LICENSING INTERNATIONAL

The **Licensing Trends** Driving **Retail Sales**

THE GLOBAL LICENSING Industry Study, released by Licensing International, is a comprehensive analysis of licensed products and services throughout 2024. The report offers valuable insights into current consumer purchasing trends driving the licensing industry and significant growth opportunities across categories and territories. The study details breakdown of revenues and royalties by property types, along with in-depth analysis of product category performance, and it presents regional data and market performance metrics to complete the global picture. The study, which is conducted by Brandar Consulting, contains licensing data from 935 companies in 56 countries. Members of Licensing International can access the full report for free, and it is also available for purchase to non-members.

+3.7%

GLOBAL RETAIL SALES OF LICENSED PRODUCTS AND SERVICES REACHED **$369.6 BILLION** IN 2024, A **3.7% INCREASE** OVER 2023.

+1.5%

THE **ENTERTAINMENT/CHARACTERS** PROPERTY CATEGORY GREW 1.5% TO REACH **$149.8 BILLION** IN REVENUE.

33% **ANIME, VIDEO GAMES** AND **SOCIAL MEDIA**

43% **FILM** AND **TELEVISION**

20% **RECENTLY LAUNCHED CHARACTERS** OR **BRANDS**

77% **FRANCHISES** AND **CLASSIC CHARACTERS** OR **BRANDS**

+6.1%

THE **CORPORATE BRAND** PROPERTY CATEGORY SAW REVENUE INCREASE **6.1%** TO **$95.8 BILLION** – A SIGNIFICANT INCREASE COMPARED TO THE 3.1% GROWTH REPORTED IN 2023.

+5.5%

LOCATION-BASED ENTERTAINMENT/THEMED ATTRACTIONS INCREASED **5.5%** IN 2024. THIS FOLLOWED A +13.5% INCREASE IN 2023 AND A +67.3% INCREASE IN 2022.

-2.7%

THE BIGGEST DECLINE IN A PRODUCT CATEGORY WAS IN THE **INFANT SEGMENT**, WHICH SAW REVENUE FALL **-2.7%** IN 2024. THIS DECLINE CAME AS THE UNITED NATIONS REPORTED THE GLOBAL FERTILITY RATE FOR 2024 WAS 2.2 BIRTHS PER WOMAN (DOWN FROM 3.3 IN 1990). IT IS PREDICTED THAT FERTILITY RATES WILL CONTINUE TO DROP, REACHING 1.8 BY 2050.

+3.1%

THE GLOBAL BRAND LICENSING INDUSTRY ONCE AGAIN PERFORMED BETTER THAN THE **OVERALL WORLDWIDE RETAIL MARKET**, WHICH WE CALCULATED TO HAVE ONLY GROWN AT A **+3.1%** RATE IN 2024 (COMPARED TO THE +3.7% INCREASE EXPERIENCED BY LICENSED PRODUCTS AND SERVICES).

RETAIL SALES CHANNEL SPLITS

31% THE **ECOMMERCE RETAIL CHANNEL** FOR THE LICENSING INDUSTRY REACHED A **31% SHARE** OF GLOBAL LICENSING SALES IN 2024. THIS WAS A SLIGHT DECLINE COMPARED TO THE 37% SHARE REPORTED IN 2023, WHICH WAS THE HIGHEST EVER MEASURED IN OUR GLOBAL STUDY. ONE CONTRIBUTING FACTOR WAS THE GROWTH OF EXPERIENTIAL RETAIL, WHICH ENCOURAGED CONSUMERS TO RETURN TO BRICK-AND-MORTAR RETAIL.

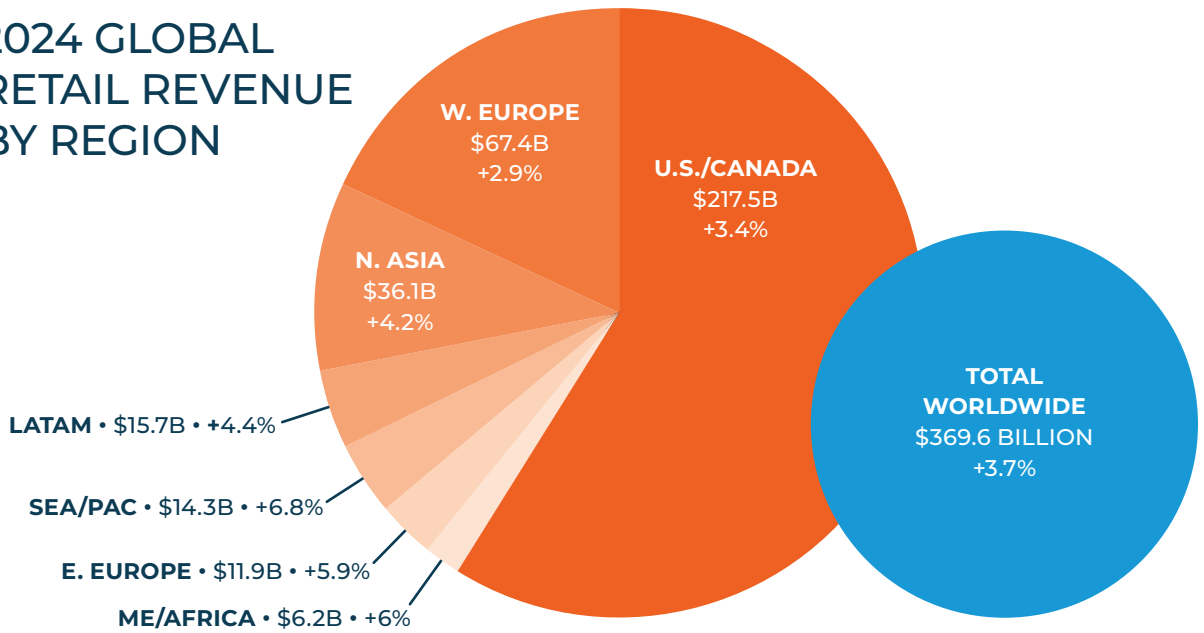
	2024			2023			2022		
REGION	B&M	On-Line	# Companies	B&M	On-Line	# Companies	B&M	On-Line	# Companies
U.S./CAN	65%	35%	110	58%	42%	67	69%	31%	66
W. EUROPE	73%	27%	142	61%	39%	90	65%	35%	92
LATAM	77%	23%	61	83%	17%	43	76%	24%	41
N ASIA	54%	46%	37	59%	41%	44	69%	31%	23
SEA/PAC	64%	36%	59	57%	43%	34	74%	26%	57
E. EUROPE*	76%	24%	15	60%	42%	5	58%	42%	10
ME/AFRICA*	70%	30%	11	70%	30%	7	83%	17%	9
WORLDWIDE	**69%**	**31%**	**438**	**63%**	**37%**	**302**	**70%**	**30%**	**360**

Source: 2025 Licensing International Global Survey respondents
*Note: Year-over-year changes in these regions have low responses are not statistically significant

SEVERAL REGIONS REPORTED ABOVE MARKET AVERAGE GROWTH RATES IN 2024, INCLUDING **SOUTH ASIA/PAC** (+6.8%), **ME/AFRICA** (+6%), **EASTERN EUROPE** (+5.9%), AND **LATAM** (+4.4%).

FOR THE SECOND YEAR IN A ROW, THE **U.S./CANADA** REGION REPORTED SOFTER GROWTH DURING THE SAME PERIOD WITH AN INCREASE OF 3.4%, WHICH WAS BELOW AVERAGE MARKET GROWTH.

2024 GLOBAL RETAIL REVENUE BY REGION



CLICK HERE to download the full report