

THE ECONOMIC FOOTPRINT OF BRANDED MERCHANDISE

South Africa, 2025



SOUTH AFRICA'S MARKET SPENDING



R22 billion (USD 1B)

Total branded merchandise
spending in South Africa in 2025

South African market spending accounted
for **0.4% of global spending on branded
merchandise products** in 2025.

Promotional prod. R7B (USD 0.4B)

Licensed merchandise R15B (USD 1B)

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 SOUTH AFRICA'S MARKET SPENDING



R21 billion (USD 1B)

Contribution to GDP sustained
by the branded merchandise
industry in 2025

Representing 0.3% of national GDP, or
R1 in every R370 of economic activity



45,000

Jobs supported by the
branded merchandise
industry in 2025

Equivalent to 1 in every
380 jobs in South Africa



R5 billion (USD 0.3B)

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

Equivalent to R210 per
South African household

GDP IMPACT BY CHANNEL

**Direct impact
R6B (USD 0.3B)**

+

**Indirect impact
R9B (USD 0.5B)**

+

**Induced impact
R6B (USD 0.3B)**

=

**Total impact
R21 billion (USD 1B)**

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
9k generated**

+

**Indirect jobs
20k supported**

+

**Induced jobs
16k supported**

=

**Total jobs supported
45k**

Of the 9k direct jobs generated by the industry

4k downstream jobs

4k midstream jobs

Upstream

1k 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).