

THE ECONOMIC FOOTPRINT OF BRANDED MERCHANDISE

Canada, 2025



CANADA'S MARKET SPENDING



\$13 billion (USD 9B)

Total branded merchandise spending in Canada in 2025

Canadian market spending accounted for **3% of global spending on branded merchandise products** in 2025.

Spending on promotional products could make up **15% of spending on advertising in Canada**.

Promotional prod. \$3B (USD 2B)

Licensed merchandise \$10B (USD 7B)

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 CANADA'S MARKET SPENDING



\$13 billion (USD 9B)

Contribution to GDP sustained by the branded merchandise industry in 2025

Representing 0.4% of national GDP, or \$1 in every \$250 of economic activity



76,000

Jobs supported by the branded merchandise industry in 2025

Equivalent to 1 in every 280 jobs in Canada



\$4 billion (USD 3B)

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

Equivalent to \$240 per Canadian household

GDP IMPACT BY CHANNEL

Direct impact
\$4B (USD 3B)

+

Indirect impact
\$5B (USD 4B)

+

Induced impact
\$4B (USD 3B)

=

Total impact
\$13 billion (USD 9B)

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
30k generated

+

Indirect jobs
26k supported

+

Induced jobs
19k supported

=

Total jobs supported
76k

Of the 30k direct jobs generated by the industry

14k downstream jobs

6k midstream jobs

10k upstream 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).