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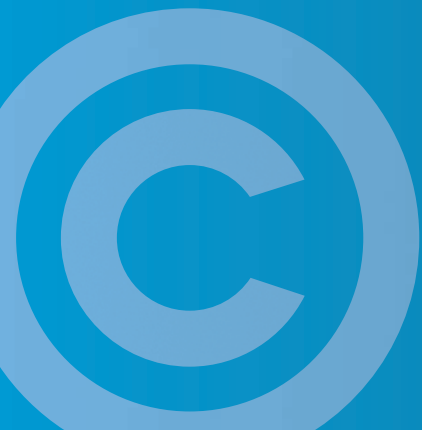
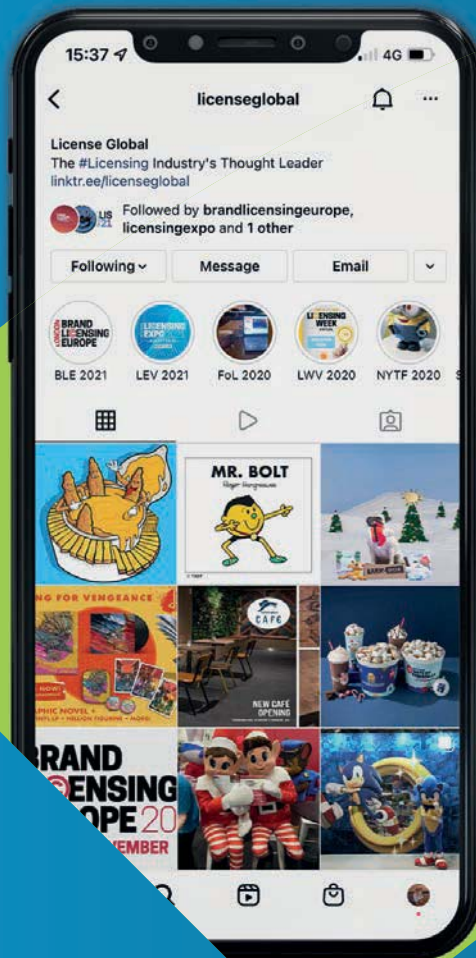
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LICENSING



# THE *Top 50* DRIVING THE BRAND LICENSING BUSINESS

**BRAND LICENSING IS** a business model built on leveraging the emotional connection between a buyer and a brand through consumer products, experiences and entertainment touchpoints.

Brand licensing, once a traditional merchandising model, has evolved into a dynamic consumer-driven practice. It can build brand awareness, generate revenue, service communities and create an entire universe of touchpoints for any intellectual property. However, the consumer also shapes the business, and the market's speed makes a more complex landscape, requiring a deep understanding of each consumer category, product and marketplace.

Amid this constantly changing landscape of consumer trends lie impacting factors that have challenged global retail and consumer confidence, adding another layer to the ongoing hurdles presented to the brand market.

Brand licensing agents are pivotal in strategically guiding brands into new markets, keeping global IPs agile and fostering engagement through authentic partnerships across countless touchpoints. Their work is not just a part of the brand licensing business but also the very essence that drives its success.

Often in charge of numerous or multiple household name brands, brand licensing agents are the drivers of the potential behind the brand licensing business for many, creating opportunities across video games, food, fashion, entertainment and more for their clients.

License Global created the Top Global Licensing Agents report to understand the influence and expertise in the brand licensing agent community. This annual report highlights the companies driving the business forward, making it a valuable resource for anyone interested in the brand licensing industry.

*Brand licensing agents are pivotal in strategically guiding brands into new markets, keeping global IPs agile and fostering engagement through **authentic partnerships** across countless touchpoints. Their work is not just a part of the brand licensing business but also **the very essence that drives its success.***

License Global's methodology is simple: we invite brand licensing and extension agencies worldwide to participate in the Top Global Licensing Agents report by submitting global retail sales of licensed consumer products from the previous calendar year (in this case, 2023). The License Global team then validates each agency and cross-checks submissions to build each annual report. With all data retrieved and collated, License Global ranks according to submitted revenue. In the result of a tie, agencies are positioned alphabetically until 50 ranked positions have been filled.

Despite working with the agencies on our list directly to ensure accuracy, many businesses are often unable to participate due to time pressures, client preference and confidentiality clauses. Therefore, the Top Global Licensing Agents report can only claim to represent part of the picture when ranking the global sales activity of agencies and their represented clients.

Thankfully, the view provided by the financial submissions in this year's report indicates the continued growth of the brand licensing business. After all, brand licensing touches all areas of consumer interest, meaning countless impacting factors are always at play. However, amid consumer confidence concerns, cost-of-living crises, business shifts, mergers and streamlining, License Global saw a \$5.70 billion growth in the total revenue of licensed goods sold at retail in 2023 over sales figures for the previous year. The total for licensed goods sold last year via our submitting agents was \$93.63 billion, with the top 10 agents in our list generating \$69.60 billion.

You can find an overview of the global totals in our Brandscape feature, along with insights into the most



*License Global saw a **\$5.70 billion growth** in the total revenue of licensed goods sold at retail in 2023 over sales figures for the previous year.*

sought-after consumer categories in 2024/25. Or explore the Top Global Licensing Agents rankings for a clear breakdown of the names driving the business forward.

For now, License Global would like to thank the global brand licensing agent community for its contribution, time and expertise as we continue to gauge the potential and activity of the worldwide brand licensing business. ©

\*License Global consults various industry sources, financial documents, annual reports, etc. 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 March 1, 2024.

# WHAT MAKES A *Top Global Agent?*

License Global surveyed the Top Global Licensing Agents to find out how a company transforms into an agent of success.

**THE RANKINGS SECTION** in this report may only outline licensing revenue for the biggest agents in the licensing game, but it's more than the dollars that make the agent. More than anything, a Top Global Licensing Agent is an agent who knows how to strategize. The licensing industry is continuously changing, growing into new trends and revisiting trends from the past to engage consumers. Licensors are creating new IPs and revitalizing evergreen content. Licensees aim to create quality consumer products that adhere to the licensor's vision. As the collaborative force between these two forces, a Top Global Licensing Agent must be aware of industry trends and forecast how these factors will transform in the future to facilitate a long-term successful licensing relationship. In our Top Global Licensing Agents survey, License Global requested the strategic initiatives and priorities defining the latter part of this year and next. For 2025 and the remainder of this year, License Global's Top Global Licensing Agents have outlined numerous strategies involving key trends for continuing their growth trajectory.

## **Technology and Innovation**

As we see technological advancement across all industries, the growing usage of the newest gadgets and software is a trend that Top Global Licensing Agents are honed-in on. As tech continues to advance, agents are directing resources toward investing in cutting-edge technology like generative AI, which enables real-time insights, operational efficiency and personalized solutions for clients. In addition, agents focus on integrating AI into processes to enhance decision-making and automate routine tasks, ensuring agencies stay ahead of the curve. Continuous technological expansion, including

blockchain integration and data analytics, optimizes brand management and identifies emerging trends faster. This focus on tech implementation results in greater revenue, as a 2020 study from Oracle found that companies that utilize emerging technologies increase their annual revenue by 58%.

## **Sustainability and Consumer-Centric Approach**

Sustainability is a hot topic across all verticals in the licensing space. Long-term partnerships focusing on eco-friendly practices and materials align with consumer values, enhance brand reputation and contribute to market positioning. Agents prioritize adaptability, strategic planning and sustainability to ensure agencies navigate market shifts effectively and maintain a competitive advantage. Forbes says 92% of consumers are more likely to trust environmentally or socially conscious brands, and 88% will be more loyal to a company that supports social or environmental issues. INC. found that 66% of global consumers are willing to pay more for sustainable products. Focusing on consumer preferences and delivering a balanced product mix ensures brand relevance and fosters strong connections with target audiences.

## **Diversity, Inclusion and Transparency**

More than just a trend, building a diverse workforce and actively engaging with previously overlooked consumer segments foster inclusivity and unlock untapped market opportunities. According to the McKinsey D&I Global Market Report, inclusive teams are 35% more productive and diverse companies earn 2.5 times higher cash flow per employee. Business decisions are also less likely to go awry with a diverse team, with diverse

teams making better decisions 87% of the time. Diversity, inclusion and transparency are a continuous commitment to the workforce and the consumer base, allowing for greater product relatability. A LinkedIn study found companies with a diversity, equity and inclusion team were 22% more likely to be seen as “an industry-leading company with high-caliber talent” and 12% more likely to be seen as an “inclusive workplace for people of diverse backgrounds.” Simply put, companies devoted to diversity are seen more positively, both by potential partners and consumers. Cultivating a culture of transparency and authenticity builds trust and ensures alignment with public opinion and values, which is crucial in today’s information-driven society.

### Partnerships, Collaboration and Global Expansion

Agents are leaning toward the continued trend of globally expanding businesses. Even with increased global tensions, The Harvard Business Review asserts globalization is still a smart strategy for companies.

“While the public-policy environment has become less conducive to globalization, the resilience of global flows cautions against more dramatic strategy changes predicated on the notion that markets will become substantially less globalized,” say Steven A. Altman and Caroline R. Bastian, The Harvard Business Review in a 2023 analysis.

Agencies are leaning further into partnerships to accomplish this expansion. Strengthening direct-to-retail partnerships, expanding regional reach and building international relationships drive market expansion and enable access to diverse consumer bases. The collaboration extends beyond business, with trend forecasting leaning heavily on the consumer base. Leveraging social media for trend identification and fostering collaborations enables brands to stay ahead of the curve and engage with consumers innovatively. With these

trends in mind, curating innovative partnerships and collaborations fosters brand excitement, expands market reach and drives consumer engagement through novel connections and experiences.

### Customer Experience and Engagement

Gallup found successfully engaged customers represent an average 23% premium in share of wallet, profitability, revenue and relationship growth compared to average customers. According to Forrester, 62% of businesses identified as “customer-obsessed” stated their omnichannel customer engagement strategy had driven higher margins than non-customer-obsessed firms. Additional engagement strategies include building a social media presence and fostering consumer relationships. Engaging with potential consumers on social media is a strategy among the Top Global Licensing Agents. According to Forbes, an estimated 4.9 billion people were on social media worldwide in 2023. Using social media to increase brand awareness and engagement has become a priority, and it’s working, with Forbes finding 90% of social media users follow at least one brand. Prioritizing customer satisfaction, enhancing brand engagement through social media and amplifying brand awareness contribute to holistic brand management and market penetration.

### Market Trends, Flexibility and Adaptability

Strategy, above all, stems from the state of the market. Staying abreast of emerging trends, being agile in AI utilization and focusing on strategic and innovative product assortments ensure timely responses to market trends and maximize impact. While keeping the aforementioned trends in mind when strategizing is a great place to start, agencies must also adapt quickly to changing market demands, maintain customer-centricity and deliver sustainable revenue for clients and licensees. ©

92%

CONSUMERS MORE LIKELY TO TRUST ENVIRONMENTALLY OR SOCIALLY CONSCIOUS BRANDS

Source: Forbes

62%

BUSINESSES IDENTIFIED AS “CUSTOMER-OBSSESSED” STATED THEIR OMNICHANNEL CUSTOMER ENGAGEMENT STRATEGY HAD DRIVEN HIGHER MARGINS THAN NON-CUSTOMER-OBSSESSED FIRMS

Source: Forrester

90%

SOCIAL MEDIA USERS THAT FOLLOW AT LEAST ONE BRAND

Source: Forbes



# TOP 50 GLOBAL LICENSING AGENTS

Rank	Company	Retail Sales	Rank	Company	Retail Sales
1	IMG	\$17.20B E	27	Evolution USA	\$500M E
2	CAA Brand Management	\$13.83B E	28	Brevettar <b>NEW!</b>	\$455M E
3	Beanstalk	\$10.10B E	29	Brand Licensing Team	\$450M E
4	LMCA	\$7.73B E	30	Bulldog Licensing <b>NEW!</b>	\$421.50M
5	Brand Central	\$3.90B E	31	Valen Group	\$400M
6	Global Icons	\$3.90B E	32	Haven Global	\$350M
7	WildBrain CPLG	\$3.60B E	33	Merchantwise Group - Merchantwise and Asembl <b>NEW!</b>	\$340M E
8	CLC	\$3.54B	34	Brand Appeal <b>NEW!</b>	\$300M E
9	Brandgenuity	\$3.00B E	35	LicenseWorks	\$280M E
10	The Joester Loria Group	\$2.80B E	36	La Panadería Licensing & Marketing	\$230M E
11	ALIFISH <b>NEW!</b>	\$2.75B E	37	Jewel Branding & Licensing	\$200M E
12	Guangzhou Art-land Holding Company	\$2.75B E	38	Starwood Brands	\$200M E
13	Global Trademark Licensing <b>NEW!</b>	\$2.00B E	39	Destra <b>NEW!</b>	\$180M E
14	The Brand Liaison	\$1.50B E	40	MHS Licensing + Consulting	\$149M E
15	Broad Street Licensing Group	\$1.43B E	41	Maurizio Distefano The Evolution of Licensing	\$145M E
16	Seltzer Licensing Group	\$1.40B E	42	Medialink Animation International	\$142M E
17	Striker Entertainment	\$1.10B E	43	Pure Brands <b>NEW!</b>	\$115M E
18	Retail Monster	\$1.05B E	44	Pink Key Licensing <b>NEW!</b>	\$75M E
19	IMC Licensing	\$836.24M	45	Mix Licensing Group <b>NEW!</b>	\$60M E
20	Rights & Brands	\$825M E	46	Peaks Partners <b>NEW!</b>	\$60M E
21	Redibra	\$662M E	47	TrelImage <b>NEW!</b>	\$45M E
22	TSG Brands	\$620M E	48	Dimensional Branding Group <b>NEW!</b>	\$22M E
23	VIZ Media	\$600M E	49	Caravansera Partners <b>NEW!</b>	\$13M E
24	Lisa Marks Associates	\$565.60M E	50	Big Picture Licensing <b>NEW!</b>	\$10M E
25	Tycoon Enterprises	\$565M E			
26	Licensing Street	\$545M E			

[CLICK HERE](#) for full list including key clients and brands

Top Global Licensing Agents submitted estimates (E) are provided by the submitting agency and are not approximate financial figures. Client lists are written and submitted by the participating agencies, although edited by License Global to suit house style. NEW! indicates companies that were not a part of 2023's ranking.

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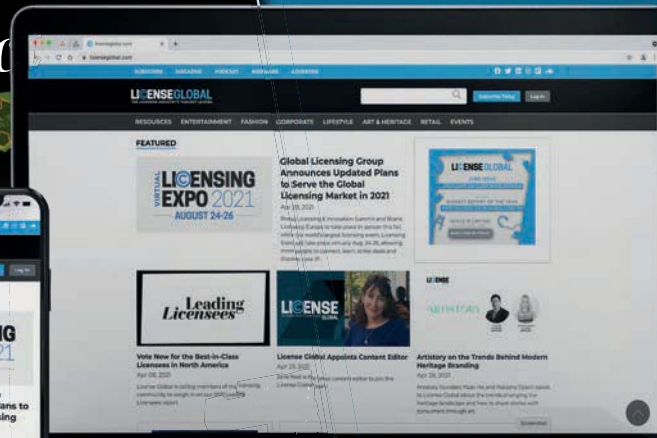
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# Brandscape 2024



TOTAL RETAIL  
SALES 2024



TOTAL RETAIL  
SALES 2023



GLOBAL RISE  
OVER 2023 REPORT

**LAST YEAR, THE** Top Global Licensing Agents reported an annual total of \$87.92 billion in licensed consumer products sold at retail in 2022.

The Top Global Licensing Agents 2024 ranked 50 agencies representing the consumer product interests of hundreds of household names, uncovering signs of global growth in the process. Across 50 ranked positions, the total number of licensed consumer products sold in 2023 rose \$6.01 billion to reach a worldwide total of \$93.94 billion.

The Top 10 agencies featured in the Top Global Licensing Agents report this year accounted for \$69.60 billion in licensed consumer product sales at retail as represented by agencies. The Top 20 agencies in 2024 reported over \$85.24 billion worldwide licensed consumer goods sales.

The predominant percentage of businesses featured in the report service a global brand and consumer base; however, when exploring agencies by headquarters, License Global saw a rise of over \$7 billion for the North American region alone, closely followed by Latin America, which grew over \$383 million – marking two key regions contributing to growth. Companies headquartered in the Asia-Pacific region totaled \$8.61 billion, while agencies in the European region (including the U.K.) contributed \$5.26 billion to global figures.

The Top Global Licensing Agents report is a submissions-based insight piece and can only act as a

barometer for business activity worldwide.

However, an apparent rise in represented revenue of licensed goods sold at retail across 2022 – with significant increases for individual brands – indicates health, activity and movement within the global consumer market. License Global also welcomed several new agents to the report this year, which signals increasing demand for licensed consumer products worldwide.

When speaking to each submitting agent, License Global surveyed to find out what the key brand strategies will be for brand owner clients in 2024 and into 2025.

Fashion and apparel featured prominently in these categories, gathering 69% interest for future licensed consumer goods and brand extensions. Fashion was a leading theme throughout 2022 and 2023 across all key divisions (licensee, licensor and agent). This year, our Agents' survey outlined that fashion is quickly followed by food and beverage (51%), toys and games (46%), health and beauty (32%), footwear and accessories (28%), location-based entertainment (26%) and home décor (26%) as the leading options for licensed consumer products moving forward.

In summary, this report's key findings have shown growth in total global retail sales of licensed goods represented by brand licensing agents and continued interest in key categories shaping the future of the brand licensing and extension market. ©

## TOP 1-10 AGENTS

1. IMG
2. CAA BRAND MANAGEMENT
3. BEANSTALK
4. LMCA
5. BRAND CENTRAL
6. GLOBAL ICONS
7. WILDBRAIN CPLC
8. CLC
9. BRANDGENUITY
10. THE JOESTER LORIA GROUP

**\$69.60B**

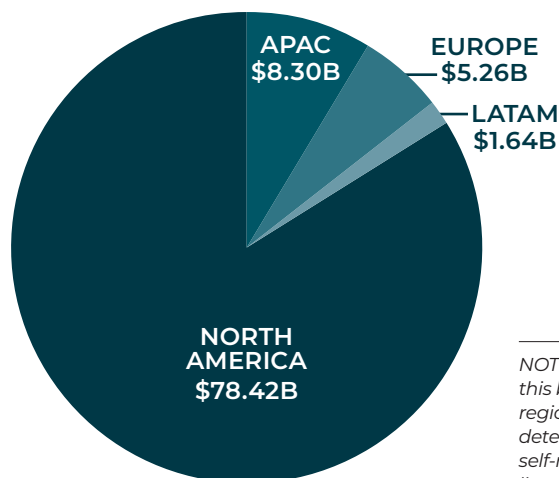


TOP 20 AGENTS

## TOP 11-20 AGENTS

11. ALIFISH
12. GUANGZHOU ART-LAND HOLDING COMPANY
13. GLOBAL TRADEMARK LICENSING
14. THE BRAND LIAISON
15. BROAD STREET LICENSING GROUP
16. SELTZER LICENSING GROUP
17. STRIKER ENTERTAINMENT
18. RETAIL MONSTER
19. IMC LICENSING
20. RIGHTS & BRANDS

**\$15.64B**



REGIONAL TOTALS

*NOTE: To craft this breakdown, regions were determined by self-reported brand licensing agency headquarters.*

## KEY CATEGORIES IN 2023





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