

THE ECONOMIC FOOTPRINT OF BRANDED MERCHANDISE

Australia and New Zealand, 2025



AUSTRALIA AND NEW ZEALAND'S MARKET SPENDING



\$9 billion (USD 5B)

Total branded merchandise spending
in Australia and New Zealand in 2025

Australian and New Zealand market spending
accounted for **2% of global spending on branded
merchandise products** in 2025.

Promotional products \$4B (USD 3B)

Licensed merchandise \$5B (USD 3B)

Promotional product spending sourced from PPAI distributor sales reports and supplemented by a survey of industry buyers uncovering alternative channels of sales.
Licensed merchandise data sourced from the Global Licensing Survey.

ECONOMIC IMPACT SUPPORTED BY AUSTRALIA AND NEW ZEALAND'S MARKET SPENDING



\$11 billion (USD 7B)

Contribution to GDP sustained
by the branded merchandise
industry in 2025

Representing 0.3% of national GDP, or
\$1 in every \$300 of economic activity



55,000

Jobs supported by the branded
merchandise industry in 2025

Equivalent to 1 in every 320 jobs
in Australia and New Zealand



\$4 billion (USD 2B)

Contribution to tax revenues
supported by the branded
merchandise industry in 2025

Equivalent to \$310 per Australian and
\$120 per New Zealand household

GDP IMPACT BY CHANNEL

Direct impact
\$3B (USD 2B)

+

Indirect impact
\$3B (USD 2B)

+

Induced impact
\$4B (USD 3B)

=

Total impact
\$11 billion (USD 7B)

The economic activity
generated by the industry's
own operations (divided into
downstream, midstream, and
upstream components)

The economic activity supported
through the industry's supply
chain spending with other
sectors in the economy

The economic activity supported
when employees of the industry
and its suppliers spend their
wages in the wider economy

The sum of all channels
of impact

EMPLOYMENT IMPACT BY CHANNEL AND INDUSTRY VALUE LAYER

Direct jobs
22k generated

+

Indirect jobs
14k supported

+

Induced jobs
19k supported

=

Total jobs supported
55k

Of the 22k direct jobs generated by the industry

16k downstream jobs

Midstream

3k jobs

Upstream

2k jobs



Downstream firms

carry out buyer-facing activities:
promotional product distributors,
licensed merchandise retailers,
brand activation activities,
e-commerce retailers.



Midstream firms

carry out wholesaling and
warehousing activities
and decorate promotional
products (promotional
product suppliers).



Upstream firms

manufacture branded
merchandise goods
(licensed merchandise
goods and blank
promotional products).

Throughout this report, \$ denotes Australian dollars. USD equivalents are shown in brackets, converted at the 2025 annual average.