

WHO ARE THE NEW AGENTS ON THE LIST? FIND OUT INSIDE!

THE LICENSING INDUSTRY'S THOUGHT LEADER

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THE TOP GLOBAL LICENSING AGENTS



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The Licensing Industry's Thought Leader
LICENSEGLOBAL.COM

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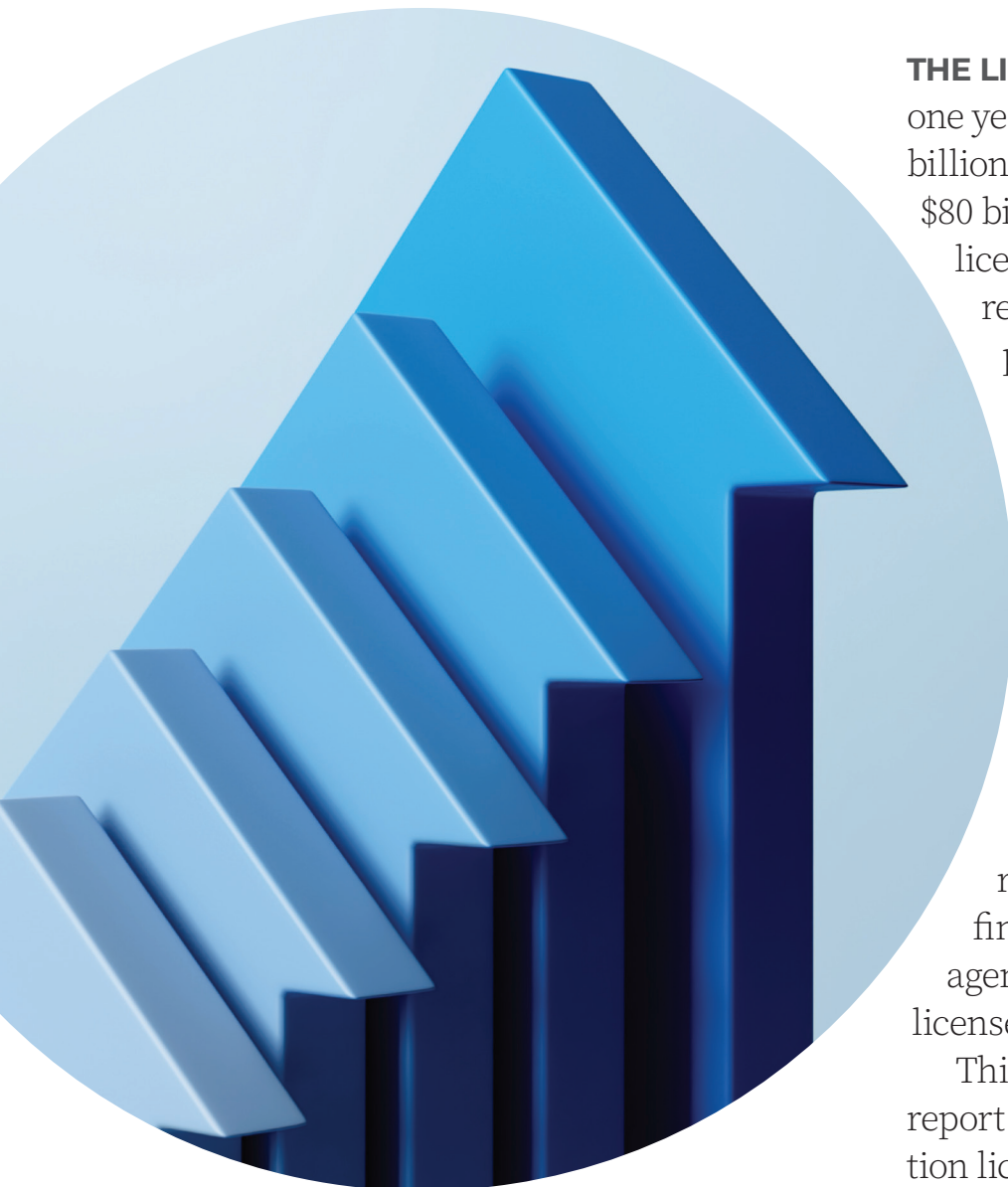
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TOP GLOBAL LICENSING AGENTS 2023

The licensing industry had significant growth in 12 months, thanks to the help of licensing agents.



THE LICENSING INDUSTRY is thriving. In just one year, retail sales saw an increase of \$10 billion, from \$70 billion in 2021 to more than \$80 billion in 2022. The increase is due to licensing agents and the brands they represent continuing to alter the consumer product landscape by introducing branded collaborations throughout last year and more for 2023 and beyond.

License Global's annual Top Licensing Agents report examines the retail sales of the world's leading brand extension agencies, noting "ones to watch" and breaking down the biggest agents by region and in granular detail. The report showcases retail sales data for the previous year's financial reports as self-reported by each agency and represents global sales of licensed merchandise.

This year, the Top Global Licensing Agents report has a fresh look reflecting the innovation licensing agents bring to the market

worldwide. IMG remains at the No. 1 spot for the fifth time in a row, with \$15.4 billion (up \$1.2 billion year-on-year) in retail sales for its clients such as Pepsi, “Fortnite,” Volkswagen and many more.

Following IMG at No. 2 is CAA, which reports \$13.7 billion in retail sales, Beanstalk at \$9.9 billion and LMCA with \$7.6 billion in retail sales.

This year, there are two new companies in the Top 20 list. Who are they? Read on to find

out – plus gain insight on licensing agencies by geographical breakdown, trends in the space of consumer products, and much more.

*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, 2023.

What is a licensing agent?

Licensing agents are tapped to represent marketable and extendible intellectual property on a brand’s behalf. Licensing agents, in partnership with the licensor, will develop a scalable strategy and take the necessary steps to fulfil and implement the strategy by sourcing suitable licensees and, in some cases, bringing the product to market by brokering retailer deals.

The role of a licensing agent is 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 a buzz in the market or maybe even a viral sensation.

Licensing agents’ top-level goals are to:

- Build new relationships and strengthen existing ones, allowing a brand to realize its extendible opportunity fully.
- Enter 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.

TOP 20 GLOBAL LICENSING AGENTS

Rank	Agency	Retail Sales
1	IMG	\$15.4B (E)
2	CAA Brand Management	\$13.7B (E)
3	Beanstalk	\$9.9B (E)
4	LMCA	\$7.6B (E)
NEW 5	Animation International	\$5.2B (E)
6	Global Icons	\$3.8B
7	CLC	\$3.65B
8	WildBrain CPLG	\$3.5B (E)
9	Brand Central	\$3.4B (E)
10	Joester Loria Group	\$2.8B

Rank	Agency	Retail Sales
11	Brandgenuity	\$2.4B (E)
12	Guangzhou Art-land Holding Company	\$2.1B (E)
13	MDR Brand Management	\$1.68B (E)
14	Broad Street Licensing Group	\$1.26B (E)
15	Seltzer Licensing Group	\$1.2B (E)
16	The Brand Liaison	\$1B (E)
17	Retail Monster	\$975M
18	Rights & Brands	\$900M (E)
19	Viz Media	\$710M (E)
20	Redibra	\$576M (E)

CLICK HERE for full list including key clients and brands

GLOBAL LICENSING AGENTS TO WATCH

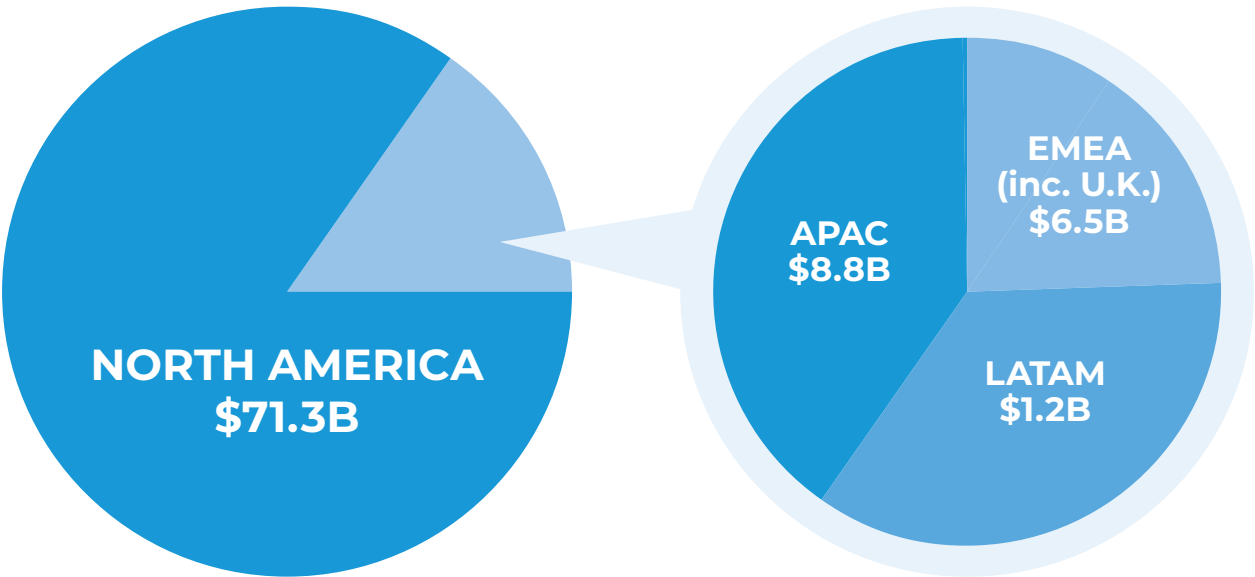
Rank	Agency	Retail Sales
NEW 21	Semk Global Marketing	\$500M (E)
NEW 22	Tycoon Enterprises	\$500M (E)
23	Lisa Marks Associates	\$456.8M (E)
24	Licensing Street	\$450M (E)
25	Alifish	\$430M (E)
26	Striker Entertainment	\$400M (E)
27	TSG Brands	\$400M (E)
28	Brand Licensing Team	\$395M (E)
29	Valen Group	\$350M
30	Evolution	\$325M (E)

Rank	Agency	Retail Sales
NEW 31	Haven Global	\$250M
32	LicenseWorks	\$225M (E)
33	Brand Activation Consulting	\$186.3M (E)
NEW 34	Starwood Brands	\$180M (E)
35	Jewel Branding & Licensing	\$170M (E)
36	MHS Licensing + Consulting	\$144M (E)
37	Maurizio Distefano The Evolution of Licensing	\$130M (E)
NEW 38	Medialink Animation International	\$113M (E)
39	The Point.1888	\$106M (E)
40	La Panaderia Licensing & Marketing	\$100M (E)

CLICK HERE for full list including key clients and brands

TOP GLOBAL LICENSING AGENTS: GEOGRAPHICAL BREAKDOWN

TOTAL REVENUE: \$87.9B



STATS AND TRENDS

Total Rise on 2022 Submissions: \$9,258,300,00	Highest Growth: The Point.1888 (+ 415%)	Total Revenue of Top 10 Agents: \$68,950,000,000	Largest Revenue Jump: CLC (\$1.25B)
Average Growth YoY (%): 39%	Total Position Shifts: 39	Total Revenue of Top 20 Agents: \$81,175,000,000	Total Revenue of New Brands to the List: \$3,880,600,000

TOP GLOBAL LICENSING AGENTS: MARKET OVERVIEW

In 2022, more than 50 brand licensing agents produced over \$80 billion in retail sales of licensed goods, representing thousands of household name brands. License Global takes a deep dive into the ongoing growth of the businesses behind the powerhouse brands making waves at retail through experiences and generating billions of impressions through high-profile collaborations.

AT A GLANCE

- A Continued Era of Growth
- The Current Trend Landscape
- Key Data Takeaways

A Continued Era of Growth

Last year, License Global reported that 62 submitting brands were responsible for \$80.29 billion in sales for the financial year of 2021. This year, we're pleased to reveal that global sales of licensed goods at retail have risen to \$87.92 billion, a \$7.8 billion rise over FY2021 with an average of 39% growth across the agent business.

Licensed agents returning to the report for the 2023 edition have generated an

average of 40% growth, with new brands on the list submitting an additional \$6.8 billion to the annual figures.

The top 10 agents in our ranking, alone, are responsible for more than \$69 billion in global revenue, with the top 20 generating a cumulative \$81 billion globally.

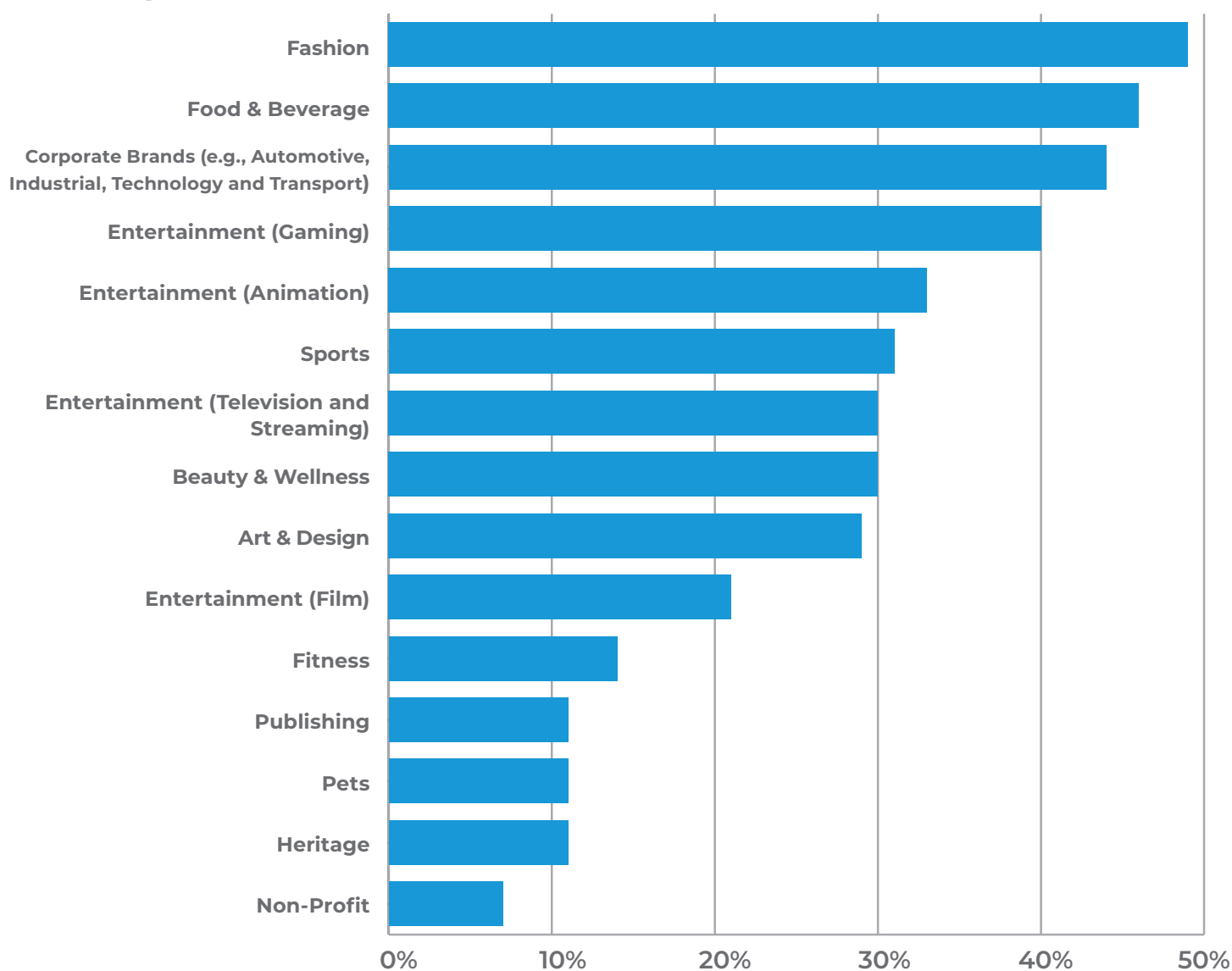
The Current Trend Landscape

Across the globe, trends pertinent to the licensing landscape are emerging, showing true staying power as well as sway among consumers. The key trends cover "kidult" culture, with the increase in collectibles, the ongoing demand for nostalgia properties and co-sharing of

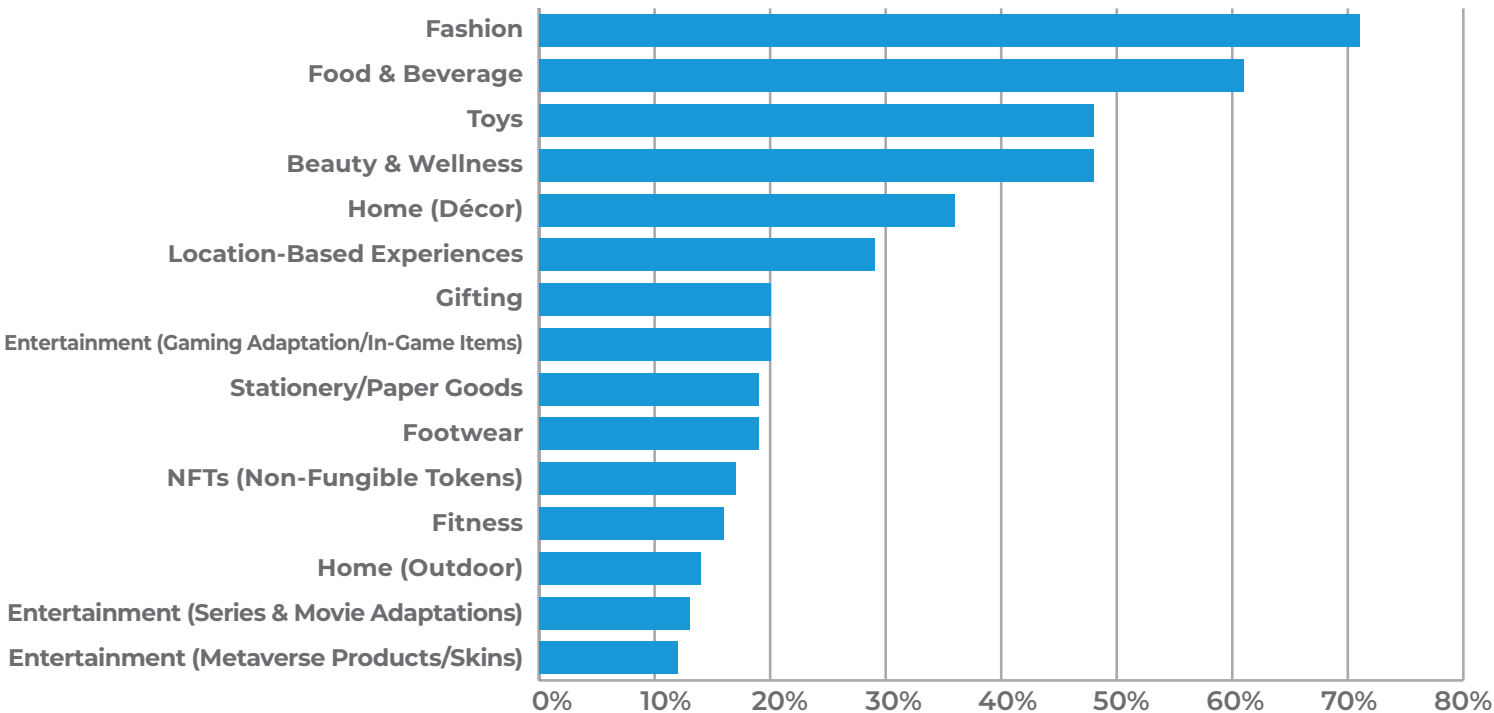
toys between parents and children. This hugely popular trend is on display across the world's toy fairs and is a continuous source of inspiration and success for the licensing business. Another key trend playing out worldwide is the continued success of location-based experiences, a market that has only become more crea-

tive as the licensing industry delves deeper into its potential. However, while these trends make for entertaining consideration of future potential, the License Global Top Brand Agents Report has uncovered the categories and products being backed by the biggest brands in the business over 2023.

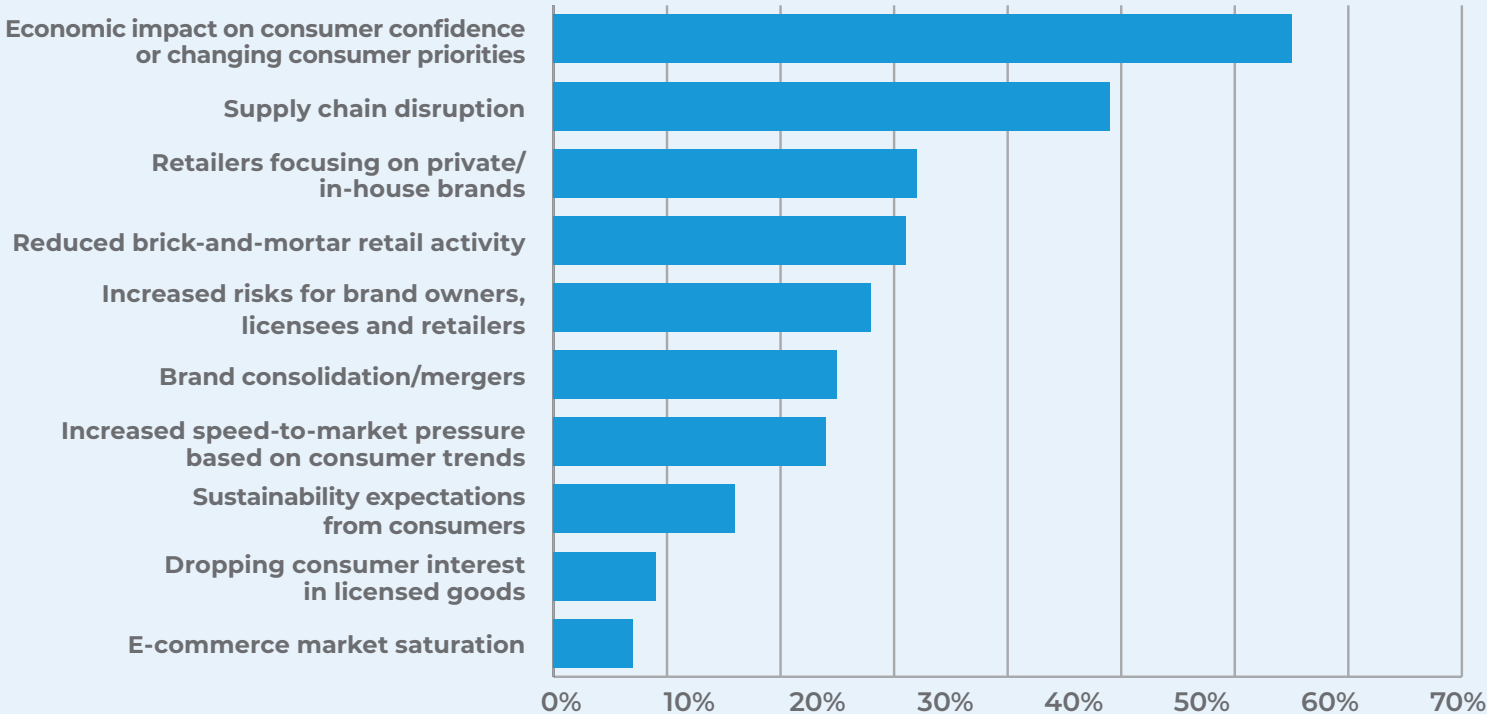
What brand categories offer the most significant opportunities for licensed consumer products in 2023/2024?



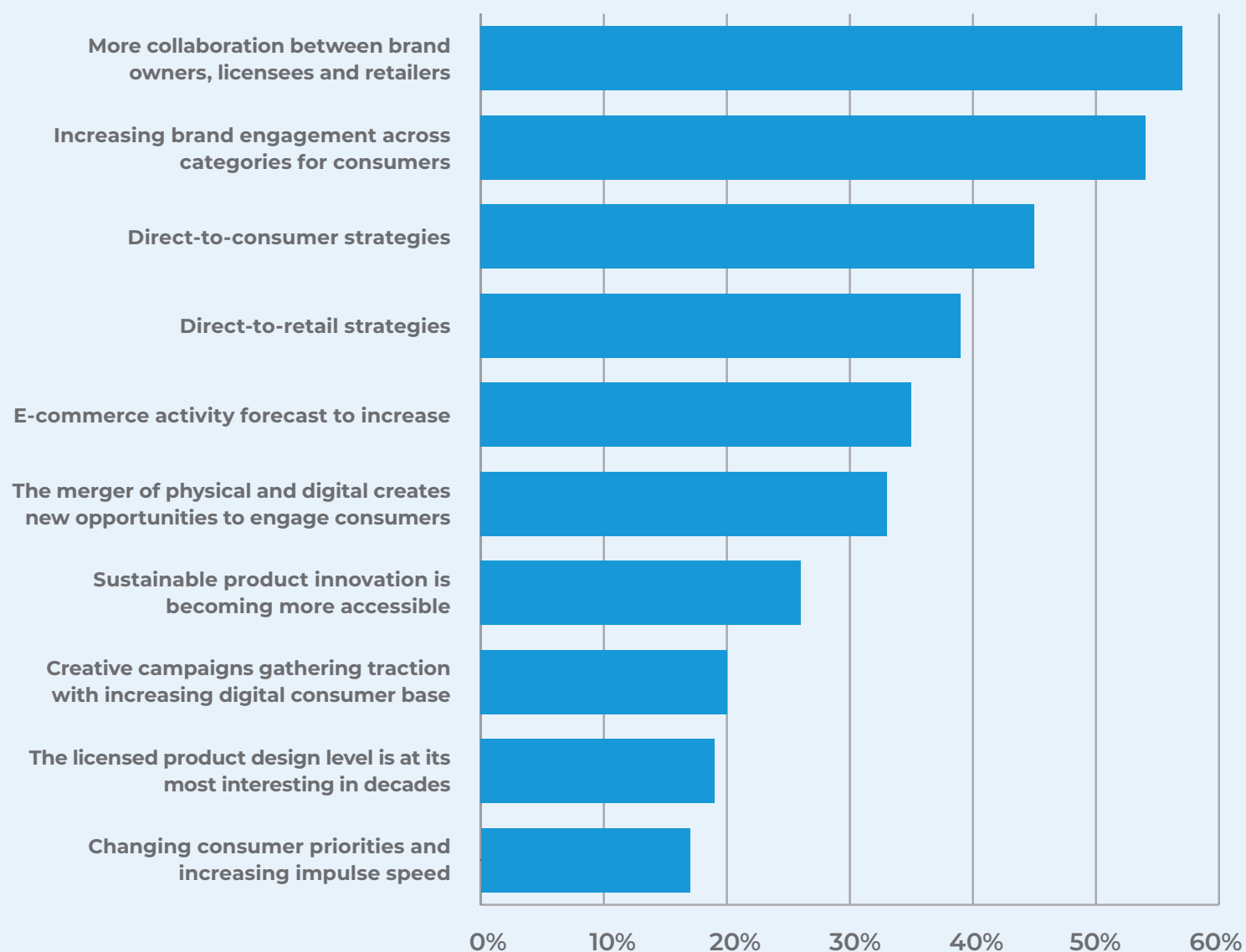
What product categories offer the most significant opportunities for licensed consumer products in 2023/2024?



What are the main challenges facing the global brand licensing industry today?



What are the main opportunities facing the global brand licensing industry today?



Our studies show that key opportunities for the licensing community, according to the global agency base, include fashion as the clear leader for extension category for brands licensing out, with food and beverage, corporate brands, entertainment and gaming following closely behind.

For product-based opportunities, the global agent base has highlighted fashion as another clear leader, with food and beverage, toys, beauty and home décor ranking in order of consumer demand.

However, with the world adjusting to a new normal based almost entirely on


uncertainty, our survey also highlights the biggest concerns and challenges being faced by brands worldwide. The economic impact of wider socio- and geopolitical factors on consumer confidence cannot be underestimated, with cost-of-living crises impacting purchase decisions and consumer priorities the world over. A huge 65% of survey respondents highlighted dropping consumer confidence as a major challenge, supported by supply chain issues, retailers focusing more on in-house brands and an increased risk for all parties within a licensing agreement as additional challenges to be overcome in 2023.

There were, on the bright side, clear winners in the opportunities discussion.

The increased collaborative nature of business in 2022 is a signifier of how brands will move forward in 2023 and 2024, with survey respondents adding that collaboration and extension will lead to further cross-category partnerships. Direct-to-consumer and direct-to-retail were also touted as growth opportunities in 2023 as more brands seek to adapt to an increased speed-to-market expectation by the consumer.

In short, the role of the agent is to be a disciplined negotiator, but above all else, a keen trend spotter, leading License Global to believe the results of our most-recent survey to be a clear and authoritative report on the growth, challenges and opportunities for licensing in 2023.©

Key Data Takeaways

Total Rise on 2022 Submissions	\$ 6,702,677,686
Average Growth Year-on-Year	39%
Highest Growth	The Point.1888 (415%)
Total Position Shifts	
Total Revenue of Top 10 Agents	\$ 71,150,000,000

THE MOST-EXCITING AGENCY-LED FASHION COLLABS

With fashion leading the way as a primary focus for the global licensing market this year, License Global looks at the agents cutting through with collaborative capsules and campaigns.



Miffy Year of the Rabbit by Joester Loria Group

The Lunar New Year marked the start of 2023 as the Year of the Rabbit, providing brands worldwide with an inclusive opportunity to showcase their creativity. One of the outstanding collaborations features Miffy, the iconic Dutch bunny created by Dick Bruna, who celebrated the occasion with a lineup of capsules and collaborations with brands including Mulberry, Tommy Hilfiger and The Wooble across a raft of deals brokered by the Joester Loria Group.



The Return of “The Raccoons” by ThePoint.1888

The Point.1888 signed The Hut Group and Truffle Shuffle for two apparel ranges as well as Intercake for cake toppers, for the television show and brand, “The Raccoons.” Playology International, signed by The Point.1888 in February 2022, also worked with Retrokid for an apparel and collectible range, as well as Roo and You for modular furniture and silicone products to launch later this year.



Christian Cowan’s ‘Teletubbies’ Collection by Wildbrain

WildBrain teamed up with British fashion designer, Christian Cowan, for a “Teletubbies” collaboration, following the brand’s 25th anniversary celebrations in 2022. The limited-edition “Teletubbies” collection featured the characters on hoodies, T-shirts and denim. Cowan created the collection to merge the Teletubbies with iconic, playful fashion campaigns that featured on billboards and magazine pages in the early ’90s when the brand first launched.



The UFC Fashion Line by IMG

UFC has announced several apparel and accessories collaborations through international agency, IMG, which takes the action outside of the Octagon to take the rapidly growing appeal of MMA even further through apparel and fashion. Working with global outfitting partners, Venum, and fashion partners such as Culture Kings, Goat Crew and others, the ongoing partnership brings the UFC look to fans and to the streets. Read our full insight into the UFC brand licensing program here.



AC Milan x Rolling Stones Collab by Bravado

AC Milan and The Rolling Stones have launched the second iteration of their collaborative collection after the two cultural icons began their journey together last June at the band's concert in San Siro, AC Milan's home stadium. The collection, led by Bravado, is available in all AC Milan stores (physical and online) and features four main pieces including a standout wool and faux-leather varsity jacket, adorned with patches and embroidery front and back, featuring a print reading "AC Milan x The Rolling Stones," with the embroidered track title, "Sympathy for the Devil" – one of the band's most famous songs, which references the Devil, a symbol of AC Milan.



Poetic Brands x Xbox by Beanstalk

As video games become the global go-to entertainment format, Poetic Brands is bringing Xbox to fans in a three-year deal brokered by licensing agency, Tinderbox, specialist digital division of Beanstalk. The partnership will see Poetic Brands bring a variety of Xbox products to the U.K. market across categories including men's and women's apparel, nightwear and underwear, to further establish Xbox as an entertainment and lifestyle brand. The agreement will also see Poetic Brands introducing a collection of Xbox-branded luggage into the range, a first for the Xbox brand.