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As global extension experts, we help leading brands, celebrities, media properties, manufacturers and retailers strengthen their relationships with consumers by creating breakthrough products and services. See what beanstalk can do for your business. Brand evolution awaits.

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Top Global Licensing Agents 2022

And more important, why do brands need one?

WITH MORE THAN $70 billion in retail sales numbers for respective clients, 2022's Top 20 Licensing Agents and the brands they represent are paving the way for what the consumer product landscape will look like in 2022, 2023 and for years to come.

License Global's Top Licensing Agents report examines the retail sales of the world's leading brand extension agencies, in addition to noting those notable "ones to watch," as well as breaks down the biggest agents by region and in granular detail.

The report showcases retail sales data for previous year financials as self-reported by each agency and is representative of global sales of licensed merchandise.

Of note this year, is IMG's dominance as the No. 1 Top Global Agent, reporting $14 billion (+$600 million year-on-year) in retail sales for its clients which include notable brands such as the Gap suite of brands, Chrysler, Cosmopolitan, Jeep, Juventus FC, "My Little Pony," 24 Hour Le Mans, MGM, SEGA, the Van Gough Museum and so many more. IMG has occupied this top spot since 2019.

Close on its heels is CAA-GBG, who reports $13 billion in retail sales for its clients, a $1 billion gain over 2021's sales disclosures.

Rounding out the top five are Beanstalk, LMCA and Global Icons.

Read on to learn more about each of these stellar agencies, trends in the space of consumer products, predictions from agency leaders and more.

* License Global consults various industry sources, financial documents, annual reports, et. al. and relies on the fiduciary responsibility of each company for accuracy. Figures, when necessary, have been converted to U.S. dollars using the exchange rate for Feb. 1, 2022.

What is a Licensing Agent?

Licensing agents are tapped to represent on a brand's behalf its marketable and extendable intellectual property. Licensing agents, in partnership with the licensor, will develop a scalable strategy and take the necessary steps to fulfill and implement the strategy by sourcing the right licensees and, in some cases, bring the product to market by brokering retailer deals.

Licensing agents are a brand's true partner and an entrusted colleague in bringing a company's most valued asset – its IP – to broader audiences.

Licensing agents have grown exceedingly more sophisticated since the early days of brand licensing, now often scaling their operations beyond the basic licensing categories such as apparel and accessories, toys and games or food and beverage, to tech-based categories like NFTs, video games and AR/VR, or through using advanced tactics like product collaborations to create buzz in the market or maybe even a viral sensation.

Licensing agents top-level goals are to:

- Build new relationships and strengthen those that may already exist, allowing a brand to fully realize its extendable opportunity.
- Enter into deal negotiations on a brand's behalf.
- Bring in-depth category expertise to brands looking to expand beyond their core.
- Identify market and category trends.
- Marry retailers and retail channels to a licensor's brand extension strategy.

"We have our pulse on the industry," says Steven Heller, president, The Brand Liaison, a leading licensing agency. "We understand the nuances of negotiating complex licensing deals, and we know how to avoid the pitfalls faced by many early-stage IP owners and manufacturers."

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TOO HOT TO HANDLE · PUR · playtex baby · Schick · Skintimate

Top 20 Global Licensing Agents

Rank	Agency	Retail Sales*	Key Clients/Brands
1	IMG	$14.6B	7Up, AAA, ABARTH, Alfa Romeo, "Angry Birds," ArmorAll, Arnold Palmer, AS Roma, "Assassin's Creed," Aston Martin, Aston Martin F1 Team, Baby Gap, Baker's, Banana Republic, Basil Hayden's, BB King, Becks (Europe), Been Trill, Bertucci's, Beyond Closet, Billboard, Booker's, Bravo! Italian Kitchen, Brigitte Bardot, Brio Italian Grille, British Army, FC Barcelona, Buca di Beppo, Budweiser (Europe), Bugatti, Bundesliga, Care Bears (Asia), Caesars Palace, Cheetos, Chevron, Chrysler, Collegiate Licensing Company, Corona (Europe), Cosmopolitan, Dee & Ricky, Delish, Discovery (Middle East), Dodge, Downton Abbey (Asia), Dolly Parton, Doritos, Ducati, Earl Enterprises, Earl of Sandwich, East India Company, Elvis Presley (Asia), Energizer, Esquire, "Fast & Furious" (Middle East), FC Internazionale, France Rugby Federation, Fiat 500, Fiat Professional, Football Greats Alliance (FGA), Fortnite, Gap, Gene Simmons, Gola, George Best, Goodyear, Haribo, Harper's Bazaar, Jackie Robinson Foundation, James B. Beam Distilling Co., Jeep, Jim Beam, Joyrich, Juventus FC, Kakao Friends, "Killing Eve," Kindi Kids (Middle East), Kirsch, Knob Creek, Lamborghini, Lancia, LAPD, Lay's, 24 Hour Le Mans, Leffe, Legent, Li Na, Like Nastya, Little Book, Luck, Marilyn Monroe (Asia), Manchester City (Asia), Maserati, Michael Jackson, Millie Bobby Brown/ Florence by Mills, Miss Universe, MGM (Asia), Mountain Dew, Monopoly (Middle East), M.V. Agusta, "My Little Pony" (Middle East), NBCUniversal (Middle East), National Lampoon, Nerf (Middle East), Newmoji (Middle East), NFL (international), Norman Rockwell, Normal People, "Peppa Pig" (Middle East), Pepsi, Pininfarina, "PJ Masks" (Middle East), Planet Hollywood, Play-Doh (Middle East), Professional Bull Riders, "Queer Eye," RAM, RAYOVAC, Red Arrows, Real Madrid (Asia), Refinery29, "Ricky Zoom," Rocket League, Royal Ascot, Royal Air Force, Royal Marines, Royal Navy, Royal & Ancient, Rovio "Angry Birds," Rugby World Cup 2023, Sega (Middle East), Shinola, Skydance Animation, Smiley (Australia), Stars On Ice, STP, Stella Artois, "Smurfs" (Middle East), Spellbound, "Sonic the Hedgehog" (Middle East), Superdry, Ted 2, TB12, Tempur +Sealy, "Tetris" (Asia & Europe), Toes on the Nose, Tokidoki (Asia), Tom Clancy's "Rainbow Six," Transformers (Middle East), UFC, Vail Resorts, Van Gogh Museum, Vilebrequin, Volkswagen, Walkers, Wayne Gretzky, World Rugby, World Trade Center, World's Strongest Man and Yamaha.
2	CAA-GBG	$13.1B	Coca-Cola, Playboy, Netflix, Peanuts, Minecraft, Riot Games ("League of Legends"), ABI (Budweiser), Bob Marley, The Cheesecake Factory, Jelly Belly, Beatrix Potter, Miffy, "Sesame Street," RedBull Racing, McLaren Automotive, Formula 1 and Jaguar Land Rover.
3	Beanstalk	$9.5B	Bush's Best, Cath Kidston, Chef Eric Adjepong, Diageo (Guinness, Baileys, Crown Royal, Captain Morgan, Smirnoff, Pimm's, Johnnie Walker, Roe & Co, Black and White, Bundaberg), Dinotopia, Dole, Godiva, Huddle House, Kellogg's (All Bran, Bear Naked, Cheez-It,Cocoa Krispies, Coco Pops, Miel Pops, Corn Flakes, Crunchy Nut, Eggo, Extra, Froot Loops, Frosted Flakes, Frosties, Incogmeato, Kashi, Krave, Tresor, Mini-Wheats, MorningStar Farms, Pringles, Pop-Tarts, Raisin Bran, Rice Krispies, Rice Krispies Treats Special K, RX Bar), Pennzoil, Perkins Bakery Co. P&G (Ace, Ariel, Bounty, Braun, Cascade, Charmin, Crest, Scope, Dash, Dawn, Downy, Dreft, Fairy, Febreze, Flash, Gain, Joy, Gillette, Lenor, Mr. Clean, Oral-B, Pampers, Puffs, Salvo, Tide, Vicks, Vidal Sassoon, ZzzQuil), Quaker State, Shell, Skullcandy, Stanley Black & Decker (Black & Decker, Craftsman, DeWalt, Facom, Mac Tools, Porter Cable, Stanley), U.S. Army, TGI Friday's, The Metropolitan Museum of Art, The Ohio State University, Travelocity, Volvo, Activision ("Call of Duty," "Crash Bandicoot," "Spyro," Activision Classics), ESL, Microsoft (Xbox, "Halo," "Sea of Thieves," "Ori," "Banjo-Kazooie," "Conker and Battletoads," "Rare;" Ubisoft: "Farcry" and "Just Dance") and Tell Me Why.
4	LMCA	$7.45B	HP, Westinghouse, Hobie, Sharper Image, Castrol, Compaq, Cummins, Odwalla, Fruit of the Loom, CleanBoss by Joy, Electrolux, AEG, Frigidaire, Zanussi, Weatherbeater, Dansko, Thomson, RCA, Roto-Rooter, Kodak, Emerson and Minolta.
5	Global Icons	$3.7B	Automobili Lamborghini, Aprilia, Benihana, Camp Beverly Hills, Citroen, Colgate-Palmolive, Dickey's Barbecue Pit, DS Automobile, Fleischer Studios & Betty Boop, Fred Segal, Hostess Snacks, Moto Guzzi, Opel, Piaggio, Pine Mountain, Polarfleece, Polartec, Royal Oak, Triumph Motorcycles, Turtle Wax, United States Postal Service, Vauxhall, Vespa, Voit and Vornado Air.
6	WildBrain CPLG	$3.4B	"Teletubbies," "Strawberry Shortcake," "Chip & Potato," "In the Night Garden," Peanuts Worldwide, ViacomCBS, MGM ("Pink Panther"), Sony Pictures (including "Ghostbusters"), emoji – The Iconic Brand, Spin Master, Hasbro and eOne, Dr.Seuss, Line Friends (including BT21 and Brawl Stars), SEGA, "Tetris," HarperCollins, World of Eric Carle, Motul, Sauber, Master Lock, Perfetti Van Melle, Kikkoman, Malibu, Absolut, European footballs clubs (including Arsenal FC, FC Barcelona and Paris Saint Germain), Harvard and Yale Universities, University of Southern California, Romero Britto and Authentic Brands Group.
7	Brand Central	$3B	Mars Wrigley, Kraft Heinz, Takis, Tapatio Hot Sauce, Fogo de Chao, Cap'n Crunch, "Mister Rogers Neighborhood," "Alma's Way," Edible, Simmons Mattress, Black Paper Party and Rube Goldberg.
8	The Joester Loria Group	$2.5B	McDonald's, PepsiCo, Frito-Lay, Constellation Brands, Ferrara Candy Company, Eric Carle, Papyrus, Kellogg's, Toyota and Lexus, Waste Management, Jack Links, We Wear Cute and Miffy.
9	CLC	$2.4B	CLC currently represents most of the nation's top colleges and universities, athletic conferences, bowls, the NCAA, College Football Playoff, and other top collegiate properties, as well as other global and scholastic brands.
10	Brandgenuity	$2.1B	BMW, Chuck E. Cheese, Church & Dwight (ARM & HAMMER, Vitafusion, OxiClean), Dr. Scholl's, Ed Stafford (Europe only), Edgewell Personal Care (Banana Boat, Hawaiian Tropic, Playtex Sport, Schick, Skintimate, Wet Ones), Kahlua, Kao (Jergens, John Freida), MINI, Mr. Kate, NFL Players Association (Europe only), Pnina Tornai, PUR, Sazerac (Buffalo Trace, Fireball, Myers's, Southern Comfort), Unilever (Europe only; Heartbrand ice creams, Marmite, Pot Noodle, Bovril) and White Castle.
11	USPA Global Licensing	$1.7B	U.S. Polo Assn. and Nantucket Whaler.
12	Guangzhou Art-land Holding Company Limited	$1.6B	Aimer Kids, Annil, Balabala, Belle, Chow Tai Fook, China Merchants Bank, CHOCOOLATE, DAZZLE, Dettol, Dencare, Deli stationery, E·LAND, Fila, Garden, Hewlett-Packard (HP), HLA, I.T, JD.com, KFC, Lativ, Milkground, Mark Fairwhale, Maxim's cakes, Nature's Bay, Only, Peacebird, Pinlive, POPMART, Paw in Paw, Rio, Skechers, Synear, Semir, STAYREAL, Shanghai Happy Valley, Unifree, Ulike, Wastons, Winner, Xiao Mi and more.
13	MDR Brand Management	$1.6B	Amy Winehouse, Elizabeth Arden, FIFA, The Hershey Company, Miffy, Moonbug, Paul Frank, Reese's and Revlon.
14	Broad Street Licensing Group	$1.2B	Subway Restaurants, Hard Rock Cafe, Farm Rich Foods, Old World Spices, Sea Pak Seafoods, Tony Roma's Restaurants, Rich Foods and BIC USA.
15	The Brand Liaison	$1B	The Comfy, Bearpaw, FUBU, Gloria Vanderbilt, Laura Ashley, Tokyodachi, Hoonigan, "Ninja Life Hacks," Exersaucer, Debra Messing, Daymond John, Robert Irvine, David Tutera, Christopher Knight and more
16	Rights & Brands	$865M	"Moomin," Tove Jansson, Astrid Lindgren and Ilon Wikland, Mauri Kunnas, Stig Lindberg, Carl and Karin Larsson, Marius of Norway, PURENorway, Fiskars Group, H&M, Fazer, Rovio Entertainment, Zaini, Cath Kidston, TCC, LPP SA, Makia, Layered, Finlayson, Sarpaneva Watches and Nordicbuddies.
17	Seltzer Licensing Group	$850M	Unilever, NBC, Scotts Miracle-Gro, American Red Cross, Airheads, Campbell's Soup, Rust-Oleum, Walter Geoffrey Harvest Hill, Koala Kare and Checkers/Rallys.
18	Retail Monster	$800M	Bravado, Crayola, Copyrights, CyberGroup Studios, Electronic Arts, emoji, Gearbox Software, Herschend Media, Hasbro, The HUT Group, Mattel (U.K.), "Minecraft," Moonbug, 9 Story Media Group, Redbubble, SEGA (U.K.), Slumberkins, Surprise Drinks, Sutikki, SYBO Games, Toon2Tango, Townley, Vlad & Niki and Youtooz.
19	Global Trademark Licensing	$750M	Jaguar Land Rover, Mercedes-Benz, Lotus Cars, Scania Trucks, McLaren Racing, Pagani Automobili and London Taxi Crossfire.
20	IMC Licensing	$706.5M	Does not disclose client list.

Ones to Watch

Rank	Agency	Retail Sales*	Key Clients/Brands
21	VIZ Media	$570M	TV Tokyo, Warner Japan, ShoPro, Shueisha and others.
22	Redibra	$523M	Coca-Cola, Netflix, Nintendo, General Motors, Cloudco, Moonbug, Now United, Luccas Neto and Galinha Pintadinha.
23	TSG Brands	$500M	HEAD, New Balance, Everlast, Starter, Eddie Bauer, IZOD, BCBG, Steve Madden, Ann Klein, Perry Ellis and more.
24	Super Femina Entertainment	$500M	Does not disclose client list.
25	Artestar	$400M	Keith Haring, Jean-Michel Basquiat, Robert Mapplethorpe, Kenny Scharf, Herb Ritts, Tom Wesselmann, James Rosenquist, Maripol and Gary Baseman.
26	Licensing Street	$400M	SEGA, Laika, ABC Mouse, Fred Rogers Productions, Magic Light Pictures and Kidz Bop.
27	United Talent Agency	$400M	"CoComelon," Blippi and Lauren Conrad.
28	Alifish	$380M	Burberry, L'Oreal, Häagen-Dazs, Johnson & Johnson, LAMY, Razer, SPALDING, NESTLE, adidas, OPPO, LOCK&LOCK and more.
29	Bulldog Licensing	$327M	"Sesame Street," "Care Bears," EA, "Miraculous," Magic Mixies, "That's not my...," Match Attax, "Odo" and "Popeye."
30	Brand Licensing Team	$300M	General Mills, Molson Coors, Cold Stone, Moose Tracks and Focus Brands.
31	Evolution USA	$300M	MGM Studios, Gaumont Television, Pressman Films, Morgan Creek, Meredith Corporation, Dali Universe, Patricia Nash Designs, Nelly, Ella Fitzgerald Estate, The Hollywood Chamber of Commerce, Activision, System Era Softworks, Tiny Build Games, OLO Industries, Just Play Toys and Yoga Dogs & Cats.
32	Lisa Marks Associates	$258M	The Bazooka Companies, PEZ, Spangler Candy Company, Chattanooga Bakery, Perfetti Van Melle, Smithsonian Institution, Jel Sert, Smarties Candy Company, Impact Confections, Lionel, Fun Sweets, Avanti Press, Bosco Products, Benton Arts, Mr. Christmas and Inconceivable Studios.
33	Striker Entertainment	$250M	Scottgames, AMC Studios, Alcon Entertainment, Media Rights Capital and WonderStorm.
34	Joy Brands	$200M	Havanna, Mooving, Desko, Beter Day Books, Yelmo, Card.com, Leanin Tree, Paper House, Coppel, Tregar and more.
35	Jewel Branding & Licensing	$200M	New York Botanical Garden, Frank Lloyd Wright Foundation, Rachael Hale, National Wildlife Federation, Plum Pretty Sugar, EttaVee, Bouffants & Broken Hearts, Mia Charro, Nikki Chu, Simplified, Lolita and CatCoq.
36	La Panaderia Licensing & Marketing	$150M	Hasbro, Netflix, Sesame Workshop, Toei Animation and BBC.
37	Maurizio Distefano The Evolution of Licensing	$137M	"Masha e Orso," "Bing," "Bluey," "CoComelon," Blippi, Morphle, Little Baby Bum, "Gigantosaurus," "ALVINNN!!! and the Chipmunks," Leo e Tig, Charlotte M., Kids Vet Academy, Asterix, Gapchinska, Hamsta, Baileys, Guinness, Cup of Therapy, ISA (International Space Archives), La Gazzetta dello Sport, LIFE, Corto Maltese, PREMOLI+DI BELLA, Filippo Laterza e Stefano Cavalleri, Motörhead, Iron Maiden, Slayer, Backstreet Boys, Whitney Houston, Britney Spears, AC/DC, David Bowie, KISS, Pink Floyd, The Police, Woodstock, John Lennon Imagine, Lennon & McCartney Lyrics, Genesis, Janis Joplin and Miles Davis.
38	MHS Licensing & Consulting	$130M	The Hautman Brothers, Abraham Hunter, Stephanie Ryan, Al Agnew, Amylee Weeks, Buck Wear and Jetty Home.
39	The Valen Group	$130M	Red Robin Gourmet Burgers, Tree Top, The Paleo Diet, Beyond Green and Menchies.
40	Creative Licensing	$125M	Studiocanal, Compass Films and Revolution Studios.

Top Agents
(by Headquarters)

Top 5 U.K. Agents

Rank	Agency	Retail Sales*	Key Clients/Brands
1	WildBrain CPLG	$3.4B	"Teletubbies," "Strawberry Shortcake," "Chip & Potato," "In the Night Garden," Peanuts Worldwide, ViacomCBS, MGM ("Pink Panther"), Sony Pictures (including "Ghostbusters"), emoji – The Iconic Brand, Spin Master, Hasbro and eOne, Dr.Seuss, Line Friends (including BT21 and Brawl Stars), SEGA, "Tetris," HarperCollins, World of Eric Carle, Motul, Sauber, Master Lock, Perfetti Van Melle, Kikkoman, Malibu, Absolut, European footballs clubs (including Arsenal FC, FC Barcelona and Paris Saint Germain), Harvard and Yale Universities, University of Southern California, Romero Britto and Authentic Brands Group.
2	MDR Brand Management	$1.6B	Amy Winehouse, Elizabeth Arden, FIFA, The Hershey Company, Miffy, Moonbug, Paul Frank, Reese's and Revlon.
3	Bulldog Licensing	$327M	"Sesame Street," "Care Bears," EA, "Miraculous," Magic Mixies, "That's not my...," Match Attax, "Odo" and "Popeye."
4	Rocket Licensing	$327M	Beano Studios, ESA, Legendary Entertainment, MGM, Scholastic, The World of Eric Carle (Penguin Random House) and Toho Company.
5	The Point.1888	$20M	Moonbug, Abbey Road, Barratt, Battersea, Ben Eine, Emily Burningham, Flipout, I Like Birds, Jimbobart, British & Irish Lions, Missprint, Molang, Moomin, Mumsnet, Moulin Rouge, Moon & Me, Official Charts, Percy the Park Keeper, The Raccoons, Rachel Ellen, Real Hackney Dave, Samaritans, Tom Gates, St. Andrews Links, Team GB, Cambridge University and Williams Racing.

Top 5 European Agents

Rank	Agency	Retail Sales*	Key Clients/Brands
1	Rights & Brands	$865M	"Moomin," Tove Jansson, Astrid Lindgren and Ilon Wikland, Mauri Kunnas, Stig Lindberg, Carl & Karin Larsson, Marius of Norway, PURENorway, Fiskars Group, H&M, Fazer, Rovio Entertainment, Zaini, Cath Kidston, TCC, LPP SA, Makia, Layered, Finlayson, Sarpaneva Watches and Nordicbuddies.
2	Maurizio Distefano The Evolution of Licensing	$137M	"Masha e Orso," "Bing," "Bluey," "CoComelon," Blippi, Morphle, Little Baby Bum "Gigantosaurus," "ALVINNN!!! and the Chipmunks," Leo e Tig, Charlotte M., Kids Vet Academy, Asterix, Gapchinska, Hamsta, Baileys, Guinness, Cup of Therapy, ISA (International Space Archives), La Gazzetta dello Sport, LIFE, Corto Maltese, PREMOLI+DI BELLA, Filippo Laterza e Stefano Cavalleri, Motörhead, Iron Maiden, Slayer, Backstreet Boys, Whitney Houston, Britney Spears, AC/DC, David Bowie, KISS, Pink Floyd, The Police, Woodstock, John Lennon Imagine, Lennon & McCartney Lyrics, Genesis, Janis Joplin and Miles Davis.
3	Pure Brands	$50M	Burberry, L'Oreal, Häagen-Dazs, Johnson & Johnson, LAMY, Razer, SPALDING, NESTLE, adidas, OPPO, LOCK&LOCK and more.
4	Caravanserai Partners	$10M	King Features, Mercis, Sogex, LMI, Penguin Ventures, Vulli, Chefclub and Team Heretics.
5	Edebé Licensing	$10M	Santoro, Catalina Estrada, Lara Costafreda, Yoga Dogs & Yoga Cats, Kawanimals, Hello Maestro, Paddington Bear, Brigitte Bardot and Dakar.

Top 5 U.S. Agents

Rank	Agency	Retail Sales*	Key Clients/Brands
1	IMG	$14.6B	7Up, AAA, ABARTH, Alfa Romeo, "Angry Birds," ArmorAll, Arnold Palmer, AS Roma, "Assassin's Creed," Aston Martin, Aston Martin F1 Team, Baby Gap, Baker's, Banana Republic, Basil Hayden's, BB King, Becks (Europe), Been Trill, Bertucci's, Beyond Closet, Billboard, Booker's, Bravo! Italian Kitchen, Brigitte Bardot, Brio Italian Grille, British Army, FC Barcelona, Buca di Beppo, Budweiser (Europe), Bugatti, Bundesliga, Care Bears (Asia), Caesars Palace, Cheetos, Chevron, Chrysler, Collegiate Licensing Company, Corona (Europe), Cosmopolitan, Dee & Ricky, Delish, Discovery (Middle East), Dodge, Downton Abbey (Asia), Dolly Parton, Doritos, Ducati, Earl Enterprises, Earl of Sandwich, East India Company, Elvis Presley (Asia), Energizer, Esquire, "Fast & Furious" (Middle East), FC Internazionale, France Rugby Federation, Fiat 500, Fiat Professional, Football Greats Alliance (FGA), Fortnite, Gap, Gene Simmons, Gola, George Best, Goodyear, Haribo, Harper's Bazaar, Jackie Robinson Foundation, James B. Beam Distilling Co., Jeep, Jim Beam, Joyrich, Juventus FC, Kakao Friends, "Killing Eve," Kindi Kids (Middle East), Kirsch, Knob Creek, Lamborghini, Lancia, LAPD, Lay's, 24 Hour Le Mans, Leffe, Legent, Li Na, Like Nastya, Little Book, Luck, Marilyn Monroe (Asia), Manchester City (Asia), Maserati, Michael Jackson, Millie Bobby Brown/Florence by Mills, Miss Universe, MGM (Asia), Mountain Dew, Monopoly (Middle East), M.V. Agusta, "My Little Pony" (Middle East), NBCUniversal (Middle East), National Lampoon, Nerf (Middle East), Newmoji (Middle East), NFL (international), Norman Rockwell, Normal People, "Peppa Pig" (Middle East), Pepsi, Pininfarina, "PJ Masks" (Middle East), Planet Hollywood, Play-Doh (Middle East), Professional Bull Riders, "Queer Eye," RAM, RAYOVAC, Red Arrows, Real Madrid (Asia), Refinery29, "Ricky Zoom," Rocket League, Royal Ascot, Royal Air Force, Royal Marines, Royal Navy, Royal & Ancient, Rovio "Angry Birds," Rugby World Cup 2023, Sega (Middle East), Shinola, Skydance Animation, Smiley (Australia), Stars On Ice, STP, Stella Artois, "Smurfs" (Middle East), Spellbound, "Sonic the Hedgehog" (Middle East), Superdry, Ted 2, TB12, Tempur +Sealy, "Tetris" (Asia & Europe), Toes on the Nose, Tokidoki (Asia), Tom Clancy's "Rainbow Six," Transformers (Middle East), UFC, Vail Resorts, Van Gogh Museum, Vilebrequin, Volkswagen, Walkers, Wayne Gretzky, World Rugby, World Trade Center, World's Strongest Man and Yamaha.
2	CAA-GBG	$13.1B	Coca-Cola, Playboy, Netflix, Peanuts, Minecraft, Riot Games ("League of Legends"), ABI (Budweiser), Bob Marley, The Cheesecake Factory, Jelly Belly, Beatrix Potter, Miffy, "Sesame Street," RedBull Racing, McLaren Automotive, Formula 1 and Jaguar Land Rover.
3	Beanstalk	$9.5B	Bush's Best, Cath Kidston, Chef Eric Adjepong, Diageo (Guinness, Baileys, Crown Royal, Captain Morgan, Smirnoff, Pimm's, Johnnie Walker, Roe & Co, Black and White, Bundaberg), Dinotopia, Dole, Godiva, Huddle House, Kellogg's (All Bran, Bear Naked, Cheez-It,Cocoa Krispies, Coco Pops, Miel Pops, Corn Flakes, Crunchy Nut, Eggo, Extra, Froot Loops, Frosted Flakes, Frosties, Incogmeato, Kashi, Krave, Tresor, Mini-Wheats, MorningStar Farms, Pringles, Pop-Tarts, Raisin Bran, Rice Krispies, Rice Krispies Treats Special K, RX Bar), Pennzoil, Perkins Bakery Co. P&G (Ace, Ariel, Bounty, Braun, Cascade, Charmin, Crest, Scope, Dash, Dawn, Downy, Dreft, Fairy, Febreze, Flash, Gain, Joy, Gillette, Lenor, Mr. Clean, Oral-B, Pampers, Puffs, Salvo, Tide, Vicks, Vidal Sassoon, ZzzQuil), Quaker State, Shell, Skullcandy, Stanley Black & Decker (Black & Decker, Craftsman, DeWalt, Facom, Mac Tools, Porter Cable, Stanley), U.S. Army, TGI Friday's, The Metropolitan Museum of Art, The Ohio State University, Travelocity, Volvo, Activision ("Call of Duty," "Crash Bandicoot," "Spyro," Activision Classics), ESL, Microsoft (Xbox, "Halo," "Sea of Thieves," "Ori," "Banjo-Kazooie," "Conker and Battletoads," "Rare;" Ubisoft: "Farcry" and "Just Dance") and Tell Me Why.
4	LMCA	$7.45B	HP, Westinghouse, Hobie, Sharper Image, Castrol, Compaq, Cummins, Odwalla, Fruit of the Loom, CleanBoss by Joy, Electrolux, AEG, Frigidaire, Zanussi, Weatherbeater, Dansko, Thomson, RCA, Roto-Rooter, Kodak, Emerson and Minolta.
5	Global Icons	$3.7B	Automobili Lamborghini, Aprilia, Benihana, Camp Beverly Hills, Citroen, Colgate-Palmolive, Dickey's Barbecue Pit, DS Automobile, Fleischer Studios & Betty Boop, Fred Segal, Hostess Snacks, Moto Guzzi, Opel, Piaggio, Pine Mountain, Polarfleece, Polartec, Royal Oak, Triumph Motorcycles, Turtle Wax, United States Postal Service, Vauxhall, Vespa, Voit and Vornado Air..

The Top Countries
(by Agency Revenue)

North America

Total Top 20 Value:	$35.57B
Total Top 40 Value:	$40.03B
Total Firms' Value:	$40.63B

United Kingdom

Total Top 20 Value:	$33.45B
Total Top 40 Revenue:	$33.78B
Total Revenue of Participating Agents:	$33.86B

Europe

Total Top 20 Value:	$865M
Total Top 40 Value:	$1B
Total Firms' Value:	$1.08B
Total Firms' Value (including the UK):	$34.92B

India

Total Top 20 Value:	—
Total Top 40 Value:	—
Total Firms' Value:	$118M

China

Total Top 20 Value:	$1.6B
Total Top 40 Value:	$1.98B
Total Firms' Value:	$1.98B

South America

Total Top 20 Value:	—
Total Top 40 Value:	$873M
Total Firms' Value:	$963M

Worldwide

Total Global Top Agents Value:	$71.48B
Total Ones to Watch Value:	$7.65B
Total Global Firms' Value:	$78.67B

***THE TOP AGENTS** list is based on individually submitted agency data, specifically the revenue generated at retail of licensed goods for each firm's client base. The geographical breakdown of Top Agents takes each agent's submitted revenue data and generates a total retail sales value for each country based on the headquarters of submitted firms.

Insights from The Licensing Agents

UNITED STATES

BRAND CENTRAL

ROSS MISHER, CHIEF EXECUTIVE OFFICER, BRAND CENTRAL

Trend Spotting in the U.S.

As an agency rooted in pop culture and trends, we closely follow consumer, retail and licensing trends. Here are a few we are following right now.

Food is King

We are seeing a big emphasis on food and beverage licensing as one of the fastest-growing segments in the licensing industry. From throwback '90s nostalgia to collabs with fast-food chains and popular influencers, the world of food and beverage licensing is very dynamic right now. Brand Central has been fortunate to represent many of the top CPG brands, from Mars Wrigley and Kraft Heinz to Takis and Tapatio. We have put together incredible long-term strategic food and beverage partnerships as well as lots of buzzy collabs, especially in fashion and beauty categories.

COVID-19 Shifts Behavior

COVID has caused shifts in consumer behaviors, and the new behaviors are becoming established routines, especially in younger demos. A good example is the rise of food delivery, with 26% of Americans ordering take-out or delivery every week. The Ghost Kitchen space is skyrocketing, and we are entering this space with our clients in a significant way. Consumers feel adventurous about food right now and want to explore new flavors, restaurants, new dishes and try the things they see going viral on TikTok.

To Infinity and Beyond

We all know NFTs and the metaverse are exploding right now. We are currently working with the largest company (Virtual Brands Group) to acquire licenses to build metaverse experiences in "Roblox." We believe brands must have a metaverse strategy in place or be left behind. NFTs like Bored Ape have seen a big surge in popularity and have become the new hot space for licensing IPs. This is an exciting space to explore for consumer products, especially with "phygital" elements that allow the user to physically show off their digital purchase, like Casetify NFT cases.

We Love Our Pets

Pet licensing is also a space we've had our eye on as its popularity continues to grow. There are tons of new partnerships and products in the market like Hasbro's dog toys, Petco x Lowe's store-in-store concept and Chewy's Disney dog toys. Millions of people added pets to their households during the pandemic, so demand for pet products is exceptionally high right now.

Expect the Unexpected

Consumers love unexpected brand collaborations, and the trend is getting even more wacky and fun. Our agency has become experts in building strategic collaborations like PUMA x Kool-Aid, Oreo x Champion, Mister Rogers x Primitive Skateboards, to name a few. This limited-edition "drop" method is still working for shoppers right now. The more unexpected, the better, and there is a "mini drop" trend with extremely low quantities only available online to stir up cultural conversations. For example, the Oscar Mayer Bologna face masks sold out in minutes!

The Changing Licensing Landscape

The licensing business has been impacted by global issues more than ever. We are all connected in the global economy, from the pandemic to global supply chain issues. From an IP perspective, we see a shift to more corporate brands vs. entertainment brands. Global corporate, food and automotive brands are on the rise as consumers outside the U.S. adopt non-entertainment merchandise. People are also loving a mix of international content right now, demonstrated by the

global success of Netflix's "Squid Game." Entertainment licensing is shifting from movies to streaming platforms, and unless you have a big catalog of anime or gaming, Gen Z-ers everywhere may tune out.

Keeping Ahead of the Curve

We have always been one step ahead of what is happening in culture, from creating the first retail collab with Kitson x Archie in 2005 to representing gamers and influencers before it was a trend. Ten years ago, we were the first agency to build an in-house trend intelligence service called Brand Central Insights. Our team of trend spotters investigate every category, industry and pop culture movement to keep our clients and products relevant in everything we do. From large national media companies to the top retailers, we provide customized, curated trend intelligence from these organizations, and we leverage that data for our brand extension and manufacturer representation clients.

Agency Challenges in 2022

We are an industry that thrives on building relationships, but with COVID, there have been limited trade shows and less face-to-face networking. Supply chain issues have also made creating and delivering new products difficult and have pushed back deals and product launches. Some licensees have been hesitant to take on new licenses to focus on their core business, and retailers are increasingly focused on building their private brands vs. licensed brands. In addition, retailers are also very focused on keeping core products on the shelf and are less inclined to bring in new products now. That said, as an industry, we have persevered and are overcoming these obstacles.

UNITED KINGDOM

The POINT. 1888

BETHAN GARTON, CHIEF COMMERCIAL OFFICER, THE POINT.1888

Trend Spotting in the U.K.

There are a few trends that we've seen over the past few months, from digital content to subscription boxes and, of course, sustainability. Sustainability quite rightly is at the top of everyone's list, but it's only a trend now in specific categories. For example, plush toys produced by preferred retail suppliers are almost all made from recycled materials, but for categories like fashion or even NFTs – sustainability still has some way to go and is very much part of all conversations.

We have also seen the explosion of digital trends with NFTs and the rise of the metaverse. The digital universe is here to stay, and it's going to be fascinating to witness brands explore these spaces. It won't be suitable for everyone, but there will be the opportunity to see brands enter and thrive or enter and quickly leave the space.

A fascinating trend is consumers clamoring for ways to "make, do, mend," buying quality over quantity and being able to repair and mend their products, whether it's clothing or toys. We hope this trend becomes more of a norm. You only have to look at YouTube or Instagram to see thousands of content creators looking to repurpose, repair or clean things to give new life to a product.

Wellness is very much on the retail agenda. With digital products encouraging us to all look after our mental health and home products such as weighted blankets for a better night's sleep and so many others, the space at retail for wellness products is sure to grow and grow.

The primary trend we continue to see is the dominance of digital content as Netflix, YouTube and Amazon battle for consumers' views. Brands such as "CoComelon," "Super Sema," "Blippi" and "Morphle" would not have the reach they have if it weren't for some of these digital viewing platforms. Retailers understand the power of this now.

In terms of activity at retail, there is a revival into experiential retail post-pandemic and finding ways to get people into shops. This is being promoted by retailers, brands and commercial property owners as they look to utilize open space due to the impact of COVID. Shopping center landlords are looking at licensing to convert empty stores into experiential shopping opportunities; they no longer rely on the retailers alone for retail experiences.

The Changing Licensing Landscape

The world has become smaller and more accessible due to the COVID pandemic. Digital brands have been allowed to scale and grow internationally with ease. This has allowed brands to become more accessible and see demand for licensed products grow across the globe. For example, we managed to sign 13 sub-agents in the space of eight weeks for our brands, due to the popularity of the brand but also the ability to work digitally – this would, pre-pandemic, have taken much longer as the trend pre-pandemic was to meet face-to-face. There needs to be a balance between digital and face-to-face meetings. Humans by nature are sociable, particularly in the licensing industry, and it's now about striking the right balance. Trade shows are back, and COVID has made us as a business look at ways to improve our presence at all events – we want all interactions to be as meaningful as possible, whether that be a wellness walk with a colleague or a meeting at a trade show.

We are also seeing many new brands decide that now is the time to try licensing, which previously hadn't. Whether it's brands looking to make up the shortfall of the pandemic or using licensing as a route to market, it'll be interesting to see which brands grab the opportunity to explore something new.

Keeping Ahead of the Curve

At The Point.1888, we pride ourselves on our retail first proposition; this is done through a massive effort to establish relationships with retailers and understand their needs and wants. We then utilize the brands that we represent to offer them solutions. All of this is about strong, honest, communicative relationships, allowing us to be in market quickly and effectively.

Agency Challenges in 2022

The industry is dealing with the effects of supply chain issues, making the world more expensive. Many of these issues are out of our control, which is why the industry and retailers need to work together and support each other. Another challenge is to find properties that have a genuine reason for being in licensing and creating products that consumers want. As storytellers, it's important to create authentic products that matter and allow a brand to tell authentic stories.

FRANCE



LICENCES

TATIANA RIVIÈRE-CHERQUI, DEPUTY DIRECTOR, TF1 LICENSES

Trend Spotting in France

Sustainability and CSR (Corporate Social Responsibility) are important trends at every stage: from companies who adapt their production process, offer and communication to consumers who are increasingly aware and concerned about those topics. This applies to environmental matters (material sourcing, recycling and carbon footprint) and societal issues that impact the way brands act towards working conditions and human-related issues. It also impacts the way brands communicate and the values they want to promote (female empowerment, body positivity, non-gender toys).

Another big trend would be digital. Digital consumption of products and content has grown significantly, even more during the lockdowns. It applies to the way people buy goods (through retailers' online stores, through services of live shopping) and the kind and quantity of content we have access to (podcast, streaming, gaming). Among all digital content, for instance, NFTs are growing and becoming a not-to-be-missed topic, offering great perspectives in business and marketing activations for brands. Of course, as a brand owner and representative, we are actively looking into this.

Of course, those global and European trends are observed in France. For instance, regarding the adoption of more responsible consumption habits, this concern is strong in France, and increased with the COVID-19 crisis. This is illustrated by an increasing interest in sustainable products and consumption more quality-centric over quantity.

French consumers are increasingly sensitive to local products, traceability and short circuits. The "Made in France" label is an essential criterion for the purchasing activity of a significant part of the French people. With our licensees whose products are made in France, this is an exciting communication topic, and licenses that share common values are a good part of the mix. Social media also has a significant impact on French consumers, especially when it comes to cooking, beauty products and fashion. They tend to consider the opinions and feedback of other French users, and a significant part of French users on the internet tend to follow influencer purchasing advice. This has an impact on the way licenses can work with influencers.

The Changing Licensing Landscape

During the COVID crisis, we observed that licensed products were doing much better than regular ones. It is a reassuring element and a safe investment because of consumers' attachment to it. In addition to this, we also observe a need for nostalgia. When it comes to entertainment, people are primarily looking for strong brands that appeal to better/easier times – generally, entertaining brands that they used to enjoy when they were younger or kids. It is also the opportunity for the brands to touch new consumers who are not familiar with the brands yet. A license is a reliable way for an advertiser/industrial to benefit from a strong attraction towards its targets and to associate itself to the brand's values using the license. Furthermore, more licensees are developing live experiences. This is the case of our first indoor park completely branded with our youth umbrella television brand TFOU and its mascots, the Hoofs, or the escape games inspired by popular television shows such as the "Koh Lanta" ("Survivor") escape game.

Keeping Ahead of the Curve

In addition to watching the market constantly, we also benefit from TF1's innovation team of experts. They aim at detecting significant tendencies and technological innovations.

Our mission is to develop and bring out the TF1 Group's brands: our leading entertainment and fictional programs ("The Voice," "Camping Paradis" and "Koh-Lanta"), our animated series ("Barbapapa," "Miraculous" and "The Smurfs") but also digital brands belonging to the group and brands from our daily news broadcast.

Our upcoming developments in 2022 and years after will follow the purpose of reinforcing consumer products development, continuing and developing under promotional license brand content operations and going further and faster on Live Experience development.

GERMANY

PURE BRANDS

JURGEN HALDER, FOUNDER, CHIEF EXECUTIVE OFFICER, PURE BRANDS

Trend Spotting in Germany

Thinking about Europe, the main changes that we observe are:

- Purchases in many categories are migrating from offline to online channels
- Investors are slashing costs and ushering in a new wave of consolidation
- Governments are imposing stricter regulations on CPG (Consumer Product Goods) manufacturers.

Companies must reinvent themselves if they are to survive and thrive. As consumer needs and shopping habits become increasingly polarized, manufacturers will need to decide which consumer segments to serve, whether to make branded goods, private-label products or both and which retail channels to prioritize.

In the future, companies will have to create additional value through innovations and cost reductions. We observe that the growth niches are increasingly fragmented. We see a big trend to health and wellness products and for cross-channel shopping, vertical integration and an apparent increase of digitalization that allows brands to reach consumers even in the smallest segments. In addition, an increase in government intervention and regulations put more financial pressure on companies.

Keeping Ahead of the Curve

We closely track and analyze trends through intercontinental partnerships and discussions at the expert level and market research units. Our offices in Shanghai and Shenzhen also precisely follow new directions and consumer behavior in Greater China.

Agency Challenges

Due to travel restrictions, including quarantine regulations that are still extensive in some cases, it is still a challenge to meet existing and new customers. The cancellation of trade fairs makes this even more difficult. But we see hope and are confident that we will gradually return to normality within 2022.

NORDICS

R&B Rights & Brands

PATRICK ULLMAN, CHIEF EXECUTIVE OFFICER,
KRISTIN TJULANDER, NORDIC SALES DIRECTOR, RIGHTS & BRANDS

Trend Spotting in the Nordics

We are seeing sustainable products, design both simple and more thought through that derives from the brand's identity in question. Consumers need to understand why a particular product brand collaborates with a specific licensed brand. The Nordic product production and respect for long-lasting products have always been a factor, and is only gaining strength. On a similar note, we notice that handicrafts are trending, at least in the Nordics, with updated takes on knitting, cross-stitching and DIY alongside gardening and the ever-increasing home decorations and interior design trend. It's also clear that heritage licensing has gone mainstream and is attracting high-end clients and DTR and private labels.

Keeping Ahead of the Curve

We strive to be quick in our process, keep close contact with the proprietors who trust their brand in our hands and plan our activities and work to the best of our capabilities. We are constantly increasing the services to proprietors and licensees. A couple of years ago, we focused on sales and fairs. Now, R&B (Rights & Brands) offers retail management expertise, social media, content services and business insights in addition to the traditional licensing agent setup. R&B also drives new development of brands and storytelling with in-depth knowledge of publishing. Collecting data and staying on top of new digital trends is vital to today's agency work. We have devoted staff to following trends and updating the sales team to keep track of NFTs, gaming and general online trends.

Agency Challenges in 2022

In specific markets, the 2019-2020 period created a slow turnaround at retail that pushes new activities forward. Many new brands come to the marketplace in a shorter window than before, which leads to some brands not getting enough attention and support from the various actors in the business. Retail licensees and proprietors must come to terms with e-commerce and online activities to stay relevant to consumers. For traditional proprietors, this may come across as "scary" or uncertain territory, and as an agency, we must provide knowledge and guidance and constantly update contract terms, approval processes and ways of communication.

ITALY



MAURIZIO DESTEFANO, PRESIDENT, OWNER,
MAURIZIO DESTEFANO LICENSING

Trend Spotting in Italy

There is a lot of appetite for new content from licensees – a desire to bring something fresh to retailers. However, the licensing industry does seem to be struggling to offer unique content at the moment. On the other hand, there is a definite trend towards new licensing programs featuring YouTubers and creators. Though less seems to be happening in classic animation, programs are also being inspired by video games. There is, however, a trend towards targeting young adults with brands, fashion and lifestyle offerings. Italy is a pretty traditional market from a licensing point of view; classic animation – and notably preschool properties, especially if aired on DTV – are still among the best sellers. This only started to change recently thanks to some successful pioneers who have helped YouTubers and creators to enjoy success in the Italian market. This will pave the way for much more of this kind of activity in the coming months.

The Changing Landscape of Licensing

Consumers will continue to embrace the merchandising of their favorite heroes, brands and artists. Licensing will continue to exist. However, the industry will need to adapt to continuous changes in the market. These are primarily driven by technology, which allows for new ways of enjoying content, new approaches to merchandising (such as NFTs), new forms of merchandising distribution and new ways of purchasing. All that said, I believe that the real shopping experience at retail will always be the most appealing way to shop for merchandise as far as human beings are concerned.

Keeping Ahead of the Curve

By looking at the industry news to see what is new, trendy and growing. By trying, in other words, to be up to date with what the market is offering. I do this every day; I have to! Things change quickly, and I want to ensure I can always recommend to my licensees approaches that can work in my market – in all licensing segments.

Agency Challenges in 2022

I believe there will be two stages to 2022. Initially, it will be challenging due to the continuing after-effects of the pandemic: the rising prices of goods, delays in availability with merchandise arriving from China and all the other uncertain aspects of our lives lately. Then, once we finally move on from the pandemic, economic prospects will improve as the return to everyday life encourages a greater appetite for new products.

Top Trends for Licensing Agents

These are the categories that will dominate for brands in the upcoming months.



Kids

The kids' industry is far-reaching for licensed consumer products (in categories such as toys, home décor and plush), and Generation Alpha has firmly made its mark as tastemakers of the category. It's a category primed for growth. UTA, the North American licensing and publishing agency for the YouTube Originals series, "Super Sema," is working with Just Play to focus on retail initiatives and partners in multiple categories. Spotify has announced an exclusive multi-year agreement with "CoComelon," produced by Moonbug Entertainment, for a new podcast, "CoComelon' Storytime."



Fashion

While styles ebb and flow (tie-dye, athleisure and the like are giving way to dressier outfits), apparel and accessories licensing remain paramount in any brand's portfolio. Licensing agencies can work with clients to be a part of the wardrobes of all generations. Global Icons, the agency representing the Betty Boop character, launched an apparel collaboration with Dolls Kill and Minga London clothing line. E-commerce is vital in fashion, from direct-to-consumer websites to subscription boxes, and is proving the growth channel now and moving forward for licensed consumer products.

"Subscription boxes are convenient, and there is a box out there for everyone," says Bethan Garton, chief commercial officer, The Point.1888. "The subscription box is like receiving a gift perfectly tailored to the receiver, and who doesn't love a gift?"



Food and Beverage

Agencies are helping food and beverage brands bring more excitement to the supermarket shelves this year. The Joester Loria Group and Pink Key Consulting launched several activations for Tony the Tiger during the Chinese New Year in North America and Europe, respectively. Poetic Brands partnered with food brand Walkers to launch a range of adult apparel in the U.K. and Ireland through a deal brokered by Walkers' licensing agency, IMG.

"Some agencies are shifting focus to the newest trend that arose because of lockdowns and safeguards," says Ross Misher, chief executive officer, Brand Central. "More Americans are ordering takeout or delivery every week. The Ghost Kitchen space is skyrocketing, and we are entering this space with our clients in a significant way. Consumers are feeling adventurous when it comes to food right now and want to explore new flavors, restaurants, new dishes, and try the things they see going viral on TikTok."



Gaming

The phrase “gaming” runs the gamut, from physical sports like football to board games. Licensing agents can help their clients reach customers regardless of their playing field. WildBrain CPLG recently acquired global representation rights for the Swiss motorsport company Sauber Motorsport. Audio brand Skullcandy is working with Beanstalk to extend its intellectual property into product categories, including audio equipment, consumer electronics, sport and outdoor goods and accessories, apparel, collaborations and experiences. Ubisoft revealed a partnership with the Italian brand Prada to bring the red stripe collection, Prada Linea Rossa, to “Riders Republic” outdoor sports playgrounds.



The Metaverse

While non-fungible tokens (NFTs) continue to be a buzzword, the metaverse is the digital darling of the moment. Licensing can live in this virtual world through gaming, apparel and many more categories. Jazwares recently announced the launch of Squishmallows on “Roblox” to expand the world of the Squishmallows toy brand.

“Digital consumption of products and content has grown significantly, even more during the lockdowns, says Tatiana Rivière-Cherqui, deputy director, TF1 Licensing. “It applies to the way people buy goods through retailers’ online stores (through services like live shopping) but also to the kind of quantity of content we have access to. Amongst all digital content, for instance, NFTs are growing and are becoming a not-to-be-missed topic, offering great perspectives in terms of business and marketing activations for brands.”



Sustainability

More companies are aligning their ethics to their business and are moving forward with plans to make quality products for their customers. Recently, adidas and Finnish textile material company Spinnova have worked together to debut the first product made in part with Spinnova fibers.

Licensing agencies can help bridge brands that have licensees with corporate social responsibility at the top of mind.

“Sustainable products, design both simple and more thought through that derives from the identity of the brand in question,” says Patrick Ullman, chief executive officer, Rights & Brands. “Consumers need to understand why a certain product brand is collaborating with a certain licensed brand. A story that resonates and is united with both.”

Consumerism 2.0

License Global is focusing on new opportunities in the consumer product industry for 2022.

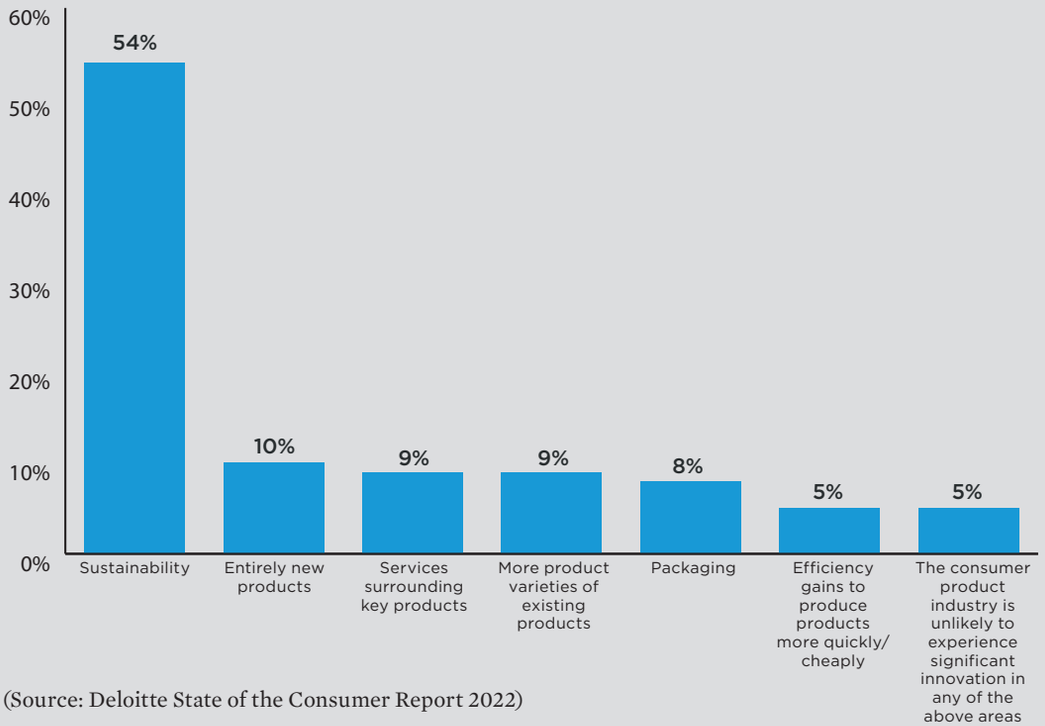
IT IS A universal truth that the brand and consumer landscape has changed. So, without retracing the events of the last two years, License Global looks at the behavior opening new creative opportunities in the consumer product industry for 2022.

Consumer Product Priorities

As of today, around 75% of brands could disappear overnight and most consumers would not care (source: Havas via The Point.1888). This is the rate at which change is happening and a stark reminder that brands need to understand what the consumer wants in order to survive.

Innovation is just one key priority point for consumers worldwide, with a recent study by Deloitte outlining what major steps and breakthroughs consumers want to see from consumer product brands. This wider shift in priorities is not only affecting spending intention, but lifestyle too. Thanks to the widespread acceptance of a hybrid working formula or, in certain cases, reduced working weeks, consumers are upgrading their homes, centering themselves and preparing for a new era with family in mind.

Expectations for Consumer Product Innovation



(Source: Deloitte State of the Consumer Report 2022)

73% U.K. 60% U.S.

73% of the U.K. and 60% of U.S. intend (to varying degrees) to focus on their well-being, center their homes and drive improvement in their lives, (Source: Deloitte State of the Consumer Report 2022)

3M

American households acquired a pet during lockdown, while British households adopted 3.1 million new family members. (Source: Brand Central)

57%

The number of Millennials who order food delivery so they can watch movies/TV at home. (Source: Brand Central)

2.2B

Streaming is expected to reach 2.2 billion users by 2026. (Source: Statista)

BRAND CENTRAL

Your Brand Front and Center

Delivering award-winning brand extensions







Generating buzzworthy collaborations







Creating impactful experiences







21 YEARS IN BUSINESS

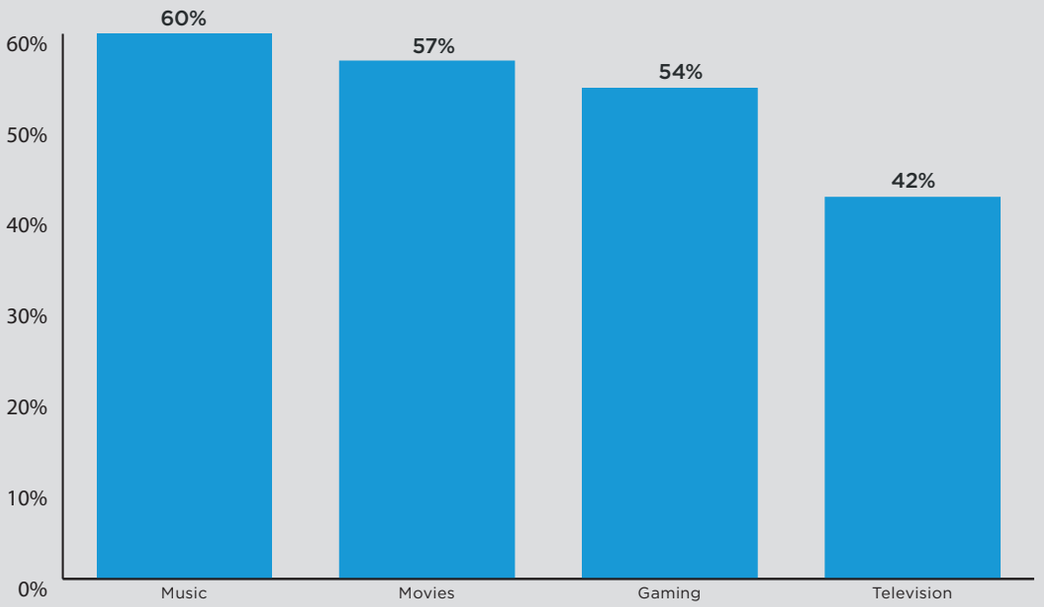
5 OFFICES coast to coast

TOP 10 LICENSING AGENCY LICENSE GLOBAL

3 BILLION RETAIL SALES

SIGNED **750+** LICENSE AGREEMENTS

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Source: IBM / NRF Consumer Behavior Report 2022

Around the globe, this sentiment for well-being has created a new kind of savvy consumers,who not only think about the impact of their purchases on the world, but on their day-to-day lives. A move to service-based subscriptions and the rise of ambient technology is giving our homes a new level of accessibility for retail, wellness and entertainment that has been expedited thanks to global crises and the exponential growth rate of technology.

Retail

The new age of retail in a digital world is bringing new focus for brands looking to engage Gen Z, adapt to thrive with new hybrid platforms and bring collaborations with a purpose to stores and sites worldwide. This has brought forward an exciting new age for retail's return after safety concerns dwindle and spending intention rises. How we shop is also changing, with increased focus on social media shopping (aka social commerce), live streaming and AR from brands worldwide.

"The retail environment has changed the share of revenue – the e-commerce business has now surpassed physical stores. An increase of specific *collab drops instead of ongoing collections* has also proven to be very successful." – *Patrick Ullman, chief executive officer, Rights & Brands*

$1.2T

Social commerce via platforms such as Instagram or TikTok is expected to grow at three times the rate of e-commerce by 2025 (Source: Brand Central) with a $1.2 trillion market value forecast by the same year. (Source: Bazaar Voice)

$5T

Worldwide e-commerce sales will exceed $5 trillion, accounting for more than a fifth of overall retail sales in 2022 with a forecast of $7 trillion by 2025 (Source: Emarketer)

63%

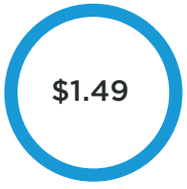
The percentage of consumer product brands that want to personalize the consumer experience via digital engagement. (Source: Bazaar Voice)

47%

The percentage of shoppers that are excited by the potential of technological evolution in the retail experience. (Source: Bazaar Voice)



NFTs reached a market value of $21 billion in 2021. (Source: Brand Central)



The global cryptocurrency market was estimated at $1.49 billion in 2020 and is expected to hit $4.94 billion by 2030, registering a CAGR of 12.8% from 2021 to 2030. (Source: Allied Market Research)



By 2022, the in-game skins market will soar to $50 billion. (Source: WSGN)

NFTs

The cryptocurrency market is nothing new, but the rise of the non-fungible token, combined with the increase in digitally enhanced living has brought about the perfect storm. The NFT market continues to rise, gaming and digital assets are higher on our priority list than ever before and the blockchain is becoming an openly accepted part of life.

Gaming

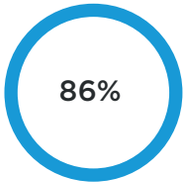
Gaming has overtaken TV for young Americans (Gen Z) and is quickly rising in the ranks as the most immersive, engaging and widely enjoyed pasttime of global consumers. Mobile gaming market share will surpass $93 billion in 2022 (source: Newzoo), 86% of all internet users actively game on some platform and with multi-billion-dollar developer acquisitions spurring the race for IP ownership, the growth of gaming has only just started.

What these trends mean is that the platform in which brands play is becoming increasingly connected, accessible and aligned with our day-to-day lives. We are becoming more open to buying new products, trying unique brands and partnering with retailers who stock products in line with our values.

As consumers, we want to enjoy life, find value in our investments, be entertained through experience and interact with our streaming. We want to treat ourselves better, whether it's shopping savvy, treating ourselves, carving a new career path or spending more time with family. This isn't just a collective awakening cause by global lockdown measures, it's the new age of consumerism. Long may it reign.



Mobile gaming market share will surpass $93 billion in 2022. (Source: Newzoo)



86% of all internet users actively game on some platform. (Source: Newzoo)

"We are excited about the NFT projects and the metaverse opening *fresh marketing* and business opportunities. More brands are getting excited about the topic and very innovative spaces are emerging as well as *fantastic brand collaborations* and creative, digital art projects." – *Jurgen Halder, founder, chief executive officer, Pure Brands*



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