

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

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Abstracts

The global Game IP Licensing market size is predicted to grow from US\$ 34693 million in 2025 to US\$ 64345 million in 2032; it is expected to grow at a CAGR of 9.2% from 2026 to 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.

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

This Insight Report provides a comprehensive analysis of the global Game IP 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 Game IP Licensing portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Game IP Licensing market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Game IP Licensing and breaks down the forecast by Licensed Game Assets, by Merchandise Type, 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 Game IP Licensing.

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

Segmentation by Licensed Game Assets:

Character Licensing

Music Licensing

Lore Licensing

Others

Segmentation by Licensing Type:

Exclusive Licensing

Non-Exclusive Licensing

Segmentation by Contract Structure:

Royalty-Based Licensing

Fixed Fee Licensing

Revenue Sharing Licensing

Hybrid Licensing Model

Segmentation by Merchandise Type:

Toys

Apparel

Entertainment & Media

Home Products

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.

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

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