



DATA DRIVEN TRENDS IN LICENSING



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VP GLOBAL MARKETING &

UK MANAGING DIRECTOR

OUR MISSION



CONNECT

DISCOVER

ADVANCE

**EMPOWERING
BRAND
PARTNERSHIPS**

OUR MEMBERS

**Over 1200 member
companies globally**

Licensors

Retailers

Manufacturers

Service Providers

INDUSTRIES

Entertainment

Corporate Brands

Fashion

Sports

Digital

Art

Collegiate

Museums



GLOBAL LICENSING STUDY

METHODOLOGY

- **Conducted by Brandar Consulting LLC**
- **Survey fielded in Q1 2025**
- **Online and in-language phone interviews across 56 countries in all seven major regions**
- **Licensing-specific data from 935 companies globally**
- **Other data sources include International Trade Centre, country-level retail sales, GDP and household consumption, royalty data, and stock market filings**



**\$369.6
BILLION**

**sales of
licensed
products &
services in
2024**

WORLDWIDE RETAIL SALES OF LICENSED PRODUCTS



↑ 3.7% from 2023

in US billions

Licensed products & services outperformed the overall worldwide retail market, which achieved **+3.1% growth**

The image features a dark blue background with a complex geometric pattern of overlapping, semi-transparent lines in various shades of blue and grey, creating a sense of depth and movement. At the top, there are two horizontal bars: a bright cyan one on the left and a yellow one on the right. In the center, a large, solid cyan circle is positioned. Inside this circle, the text "E-COMMERCE" is written in a bold, white, sans-serif font, centered horizontally and vertically.

E-COMMERCE

2024 GLOBAL RETAIL REVENUE BY REGION

North America
\$217.5 Billion
+3.4%

Western Europe
\$67.4 Billion
+2.9%

Eastern Europe
\$11.9 Billion
+5.9%

North Asia
\$36.1 Billion
+4.2%

Middle East & Africa
\$6.2 Billion
+6%

Southeast Asia PAC
\$14.3 Billion
+6.8%

TOTAL WORLDWIDE
\$369.6 Billion
+3.7%

LATAM
\$15.7 Billion
+4.4%

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ALL EUROPE
\$79.3 Billion
+3.4%

Southeast Asia PAC
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TOTAL WORLDWIDE
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LATAM
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South Africa
\$3.3 Billion
+6%

2024 GLOBAL RETAIL REVENUE BY REGION

North America
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5th

GERMANY
\$15.7 Billion
+4.4%

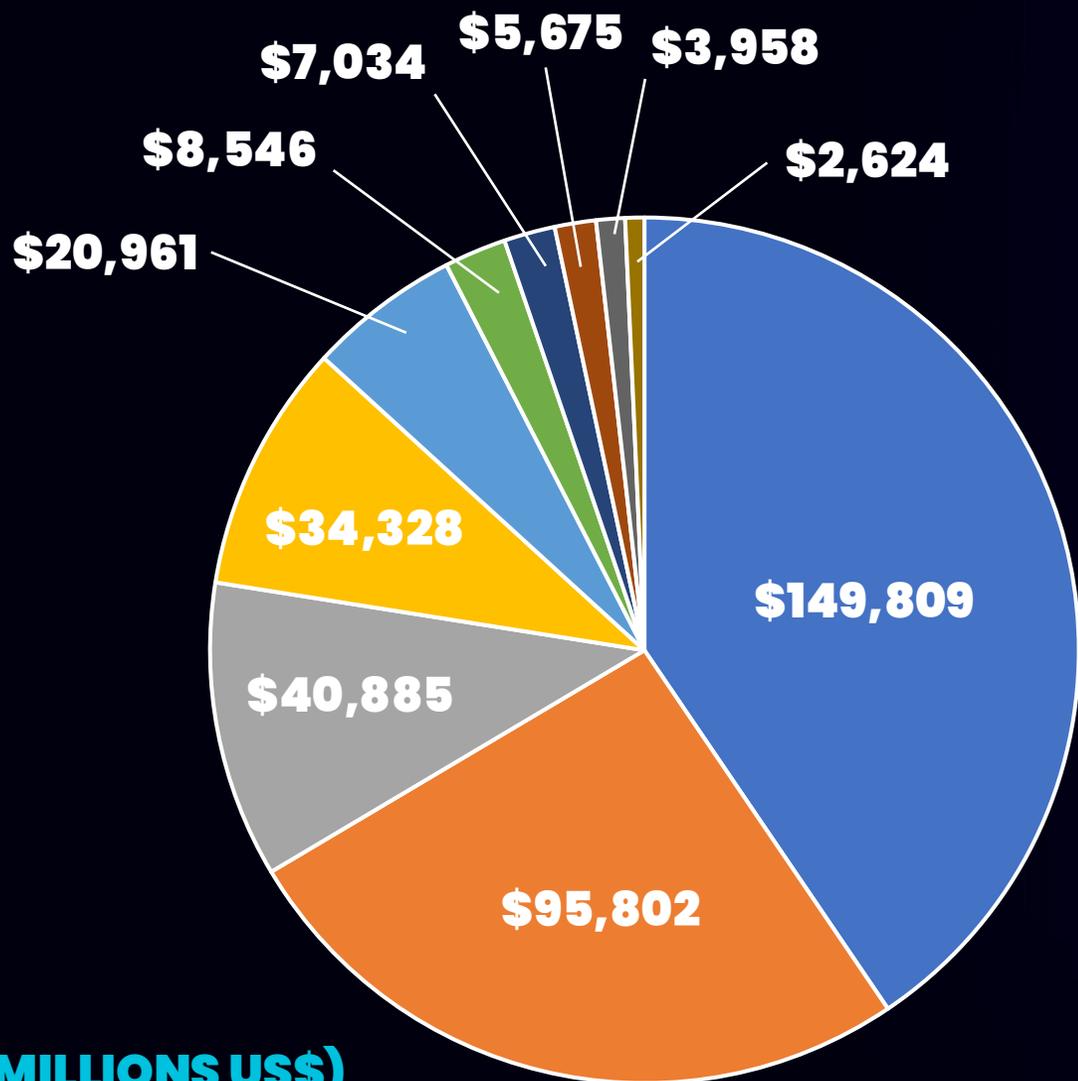
North Asia
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PAC**
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+6.8%

**TOTAL
WORLDWIDE**
\$369.6 Billion
+3.7%

LATAM
\$15.7 Billion
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GLOBAL SALES REVENUE BY PROPERTY TYPE



PROPERTY (GROWTH RATE)

- Character/Entertainment (+1.5%)
- Corporate/Brand (+6.1%)
- Sports (+3.6%)
- Fashion (+8.1%)
- Publishing (-0.06%)
- Collegiate (-2.5%)
- Celebrity (+8.8%)
- Music (+11.6%)
- Art (+7.4%)
- Non-Profit (+16.8%)

(IN MILLIONS US\$)

ENTERTAINMENT & CHARACTERS

\$149.8 B

+1.5%

Film & TV

43%

**Anime,
Gaming,
Social Media**

33%

ENTERTAINMENT & CHARACTERS

\$149.8 B
+1.5%

New
Properties
20%

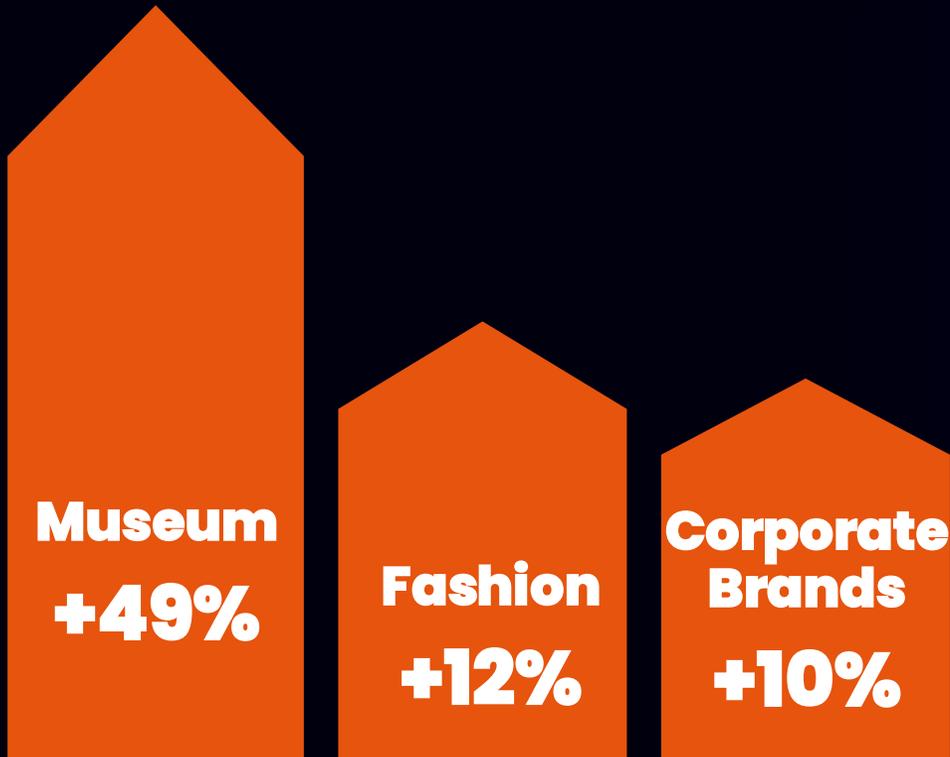
Classic &
Franchise
77%

53.9%

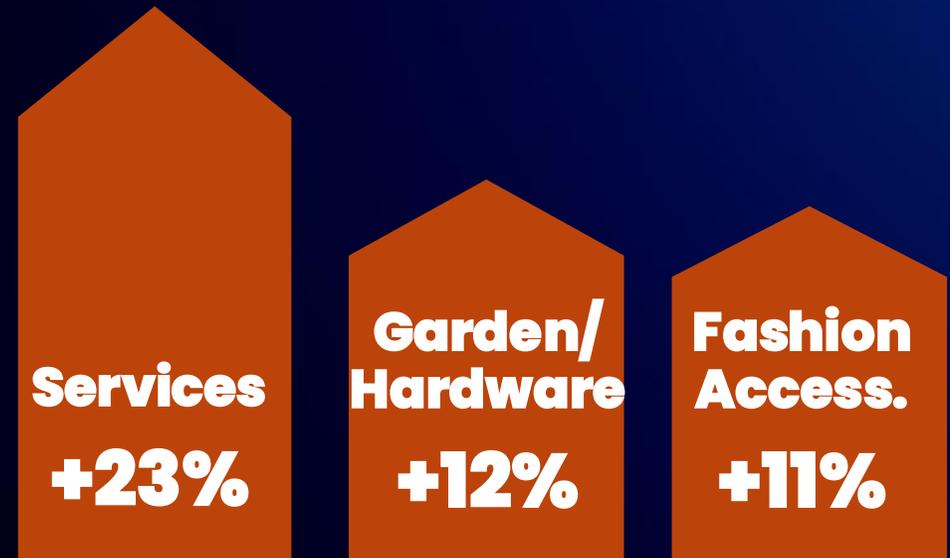
CHARACTER & ENTERTAINMENT

25.7%

CORPORATE BRANDS



Property Trends



Product Trends

EUROPE

**ENTERTAINMENT
& CHARACTER**

**CORPORATE
BRANDS**

FRANCE

43%

31%

GERMANY

49%

23%

ITALY

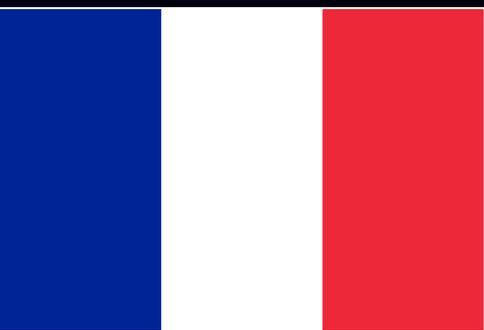
44%

25%

UK

62%

13%



\$7.9B

SALES AT RETAIL

+4.8%

GROWTH OVER 2023



Property Trends

Product Trends



\$13.9B

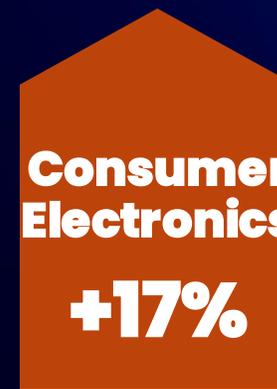
SALES AT RETAIL

+4.4%

GROWTH OVER 2023



Property Trends



Product Trends

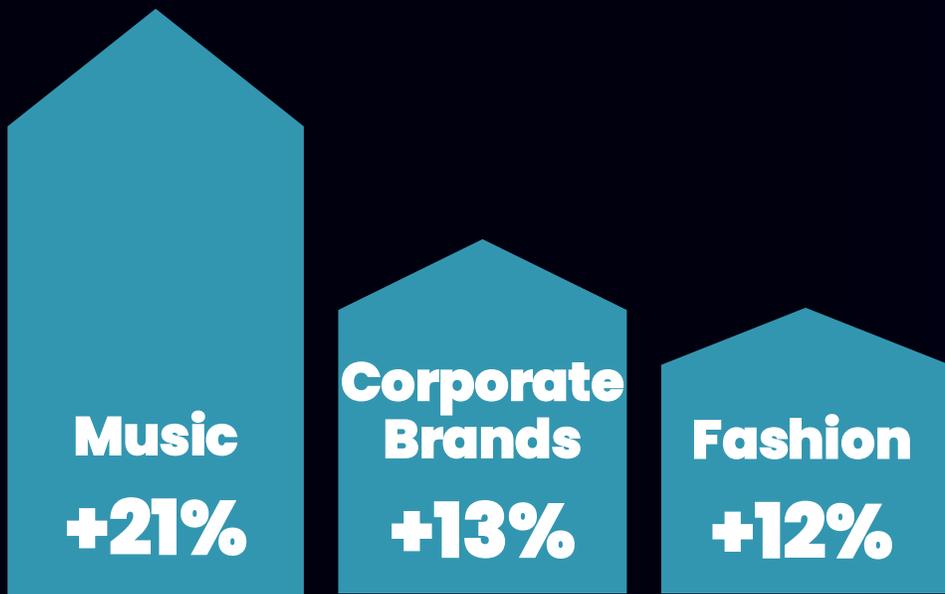


\$4.9B

SALES AT RETAIL

+2.2%

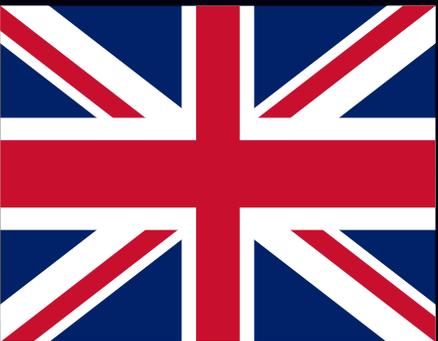
GROWTH OVER 2023



Property Trends



Product Trends

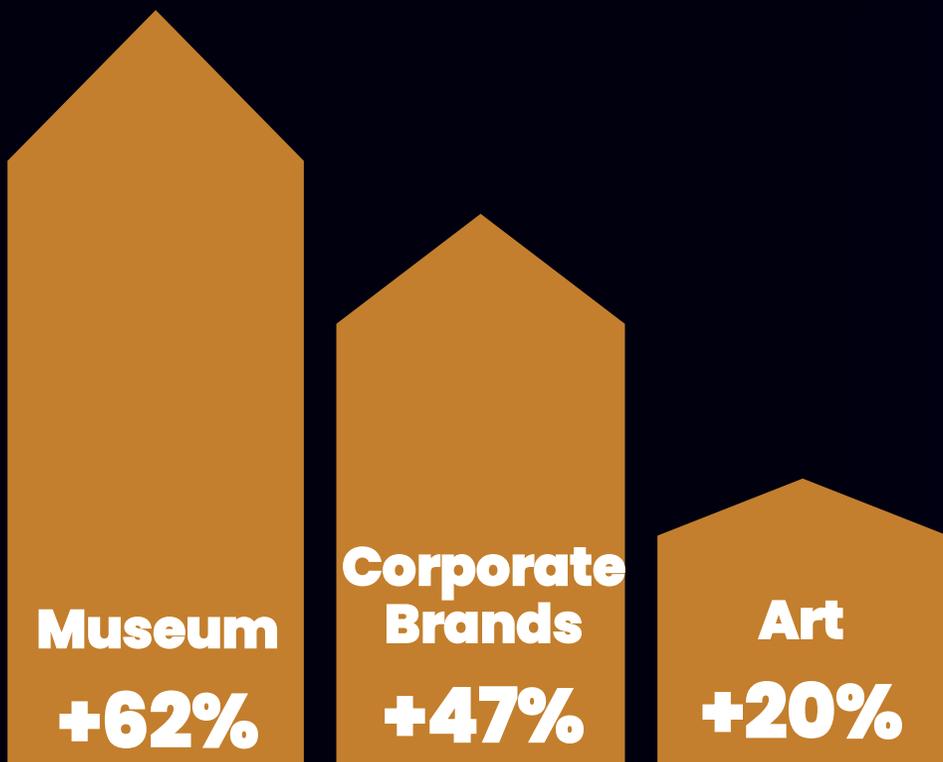


\$17.9B

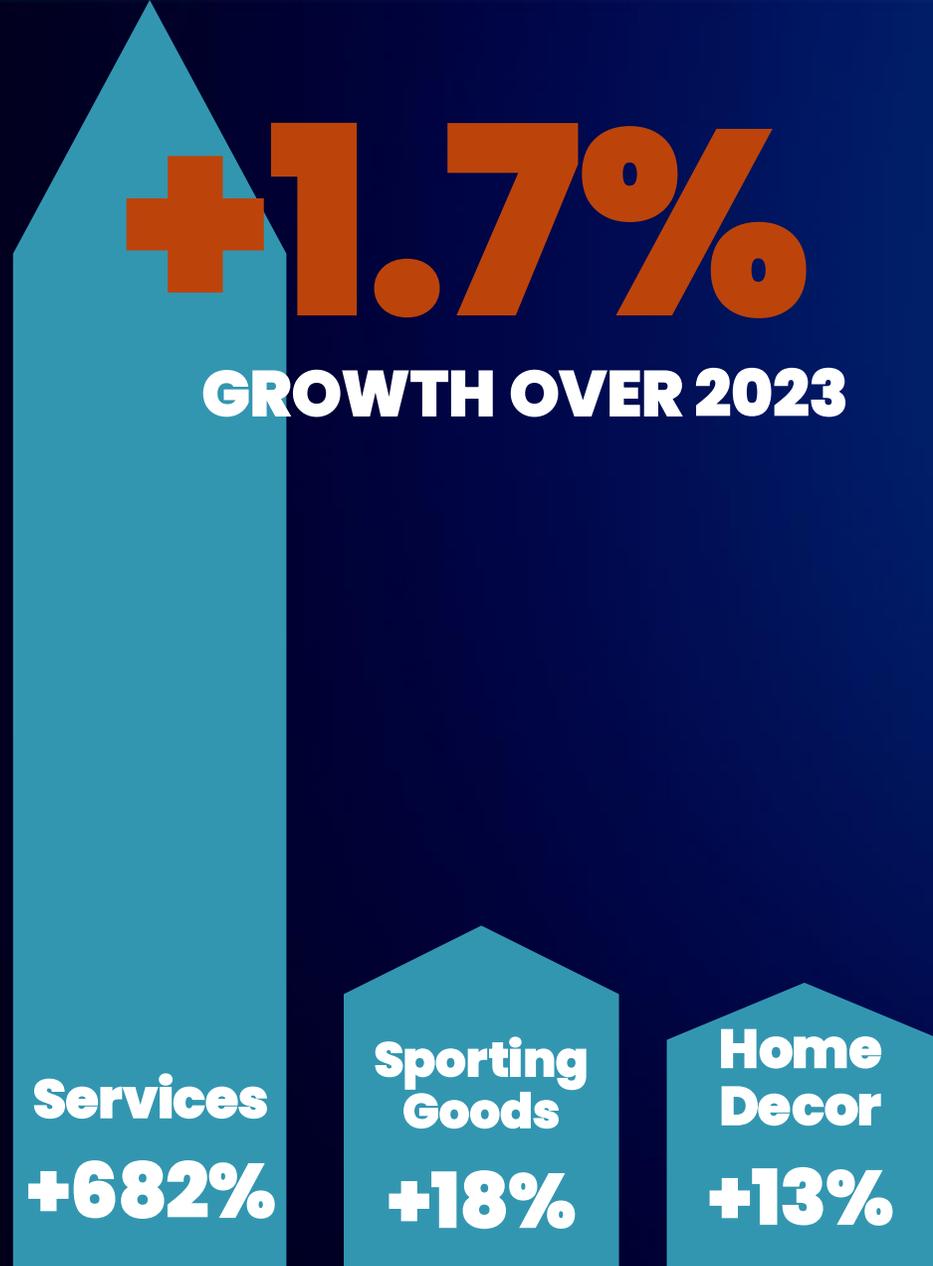
SALES AT RETAIL

+1.7%

GROWTH OVER 2023



Property Trends



Product Trends

KEY TAKEAWAYS

Significant Growth
across several Property Types

Continued diversification
of licensing across product categories

Specific territory
opportunities

New Target Group 50+
a generation with time & spending power



QUESTIONS

**EMPOWERING
BRAND
PARTNERSHIPS**



THANK YOU

**EMPOWERING
BRAND
PARTNERSHIPS**