

THE ECONOMIC FOOTPRINT OF BRANDED MERCHANDISE

Mexico, 2025



MEXICO'S MARKET SPENDING



\$81 billion (USD 4B)

Total branded merchandise spending in Mexico in 2025

Mexican market spending accounted for **1.2% of global spending on branded merchandise products** in 2025.

Promotional products \$32B (USD 2B)

Licensed merchandise \$49B (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 MEXICO'S MARKET SPENDING



\$165 billion (USD 9B)

Contribution to GDP sustained by the branded merchandise industry in 2025

Representing 0.5% of national GDP, or \$1 in every \$220 of economic activity



382,000

Jobs supported by the branded merchandise industry in 2025

Industry directly generates more jobs than the Mexican extraction industry



\$23 billion (USD 1B)

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

Equivalent to \$590 per Mexican household

GDP IMPACT BY CHANNEL

Direct impact
\$63B (USD 3B)

+

Indirect impact
\$66B (USD 3B)

+

Induced impact
\$36B (USD 2B)

=

Total impact
\$165 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
187k generated

+

Indirect jobs
134k supported

+

Induced jobs
62k supported

=

Total jobs supported
382k

Of the 187k direct jobs generated by the industry

19k downstr.

30k midstream

138k 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).

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