

THE ECONOMIC FOOTPRINT OF BRANDED MERCHANDISE

Germany, 2025



GERMANY'S MARKET SPENDING



€13 billion (USD 14B)
Total branded merchandise
spending in Germany in 2025

German market spending accounted
for **4% of global spending on branded
merchandise products** in 2025.

Spending on promotional products
could make up **17% of spending
on advertising in Germany.**

Promotional products €6B (USD 6.4B)

Licensed merchandise €7B (USD 8B)

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 GERMANY'S MARKET SPENDING



€15 billion (USD 17B)
Contribution to GDP sustained
by the branded merchandise
industry in 2025

Representing 0.3% of national GDP, or
€1 in every €290 of economic activity



171,000

Jobs supported by the branded
merchandise industry in 2025

Industry directly generates more jobs
than the German extraction industry



€6 billion (USD 7B)
Contribution to tax revenues
supported by the branded
merchandise industry in 2025

Equivalent to €160 per
German household

GDP IMPACT BY CHANNEL

Direct impact
€6B (USD 7B)

+

Indirect impact
€5B (USD 6B)

+

Induced impact
€4B (USD 5B)

=

Total impact
€15 billion (USD 17B)

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
75k generated

+

Indirect jobs
54k supported

+

Induced jobs
42k supported

=

Total jobs supported
171k

Of the 75k direct jobs generated by the industry

37k downstream jobs

13k midstream jobs

25k 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).