing Market Forecast
 - 10.3.2 Japan Market Brand Licensing Forecast
 - 10.3.3 Korea Market Brand Licensing Forecast
 - 10.3.4 Southeast Asia Market Brand Licensing Forecast
 - 10.3.5 India Market Brand Licensing Forecast
 - 10.3.6 Australia Market Brand Licensing Forecast
- 10.4 Europe Brand Licensing Forecast by Country (2027-2032)
 - 10.4.1 Germany Market Brand Licensing Forecast
 - 10.4.2 France Market Brand Licensing Forecast
 - 10.4.3 UK Market Brand Licensing Forecast
 - 10.4.4 Italy Market Brand Licensing Forecast
 - 10.4.5 Russia Market Brand Licensing Forecast
- 10.5 Middle East & Africa Brand Licensing Forecast by Region (2027-2032)
 - 10.5.1 Egypt Market Brand Licensing Forecast
 - 10.5.2 South Africa Market Brand Licensing Forecast
 - 10.5.3 Israel Market Brand Licensing Forecast
 - 10.5.4 Turkey Market Brand Licensing Forecast
- 10.6 Global Brand Licensing Forecast by Type (2027-2032)
- 10.7 Global Brand Licensing Forecast by Application (2027-2032)
 - 10.7.1 GCC Countries Market Brand Licensing Forecast

11 KEY PLAYERS ANALYSIS

- 11.1 The Walt Disney Company
 - 11.1.1 The Walt Disney Company Company Information
 - 11.1.2 The Walt Disney Company Brand Licensing Product Offered
 - 11.1.3 The Walt Disney Company Brand Licensing Revenue, Gross Margin and Market Share (2021-2026)
 - 11.1.4 The Walt Disney Company Main Business Overview
 - 11.1.5 The Walt Disney Company Latest Developments

11.2 Authentic Brands Group

11.2.1 Authentic Brands Group Company Information

11.2.2 Authentic Brands Group Brand Licensing Product Offered

11.2.3 Authentic Brands Group Brand Licensing Revenue, Gross Margin and Market Share (2021-2026)

11.2.4 Authentic Brands Group Main Business Overview

11.2.5 Authentic Brands Group Latest Developments

11.3 People Inc.

11.3.1 People Inc. Company Information

11.3.2 People Inc. Brand Licensing Product Offered

11.3.3 People Inc. Brand Licensing Revenue, Gross Margin and Market Share (2021-2026)

11.3.4 People Inc. Main Business Overview

11.3.5 People Inc. Latest Developments

11.4 NBCUniversal

11.4.1 NBCUniversal Company Information

11.4.2 NBCUniversal Brand Licensing Product Offered

11.4.3 NBCUniversal Brand Licensing Revenue, Gross Margin and Market Share (2021-2026)

11.4.4 NBCUniversal Main Business Overview

11.4.5 NBCUniversal Latest Developments

11.5 Hasbro

11.5.1 Hasbro Company Information

11.5.2 Hasbro Brand Licensing Product Offered

11.5.3 Hasbro Brand Licensing Revenue, Gross Margin and Market Share (2021-2026)

11.5.4 Hasbro Main Business Overview

11.5.5 Hasbro Latest Developments

11.6 Warner Bros. Discovery

11.6.1 Warner Bros. Discovery Company Information

11.6.2 Warner Bros. Discovery Brand Licensing Product Offered

11.6.3 Warner Bros. Discovery Brand Licensing Revenue, Gross Margin and Market Share (2021-2026)

11.6.4 Warner Bros. Discovery Main Business Overview

11.6.5 Warner Bros. Discovery Latest Developments

11.7 The Pok?mon Company

11.7.1 The Pok?mon Company Company Information

11.7.2 The Pok?mon Company Brand Licensing Product Offered

11.7.3 The Pok?mon Company Brand Licensing Revenue, Gross Margin and Market

Share (2021-2026)

11.7.4 The Pok?mon Company Main Business Overview

11.7.5 The Pok?mon Company Latest Developments

11.8 Bluestar Alliance

11.8.1 Bluestar Alliance Company Information

11.8.2 Bluestar Alliance Brand Licensing Product Offered

11.8.3 Bluestar Alliance Brand Licensing Revenue, Gross Margin and Market Share (2021-2026)

11.8.4 Bluestar Alliance Main Business Overview

11.8.5 Bluestar Alliance Latest Developments

11.9 Mattel

11.9.1 Mattel Company Information

11.9.2 Mattel Brand Licensing Product Offered

11.9.3 Mattel Brand Licensing Revenue, Gross Margin and Market Share (2021-2026)

11.9.4 Mattel Main Business Overview

11.9.5 Mattel Latest Developments

11.10 Sanrio

11.10.1 Sanrio Company Information

11.10.2 Sanrio Brand Licensing Product Offered

11.10.3 Sanrio Brand Licensing Revenue, Gross Margin and Market Share (2021-2026)

11.10.4 Sanrio Main Business Overview

11.10.5 Sanrio Latest Developments

11.11 WHP Global

11.11.1 WHP Global Company Information

11.11.2 WHP Global Brand Licensing Product Offered

11.11.3 WHP Global Brand Licensing Revenue, Gross Margin and Market Share (2021-2026)

11.11.4 WHP Global Main Business Overview

11.11.5 WHP Global Latest Developments

11.12 Paramount Consumer Products

11.12.1 Paramount Consumer Products Company Information

11.12.2 Paramount Consumer Products Brand Licensing Product Offered

11.12.3 Paramount Consumer Products Brand Licensing Revenue, Gross Margin and Market Share (2021-2026)

11.12.4 Paramount Consumer Products Main Business Overview

11.12.5 Paramount Consumer Products Latest Developments

11.13 Toei Animation

11.13.1 Toei Animation Company Information

- 11.13.2 Toei Animation Brand Licensing Product Offered
- 11.13.3 Toei Animation Brand Licensing Revenue, Gross Margin and Market Share (2021-2026)
- 11.13.4 Toei Animation Main Business Overview
- 11.13.5 Toei Animation Latest Developments
- 11.14 The Electrolux Group
 - 11.14.1 The Electrolux Group Company Information
 - 11.14.2 The Electrolux Group Brand Licensing Product Offered
 - 11.14.3 The Electrolux Group Brand Licensing Revenue, Gross Margin and Market Share (2021-2026)
 - 11.14.4 The Electrolux Group Main Business Overview
 - 11.14.5 The Electrolux Group Latest Developments
- 11.15 Procter & Gamble
 - 11.15.1 Procter & Gamble Company Information
 - 11.15.2 Procter & Gamble Brand Licensing Product Offered
 - 11.15.3 Procter & Gamble Brand Licensing Revenue, Gross Margin and Market Share (2021-2026)
 - 11.15.4 Procter & Gamble Main Business Overview
 - 11.15.5 Procter & Gamble Latest Developments
- 11.16 Whirlpool Corporation
 - 11.16.1 Whirlpool Corporation Company Information
 - 11.16.2 Whirlpool Corporation Brand Licensing Product Offered
 - 11.16.3 Whirlpool Corporation Brand Licensing Revenue, Gross Margin and Market Share (2021-2026)
 - 11.16.4 Whirlpool Corporation Main Business Overview
 - 11.16.5 Whirlpool Corporation Latest Developments
- 11.17 BBC Studios
 - 11.17.1 BBC Studios Company Information
 - 11.17.2 BBC Studios Brand Licensing Product Offered
 - 11.17.3 BBC Studios Brand Licensing Revenue, Gross Margin and Market Share (2021-2026)
 - 11.17.4 BBC Studios Main Business Overview
 - 11.17.5 BBC Studios Latest Developments
- 11.18 Wildbrain
 - 11.18.1 Wildbrain Company Information
 - 11.18.2 Wildbrain Brand Licensing Product Offered
 - 11.18.3 Wildbrain Brand Licensing Revenue, Gross Margin and Market Share (2021-2026)
 - 11.18.4 Wildbrain Main Business Overview

- 11.18.5 Wildbrain Latest Developments
- 11.19 Serta Simmons Bedding
 - 11.19.1 Serta Simmons Bedding Company Information
 - 11.19.2 Serta Simmons Bedding Brand Licensing Product Offered
 - 11.19.3 Serta Simmons Bedding Brand Licensing Revenue, Gross Margin and Market Share (2021-2026)
 - 11.19.4 Serta Simmons Bedding Main Business Overview
 - 11.19.5 Serta Simmons Bedding Latest Developments
- 11.20 Stanley Black & Decker
 - 11.20.1 Stanley Black & Decker Company Information
 - 11.20.2 Stanley Black & Decker Brand Licensing Product Offered
 - 11.20.3 Stanley Black & Decker Brand Licensing Revenue, Gross Margin and Market Share (2021-2026)
 - 11.20.4 Stanley Black & Decker Main Business Overview
 - 11.20.5 Stanley Black & Decker Latest Developments
- 11.21 Caterpillar
 - 11.21.1 Caterpillar Company Information
 - 11.21.2 Caterpillar Brand Licensing Product Offered
 - 11.21.3 Caterpillar Brand Licensing Revenue, Gross Margin and Market Share (2021-2026)
 - 11.21.4 Caterpillar Main Business Overview
 - 11.21.5 Caterpillar Latest Developments
- 11.22 Bandai Namco Group
 - 11.22.1 Bandai Namco Group Company Information
 - 11.22.2 Bandai Namco Group Brand Licensing Product Offered
 - 11.22.3 Bandai Namco Group Brand Licensing Revenue, Gross Margin and Market Share (2021-2026)
 - 11.22.4 Bandai Namco Group Main Business Overview
 - 11.22.5 Bandai Namco Group Latest Developments
- 11.23 U.S. Polo Assn.
 - 11.23.1 U.S. Polo Assn. Company Information
 - 11.23.2 U.S. Polo Assn. Brand Licensing Product Offered
 - 11.23.3 U.S. Polo Assn. Brand Licensing Revenue, Gross Margin and Market Share (2021-2026)
 - 11.23.4 U.S. Polo Assn. Main Business Overview
 - 11.23.5 U.S. Polo Assn. Latest Developments
- 11.24 NFL Players Inc.
 - 11.24.1 NFL Players Inc. Company Information
 - 11.24.2 NFL Players Inc. Brand Licensing Product Offered

11.24.3 NFL Players Inc. Brand Licensing Revenue, Gross Margin and Market Share (2021-2026)

11.24.4 NFL Players Inc. Main Business Overview

11.24.5 NFL Players Inc. Latest Developments

11.25 Rainbow

11.25.1 Rainbow Company Information

11.25.2 Rainbow Brand Licensing Product Offered

11.25.3 Rainbow Brand Licensing Revenue, Gross Margin and Market Share (2021-2026)

11.25.4 Rainbow Main Business Overview

11.25.5 Rainbow Latest Developments

11.26 Dr. Seuss Enterprises

11.26.1 Dr. Seuss Enterprises Company Information

11.26.2 Dr. Seuss Enterprises Brand Licensing Product Offered

11.26.3 Dr. Seuss Enterprises Brand Licensing Revenue, Gross Margin and Market Share (2021-2026)

11.26.4 Dr. Seuss Enterprises Main Business Overview

11.26.5 Dr. Seuss Enterprises Latest Developments

11.27 The Hershey Company

11.27.1 The Hershey Company Company Information

11.27.2 The Hershey Company Brand Licensing Product Offered

11.27.3 The Hershey Company Brand Licensing Revenue, Gross Margin and Market Share (2021-2026)

11.27.4 The Hershey Company Main Business Overview

11.27.5 The Hershey Company Latest Developments

11.28 Nissan Motor Corporation

11.28.1 Nissan Motor Corporation Company Information

11.28.2 Nissan Motor Corporation Brand Licensing Product Offered

11.28.3 Nissan Motor Corporation Brand Licensing Revenue, Gross Margin and Market Share (2021-2026)

11.28.4 Nissan Motor Corporation Main Business Overview

11.28.5 Nissan Motor Corporation Latest Developments

11.29 GoTo Foods

11.29.1 GoTo Foods Company Information

11.29.2 GoTo Foods Brand Licensing Product Offered

11.29.3 GoTo Foods Brand Licensing Revenue, Gross Margin and Market Share (2021-2026)

11.29.4 GoTo Foods Main Business Overview

11.29.5 GoTo Foods Latest Developments

11.30 BMW Group

11.30.1 BMW Group Company Information

11.30.2 BMW Group Brand Licensing Product Offered

11.30.3 BMW Group Brand Licensing Revenue, Gross Margin and Market Share
(2021-2026)

11.30.4 BMW Group Main Business Overview

11.30.5 BMW Group Latest Developments

11.31 Jazwares

11.31.1 Jazwares Company Information

11.31.2 Jazwares Brand Licensing Product Offered

11.31.3 Jazwares Brand Licensing Revenue, Gross Margin and Market Share
(2021-2026)

11.31.4 Jazwares Main Business Overview

11.31.5 Jazwares Latest Developments

11.32 Sunkist Growers

11.32.1 Sunkist Growers Company Information

11.32.2 Sunkist Growers Brand Licensing Product Offered

11.32.3 Sunkist Growers Brand Licensing Revenue, Gross Margin and Market Share
(2021-2026)

11.32.4 Sunkist Growers Main Business Overview

11.32.5 Sunkist Growers Latest Developments

11.33 SEGA

11.33.1 SEGA Company Information

11.33.2 SEGA Brand Licensing Product Offered

11.33.3 SEGA Brand Licensing Revenue, Gross Margin and Market Share
(2021-2026)

11.33.4 SEGA Main Business Overview

11.33.5 SEGA Latest Developments

11.34 PGA Tour

11.34.1 PGA Tour Company Information

11.34.2 PGA Tour Brand Licensing Product Offered

11.34.3 PGA Tour Brand Licensing Revenue, Gross Margin and Market Share
(2021-2026)

11.34.4 PGA Tour Main Business Overview

11.34.5 PGA Tour Latest Developments

11.35 Sesame Workshop

11.35.1 Sesame Workshop Company Information

11.35.2 Sesame Workshop Brand Licensing Product Offered

11.35.3 Sesame Workshop Brand Licensing Revenue, Gross Margin and Market

Share (2021-2026)

11.35.4 Sesame Workshop Main Business Overview

11.35.5 Sesame Workshop Latest Developments

11.36 Church and Dwight

11.36.1 Church and Dwight Company Information

11.36.2 Church and Dwight Brand Licensing Product Offered

11.36.3 Church and Dwight Brand Licensing Revenue, Gross Margin and Market

Share (2021-2026)

11.36.4 Church and Dwight Main Business Overview

11.36.5 Church and Dwight Latest Developments

11.37 Alpha Group

11.37.1 Alpha Group Company Information

11.37.2 Alpha Group Brand Licensing Product Offered

11.37.3 Alpha Group Brand Licensing Revenue, Gross Margin and Market Share

(2021-2026)

11.37.4 Alpha Group Main Business Overview

11.37.5 Alpha Group Latest Developments

11.38 Shanghai Skynet Brand Management

11.38.1 Shanghai Skynet Brand Management Company Information

11.38.2 Shanghai Skynet Brand Management Brand Licensing Product Offered

11.38.3 Shanghai Skynet Brand Management Brand Licensing Revenue, Gross

Margin and Market Share (2021-2026)

11.38.4 Shanghai Skynet Brand Management Main Business Overview

11.38.5 Shanghai Skynet Brand Management Latest Developments

12 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

- Table 1. Brand Licensing Market Size CAGR by Region (2021 VS 2025 VS 2032) & (\$ millions)
- Table 2. Brand Licensing Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)
- Table 3. Major Players of Apparels
- Table 4. Major Players of Toys
- Table 5. Major Players of Accessories
- Table 6. Major Players of Home Decoration
- Table 7. Major Players of Software/Video Games
- Table 8. Major Players of Food and Beverage
- Table 9. Major Players of Others
- Table 10. Brand Licensing Market Size CAGR by Type (2021 VS 2025 VS 2032) & (\$ millions)
- Table 11. Global Brand Licensing Market Size by Type (2021-2026) & (\$ millions)
- Table 12. Global Brand Licensing Market Size Market Share by Type (2021-2026)
- Table 13. Brand Licensing Market Size CAGR by Application (2021 VS 2025 VS 2032) & (\$ millions)
- Table 14. Global Brand Licensing Market Size by Application (2021-2026) & (\$ millions)
- Table 15. Global Brand Licensing Market Size Market Share by Application (2021-2026)
- Table 16. Global Brand Licensing Revenue by Player (2021-2026) & (\$ millions)
- Table 17. Global Brand Licensing Revenue Market Share by Player (2021-2026)
- Table 18. Brand Licensing Key Players Head office and Products Offered
- Table 19. Brand Licensing Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
- Table 20. New Products and Potential Entrants
- Table 21. Mergers & Acquisitions, Expansion
- Table 22. Global Brand Licensing Market Size by Region (2021-2026) & (\$ millions)
- Table 23. Global Brand Licensing Market Size Market Share by Region (2021-2026)
- Table 24. Global Brand Licensing Revenue by Country/Region (2021-2026) & (\$ millions)
- Table 25. Global Brand Licensing Revenue Market Share by Country/Region (2021-2026)
- Table 26. Americas Brand Licensing Market Size by Country (2021-2026) & (\$ millions)
- Table 27. Americas Brand Licensing Market Size Market Share by Country (2021-2026)
- Table 28. Americas Brand Licensing Market Size by Type (2021-2026) & (\$ millions)
- Table 29. Americas Brand Licensing Market Size Market Share by Type (2021-2026)

Table 30. Americas Brand Licensing Market Size by Application (2021-2026) & (\$ millions)

Table 31. Americas Brand Licensing Market Size Market Share by Application (2021-2026)

Table 32. APAC Brand Licensing Market Size by Region (2021-2026) & (\$ millions)

Table 33. APAC Brand Licensing Market Size Market Share by Region (2021-2026)

Table 34. APAC Brand Licensing Market Size by Type (2021-2026) & (\$ millions)

Table 35. APAC Brand Licensing Market Size by Application (2021-2026) & (\$ millions)

Table 36. Europe Brand Licensing Market Size by Country (2021-2026) & (\$ millions)

Table 37. Europe Brand Licensing Market Size Market Share by Country (2021-2026)

Table 38. Europe Brand Licensing Market Size by Type (2021-2026) & (\$ millions)

Table 39. Europe Brand Licensing Market Size by Application (2021-2026) & (\$ millions)

Table 40. Middle East & Africa Brand Licensing Market Size by Region (2021-2026) & (\$ millions)

Table 41. Middle East & Africa Brand Licensing Market Size by Type (2021-2026) & (\$ millions)

Table 42. Middle East & Africa Brand Licensing Market Size by Application (2021-2026) & (\$ millions)

Table 43. Key Market Drivers & Growth Opportunities of Brand Licensing

Table 44. Key Market Challenges & Risks of Brand Licensing

Table 45. Key Industry Trends of Brand Licensing

Table 46. Global Brand Licensing Market Size Forecast by Region (2027-2032) & (\$ millions)

Table 47. Global Brand Licensing Market Size Market Share Forecast by Region (2027-2032)

Table 48. Global Brand Licensing Market Size Forecast by Type (2027-2032) & (\$ millions)

Table 49. Global Brand Licensing Market Size Forecast by Application (2027-2032) & (\$ millions)

Table 50. The Walt Disney Company Details, Company Type, Brand Licensing Area Served and Its Competitors

Table 51. The Walt Disney Company Brand Licensing Product Offered

Table 52. The Walt Disney Company Brand Licensing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 53. The Walt Disney Company Main Business

Table 54. The Walt Disney Company Latest Developments

Table 55. Authentic Brands Group Details, Company Type, Brand Licensing Area Served and Its Competitors

Table 56. Authentic Brands Group Brand Licensing Product Offered

Table 57. Authentic Brands Group Brand Licensing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 58. Authentic Brands Group Main Business

Table 59. Authentic Brands Group Latest Developments

Table 60. People Inc. Details, Company Type, Brand Licensing Area Served and Its Competitors

Table 61. People Inc. Brand Licensing Product Offered

Table 62. People Inc. Brand Licensing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 63. People Inc. Main Business

Table 64. People Inc. Latest Developments

Table 65. NBCUniversal Details, Company Type, Brand Licensing Area Served and Its Competitors

Table 66. NBCUniversal Brand Licensing Product Offered

Table 67. NBCUniversal Brand Licensing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 68. NBCUniversal Main Business

Table 69. NBCUniversal Latest Developments

Table 70. Hasbro Details, Company Type, Brand Licensing Area Served and Its Competitors

Table 71. Hasbro Brand Licensing Product Offered

Table 72. Hasbro Brand Licensing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 73. Hasbro Main Business

Table 74. Hasbro Latest Developments

Table 75. Warner Bros. Discovery Details, Company Type, Brand Licensing Area Served and Its Competitors

Table 76. Warner Bros. Discovery Brand Licensing Product Offered

Table 77. Warner Bros. Discovery Brand Licensing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 78. Warner Bros. Discovery Main Business

Table 79. Warner Bros. Discovery Latest Developments

Table 80. The Pok?mon Company Details, Company Type, Brand Licensing Area Served and Its Competitors

Table 81. The Pok?mon Company Brand Licensing Product Offered

Table 82. The Pok?mon Company Brand Licensing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 83. The Pok?mon Company Main Business

Table 84. The Pok?mon Company Latest Developments

Table 85. Bluestar Alliance Details, Company Type, Brand Licensing Area Served and Its Competitors

Table 86. Bluestar Alliance Brand Licensing Product Offered

Table 87. Bluestar Alliance Brand Licensing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 88. Bluestar Alliance Main Business

Table 89. Bluestar Alliance Latest Developments

Table 90. Mattel Details, Company Type, Brand Licensing Area Served and Its Competitors

Table 91. Mattel Brand Licensing Product Offered

Table 92. Mattel Brand Licensing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 93. Mattel Main Business

Table 94. Mattel Latest Developments

Table 95. Sanrio Details, Company Type, Brand Licensing Area Served and Its Competitors

Table 96. Sanrio Brand Licensing Product Offered

Table 97. Sanrio Brand Licensing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 98. Sanrio Main Business

Table 99. Sanrio Latest Developments

Table 100. WHP Global Details, Company Type, Brand Licensing Area Served and Its Competitors

Table 101. WHP Global Brand Licensing Product Offered

Table 102. WHP Global Brand Licensing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 103. WHP Global Main Business

Table 104. WHP Global Latest Developments

Table 105. Paramount Consumer Products Details, Company Type, Brand Licensing Area Served and Its Competitors

Table 106. Paramount Consumer Products Brand Licensing Product Offered

Table 107. Paramount Consumer Products Brand Licensing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 108. Paramount Consumer Products Main Business

Table 109. Paramount Consumer Products Latest Developments

Table 110. Toei Animation Details, Company Type, Brand Licensing Area Served and Its Competitors

Table 111. Toei Animation Brand Licensing Product Offered

Table 112. Toei Animation Brand Licensing Revenue (\$ million), Gross Margin and

Market Share (2021-2026)

Table 113. Toei Animation Main Business

Table 114. Toei Animation Latest Developments

Table 115. The Electrolux Group Details, Company Type, Brand Licensing Area Served and Its Competitors

Table 116. The Electrolux Group Brand Licensing Product Offered

Table 117. The Electrolux Group Brand Licensing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 118. The Electrolux Group Main Business

Table 119. The Electrolux Group Latest Developments

Table 120. Procter & Gamble Details, Company Type, Brand Licensing Area Served and Its Competitors

Table 121. Procter & Gamble Brand Licensing Product Offered

Table 122. Procter & Gamble Brand Licensing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 123. Procter & Gamble Main Business

Table 124. Procter & Gamble Latest Developments

Table 125. Whirlpool Corporation Details, Company Type, Brand Licensing Area Served and Its Competitors

Table 126. Whirlpool Corporation Brand Licensing Product Offered

Table 127. Whirlpool Corporation Brand Licensing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 128. Whirlpool Corporation Main Business

Table 129. Whirlpool Corporation Latest Developments

Table 130. BBC Studios Details, Company Type, Brand Licensing Area Served and Its Competitors

Table 131. BBC Studios Brand Licensing Product Offered

Table 132. BBC Studios Brand Licensing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 133. BBC Studios Main Business

Table 134. BBC Studios Latest Developments

Table 135. Wildbrain Details, Company Type, Brand Licensing Area Served and Its Competitors

Table 136. Wildbrain Brand Licensing Product Offered

Table 137. Wildbrain Brand Licensing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 138. Wildbrain Main Business

Table 139. Wildbrain Latest Developments

Table 140. Serta Simmons Bedding Details, Company Type, Brand Licensing Area

Served and Its Competitors

Table 141. Serta Simmons Bedding Brand Licensing Product Offered

Table 142. Serta Simmons Bedding Brand Licensing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 143. Serta Simmons Bedding Main Business

Table 144. Serta Simmons Bedding Latest Developments

Table 145. Stanley Black & Decker Details, Company Type, Brand Licensing Area Served and Its Competitors

Table 146. Stanley Black & Decker Brand Licensing Product Offered

Table 147. Stanley Black & Decker Brand Licensing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 148. Stanley Black & Decker Main Business

Table 149. Stanley Black & Decker Latest Developments

Table 150. Caterpillar Details, Company Type, Brand Licensing Area Served and Its Competitors

Table 151. Caterpillar Brand Licensing Product Offered

Table 152. Caterpillar Brand Licensing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 153. Caterpillar Main Business

Table 154. Caterpillar Latest Developments

Table 155. Bandai Namco Group Details, Company Type, Brand Licensing Area Served and Its Competitors

Table 156. Bandai Namco Group Brand Licensing Product Offered

Table 157. Bandai Namco Group Brand Licensing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 158. Bandai Namco Group Main Business

Table 159. Bandai Namco Group Latest Developments

Table 160. U.S. Polo Assn. Details, Company Type, Brand Licensing Area Served and Its Competitors

Table 161. U.S. Polo Assn. Brand Licensing Product Offered

Table 162. U.S. Polo Assn. Brand Licensing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 163. U.S. Polo Assn. Main Business

Table 164. U.S. Polo Assn. Latest Developments

Table 165. NFL Players Inc. Details, Company Type, Brand Licensing Area Served and Its Competitors

Table 166. NFL Players Inc. Brand Licensing Product Offered

Table 167. NFL Players Inc. Brand Licensing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

- Table 168. NFL Players Inc. Main Business
- Table 169. NFL Players Inc. Latest Developments
- Table 170. Rainbow Details, Company Type, Brand Licensing Area Served and Its Competitors
- Table 171. Rainbow Brand Licensing Product Offered
- Table 172. Rainbow Brand Licensing Revenue (\$ million), Gross Margin and Market Share (2021-2026)
- Table 173. Rainbow Main Business
- Table 174. Rainbow Latest Developments
- Table 175. Dr. Seuss Enterprises Details, Company Type, Brand Licensing Area Served and Its Competitors
- Table 176. Dr. Seuss Enterprises Brand Licensing Product Offered
- Table 177. Dr. Seuss Enterprises Brand Licensing Revenue (\$ million), Gross Margin and Market Share (2021-2026)
- Table 178. Dr. Seuss Enterprises Main Business
- Table 179. Dr. Seuss Enterprises Latest Developments
- Table 180. The Hershey Company Details, Company Type, Brand Licensing Area Served and Its Competitors
- Table 181. The Hershey Company Brand Licensing Product Offered
- Table 182. The Hershey Company Brand Licensing Revenue (\$ million), Gross Margin and Market Share (2021-2026)
- Table 183. The Hershey Company Main Business
- Table 184. The Hershey Company Latest Developments
- Table 185. Nissan Motor Corporation Details, Company Type, Brand Licensing Area Served and Its Competitors
- Table 186. Nissan Motor Corporation Brand Licensing Product Offered
- Table 187. Nissan Motor Corporation Brand Licensing Revenue (\$ million), Gross Margin and Market Share (2021-2026)
- Table 188. Nissan Motor Corporation Main Business
- Table 189. Nissan Motor Corporation Latest Developments
- Table 190. GoTo Foods Details, Company Type, Brand Licensing Area Served and Its Competitors
- Table 191. GoTo Foods Brand Licensing Product Offered
- Table 192. GoTo Foods Brand Licensing Revenue (\$ million), Gross Margin and Market Share (2021-2026)
- Table 193. GoTo Foods Main Business
- Table 194. GoTo Foods Latest Developments
- Table 195. BMW Group Details, Company Type, Brand Licensing Area Served and Its Competitors

Table 196. BMW Group Brand Licensing Product Offered

Table 197. BMW Group Brand Licensing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 198. BMW Group Main Business

Table 199. BMW Group Latest Developments

Table 200. Jazwares Details, Company Type, Brand Licensing Area Served and Its Competitors

Table 201. Jazwares Brand Licensing Product Offered

Table 202. Jazwares Brand Licensing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 203. Jazwares Main Business

Table 204. Jazwares Latest Developments

Table 205. Sunkist Growers Details, Company Type, Brand Licensing Area Served and Its Competitors

Table 206. Sunkist Growers Brand Licensing Product Offered

Table 207. Sunkist Growers Brand Licensing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 208. Sunkist Growers Main Business

Table 209. Sunkist Growers Latest Developments

Table 210. SEGA Details, Company Type, Brand Licensing Area Served and Its Competitors

Table 211. SEGA Brand Licensing Product Offered

Table 212. SEGA Brand Licensing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 213. SEGA Main Business

Table 214. SEGA Latest Developments

Table 215. PGA Tour Details, Company Type, Brand Licensing Area Served and Its Competitors

Table 216. PGA Tour Brand Licensing Product Offered

Table 217. PGA Tour Brand Licensing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 218. PGA Tour Main Business

Table 219. PGA Tour Latest Developments

Table 220. Sesame Workshop Details, Company Type, Brand Licensing Area Served and Its Competitors

Table 221. Sesame Workshop Brand Licensing Product Offered

Table 222. Sesame Workshop Brand Licensing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 223. Sesame Workshop Main Business

Table 224. Sesame Workshop Latest Developments

Table 225. Church and Dwight Details, Company Type, Brand Licensing Area Served and Its Competitors

Table 226. Church and Dwight Brand Licensing Product Offered

Table 227. Church and Dwight Brand Licensing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 228. Church and Dwight Main Business

Table 229. Church and Dwight Latest Developments

Table 230. Alpha Group Details, Company Type, Brand Licensing Area Served and Its Competitors

Table 231. Alpha Group Brand Licensing Product Offered

Table 232. Alpha Group Brand Licensing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 233. Alpha Group Main Business

Table 234. Alpha Group Latest Developments

Table 235. Shanghai Skynet Brand Management Details, Company Type, Brand Licensing Area Served and Its Competitors

Table 236. Shanghai Skynet Brand Management Brand Licensing Product Offered

Table 237. Shanghai Skynet Brand Management Brand Licensing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 238. Shanghai Skynet Brand Management Main Business

Table 239. Shanghai Skynet Brand Management Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Brand Licensing Report Years Considered
- Figure 2. Research Objectives
- Figure 3. Research Methodology
- Figure 4. Research Process and Data Source
- Figure 5. Global Brand Licensing Market Size Growth Rate (2021-2032) (\$ millions)
- Figure 6. Brand Licensing Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 7. Brand Licensing Sales Market Share by Country/Region (2025)
- Figure 8. Brand Licensing Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 9. Global Brand Licensing Market Size Market Share by Type in 2025
- Figure 10. Brand Licensing in Entertainment
- Figure 11. Global Brand Licensing Market: Entertainment (2021-2026) & (\$ millions)
- Figure 12. Brand Licensing in Corporate Trademarks/Brand
- Figure 13. Global Brand Licensing Market: Corporate Trademarks/Brand (2021-2026) & (\$ millions)
- Figure 14. Brand Licensing in Fashion
- Figure 15. Global Brand Licensing Market: Fashion (2021-2026) & (\$ millions)
- Figure 16. Brand Licensing in Sports
- Figure 17. Global Brand Licensing Market: Sports (2021-2026) & (\$ millions)
- Figure 18. Brand Licensing in Others
- Figure 19. Global Brand Licensing Market: Others (2021-2026) & (\$ millions)
- Figure 20. Global Brand Licensing Market Size Market Share by Application in 2025
- Figure 21. Global Brand Licensing Revenue Market Share by Player in 2025
- Figure 22. Global Brand Licensing Market Size Market Share by Region (2021-2026)
- Figure 23. Americas Brand Licensing Market Size 2021-2026 (\$ millions)
- Figure 24. APAC Brand Licensing Market Size 2021-2026 (\$ millions)
- Figure 25. Europe Brand Licensing Market Size 2021-2026 (\$ millions)
- Figure 26. Middle East & Africa Brand Licensing Market Size 2021-2026 (\$ millions)
- Figure 27. Americas Brand Licensing Value Market Share by Country in 2025
- Figure 28. United States Brand Licensing Market Size Growth 2021-2026 (\$ millions)
- Figure 29. Canada Brand Licensing Market Size Growth 2021-2026 (\$ millions)
- Figure 30. Mexico Brand Licensing Market Size Growth 2021-2026 (\$ millions)
- Figure 31. Brazil Brand Licensing Market Size Growth 2021-2026 (\$ millions)
- Figure 32. APAC Brand Licensing Market Size Market Share by Region in 2025
- Figure 33. APAC Brand Licensing Market Size Market Share by Type (2021-2026)

- Figure 34. APAC Brand Licensing Market Size Market Share by Application (2021-2026)
- Figure 35. China Brand Licensing Market Size Growth 2021-2026 (\$ millions)
- Figure 36. Japan Brand Licensing Market Size Growth 2021-2026 (\$ millions)
- Figure 37. South Korea Brand Licensing Market Size Growth 2021-2026 (\$ millions)
- Figure 38. Southeast Asia Brand Licensing Market Size Growth 2021-2026 (\$ millions)
- Figure 39. India Brand Licensing Market Size Growth 2021-2026 (\$ millions)
- Figure 40. Australia Brand Licensing Market Size Growth 2021-2026 (\$ millions)
- Figure 41. Europe Brand Licensing Market Size Market Share by Country in 2025
- Figure 42. Europe Brand Licensing Market Size Market Share by Type (2021-2026)
- Figure 43. Europe Brand Licensing Market Size Market Share by Application (2021-2026)
- Figure 44. Germany Brand Licensing Market Size Growth 2021-2026 (\$ millions)
- Figure 45. France Brand Licensing Market Size Growth 2021-2026 (\$ millions)
- Figure 46. UK Brand Licensing Market Size Growth 2021-2026 (\$ millions)
- Figure 47. Italy Brand Licensing Market Size Growth 2021-2026 (\$ millions)
- Figure 48. Russia Brand Licensing Market Size Growth 2021-2026 (\$ millions)
- Figure 49. Middle East & Africa Brand Licensing Market Size Market Share by Region (2021-2026)
- Figure 50. Middle East & Africa Brand Licensing Market Size Market Share by Type (2021-2026)
- Figure 51. Middle East & Africa Brand Licensing Market Size Market Share by Application (2021-2026)
- Figure 52. Egypt Brand Licensing Market Size Growth 2021-2026 (\$ millions)
- Figure 53. South Africa Brand Licensing Market Size Growth 2021-2026 (\$ millions)
- Figure 54. Israel Brand Licensing Market Size Growth 2021-2026 (\$ millions)
- Figure 55. Turkey Brand Licensing Market Size Growth 2021-2026 (\$ millions)
- Figure 56. GCC Countries Brand Licensing Market Size Growth 2021-2026 (\$ millions)
- Figure 57. Americas Brand Licensing Market Size 2027-2032 (\$ millions)
- Figure 58. APAC Brand Licensing Market Size 2027-2032 (\$ millions)
- Figure 59. Europe Brand Licensing Market Size 2027-2032 (\$ millions)
- Figure 60. Middle East & Africa Brand Licensing Market Size 2027-2032 (\$ millions)
- Figure 61. United States Brand Licensing Market Size 2027-2032 (\$ millions)
- Figure 62. Canada Brand Licensing Market Size 2027-2032 (\$ millions)
- Figure 63. Mexico Brand Licensing Market Size 2027-2032 (\$ millions)
- Figure 64. Brazil Brand Licensing Market Size 2027-2032 (\$ millions)
- Figure 65. China Brand Licensing Market Size 2027-2032 (\$ millions)
- Figure 66. Japan Brand Licensing Market Size 2027-2032 (\$ millions)
- Figure 67. Korea Brand Licensing Market Size 2027-2032 (\$ millions)

Figure 68. Southeast Asia Brand Licensing Market Size 2027-2032 (\$ millions)

Figure 69. India Brand Licensing Market Size 2027-2032 (\$ millions)

Figure 70. Australia Brand Licensing Market Size 2027-2032 (\$ millions)

Figure 71. Germany Brand Licensing Market Size 2027-2032 (\$ millions)

Figure 72. France Brand Licensing Market Size 2027-2032 (\$ millions)

Figure 73. UK Brand Licensing Market Size 2027-2032 (\$ millions)

Figure 74. Italy Brand Licensing Market Size 2027-2032 (\$ millions)

Figure 75. Russia Brand Licensing Market Size 2027-2032 (\$ millions)

Figure 76. Egypt Brand Licensing Market Size 2027-2032 (\$ millions)

Figure 77. South Africa Brand Licensing Market Size 2027-2032 (\$ millions)

Figure 78. Israel Brand Licensing Market Size 2027-2032 (\$ millions)

Figure 79. Turkey Brand Licensing Market Size 2027-2032 (\$ millions)

Figure 80. Global Brand Licensing Market Size Market Share Forecast by Type (2027-2032)

Figure 81. Global Brand Licensing Market Size Market Share Forecast by Application (2027-2032)

Figure 82. GCC Countries Brand Licensing Market Size 2027-2032 (\$ millions)

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