

TLL THE LICENSING LETTER

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TLL Survey: Fashion Licensing Grows 4.1% on Strength of Core Categories

With an increase of 4.1% in 2013, the growth rate for retail sales of licensed fashion merchandise in the U.S. and Canada was the second highest of all property types tracked in *TLL's Annual Licensing Business Survey*. The sector's growth rate exceeded those of the other four largest properties types (art, entertainment, sports, and corporate trademarks and brands), sometimes significantly, and was just slightly less than the 4.3% growth experienced by traditional toys/games.

All told, retail sales of fashion-licensed merchandise in the U.S. and Canada in 2013 exceeded \$19.6 billion, up from \$18.8 billion in 2012.

Market Drivers

The increases were driven by the core categories for fashion licensing, including apparel (up 4.8%), footwear (4.5%), accessories (4.5%), and health and beauty, including fragrance and cosmetics (4.3%).

One of the trends propelling fashion licensing forward during 2013 was the ongoing involvement of investment companies, such as Iconix and Authentic Brands Group, among others, purchasing fashion labels (both ongoing and defunct) and relying on licensing as a core strategy. In fact, they often immediately transition acquired labels into 100% licensed brands.

This trend is likely to continue. "A lot of brands are falling by the wayside and are available for sale, and they can come back through licensing," says one fashion executive. But he adds that overseeing a fully licensed brand comes with responsibilities. "Licensing now means managing the brand, with great partners, not just collecting revenues."

An agent agrees. "The pure licensing business model has been successful to date, but the long-term winners will be the companies that continue to market and promote the brand value and drive consumer demand," she says. "Lack of ongoing brand marketing and a true

brand vision is likely to result in brands becoming commoditized and losing value and appeal."

Aside from some labels' movement to an all-licensing model, other factors contributing to the strength of fashion licensing in 2013 included the fact that many fashion brands and designers, from Isaac Mizrahi and Vince Camuto to Diane Von Furstenberg and Michael Kors, expanded their licensing programs—including into new areas such as pet products, infant apparel, and personal electronics—and/or strengthened existing programs.

Continued on page 3

PRESHOW KICKOFF

NFL Players Inc. Co-Hosts TLL Preshow Breakfast in Vegas

NFL Players Inc. will co-host the annual *Licensing Letter* preshow networking breakfast in Las Vegas. The breakfast is a free event exclusive for subscribers to *The Licensing Letter* and takes place Monday, June 16, at the Luxor Hotel restaurant, Tender, 8:30 a.m.-10:00 a.m.

As the licensing and marketing arm of the NFL Players Association, NFLPI delivers access to the influence, power, and personal stories of NFL players. NFL Players Inc. is a "one-stop shop" helping hundreds of brands leverage the power of NFL players for more than 20 years.

"We are delighted to have NFL Players Inc. on our team to kickoff the *TLL* breakfast," says *TLL* Publisher/Executive Editor Ira Mayer. "The breakfast has become a wonderful low-key networking event where subscribers get to catch up with old friends and meet with potential new licensing partners before the show frenzy begins."

The NFL Players Inc. team looks forward to talking with *Licensing Letter* subscribers at

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➡ Licensing Ledger



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OSU KNOCKS SKREENED OFF THE PLAYING FIELD

A U.S. District Court judge has ruled in favor of **Ohio State University** on key issues in a lawsuit against online customizable apparel company **Skreened**.

OSU had accused the company of ignoring repeated warnings that it was selling unlicensed logos, images, and other trademarks related to the university, the Buckeyes, and coach Urban Meyer.

The court agreed, reports *Columbus Business First*, with Justice Gregory Frost writing in his opinion, "There is no exception in trademark law for infringers who take an ostrich approach to policing their business activities and complying with the law." The suit was filed in 2012.

If the ruling holds, other online print-on-demand companies that have claimed difficulty in monitoring what protected marks or designs people choose to imprint on products, regardless of whether they are licensed, will be hard pressed to pursue difficulty in monitoring as a defense against infringement.

"Selling knockoffs is selling knockoffs," the judge decreed, "regardless of who suggested you sell them, regardless of how many other infringing products you decide not to sell, and regardless of how much of a hassle it is to comply with the law."

STICKER HEIST

Though the World Cup doesn't kick off until June, the "celebration" in Brazil is already out of hand.

A van containing around 300,000 licensed **World Cup** stickers produced by licensee **Panini** was stolen last month while making deliveries to news agents. Football fans in countries such as Brazil and the U.K. obsessively collect World Cup stickers, to the point where both countries frequently feature television commercials advertising the stickers. Panini quickly reassured collectors and football fans that there will be no sticker shortage despite the theft. Panini got some great PR along with coverage of the heist, with links to classic images from the trading cards.

FOOTBALLS LICENSING MVPS

Seattle Seahawks quarterback Russell Wilson tops the **NFL Players Inc.** list of top 50 player sales at retail and online, based on products sold by more than 70 licensees. The Denver Broncos' Peyton Manning dropped to No. 2. The Top 50 players, NFLPI notes, generated

retail sales of licensed merchandise exceeding \$1 billion during the year from March 1, 2013, through Feb. 28, 2014. Find sports licensing stats across all the major leagues and sports organizations in the all-new *TLL Sports Licensing* report (see www.epmcom.com/sports).

(BE)WITCHING TREATS

Limited editions aren't limited to art and apparel. **Warner Bros. Consumer Products** is licensing **Dylan's Candy Bar** for a limited edition candy collection marking the 75th anniversary of *The Wizard of Oz* including chocolate bars of Dorothy, the Scarecrow, Cowardly Lion, and Tin Man, among other items.

AVENGERS ASSEMBLE FOR DISNEY INFINITY

Disney Infinity: Marvel Super Heroes is the upcoming **Marvel** edition of the Skylanders-like toy-powered **Disney Infinity** video game series. The game includes Captain America, characters from the upcoming *Guardians of the Galaxy* film, and other Marvel heroes. The game will retail for

approximately \$75 later this year and will include game accessories and figures of Thor, Black Widow, and Iron Man.

ENERGIZER SPLITS

Energizer Holdings plans to become two publicly traded companies during FY 2015. A household products company will focus on the Eveready and Energizer brands (represented for licensing by **Beanstalk**), while the personal care brands owned by Energizer Holdings (including Playtex, Banana Boat, and Hawaiian Tropic, which are represented for licensing by **Brandgenuity**) will operate separately.

A STYLISH WAY TO WASH

Limited-edition collaborations hit the body spray aisle with the introduction of a new "AXE Kilo With Paul Rodriguez" collection at Target. **AXE Kilo** men's body spray, antiperspirant, deodorant, body wash, and shampoo feature original artwork, inspired by pro skateboarder Paul Rodriguez (P-Rod) and created by tattoo artist and street-style illustrator Mister Cartoon.

ANGRY BUT FLYING

Angry Birds maker **Rovio** reports a 52% decline in its 2013 net profit, or €26.9 million compared to the prior year's €55.5 million. Almost half of 2013's revenues (47%) came from consumer products, helped in part by the company's expansion into "important Russian and Latin American markets." The company estimates that there have been more than two billion downloads of the various Angry Birds games so far.

BILLION DOLLAR KISS

Rock stalwarts **KISS** have generated retail sales of licensed merchandise totaling \$900 million over the last 40 years, according to the band. The band has licensed its name for over 3,000 items, according to a CNN clip promoting a KISS special on the network.

THE LICENSING LETTER (ISSN: 8755-6235) is published 22 times a year by EPM, a Division of Business Valuation Resources. The annual subscription price for THE LICENSING LETTER is \$489 per year/\$549 outside North America. Low-cost site licenses are available for those who wish to distribute this newsletter to their colleagues at the same firm. Please contact our business development department at rcochran@epmcom.com or 212-941-1633 ext. 18 for details.

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Fashion Licensing

Continued from page 1

In addition, the growth of fast fashion, retail-exclusive capsule collections, and collaborations with licensors in other property types were all positive forces in terms of fashion licensing in the key product categories.

A couple of factors helped put the brakes on even faster growth, however. There has been a trend in the last year or two of fashion licensors—especially the bigger houses—taking some of their formerly licensed categories (apparel and otherwise) in-house. Examples that had an impact on the business in 2013, in the U.S. and globally, include:

- ▶ Versace taking its underwear and beachwear collections in-house;
- ▶ PVH assuming control of its Calvin Klein apparel and accessories and Tommy Hilfiger tailored apparel; and
- ▶ Perry Ellis International internalizing its men’s accessories business.

Fashion designers and brands also are facing increasing competition from lifestyle labels originating outside the fashion industry. Some have established strong ongoing businesses, and others are newer but still able to successfully compete with traditional fashion labels for shelf space. Some of these brands include those tied to musicians, reality show stars, Hollywood stylists, athletes, and other celebrities.

Bright Spots and Hard Times

Products for the home also grew within the fashion licensing sector during 2013, albeit very slightly, across the board, including in domestics (up 1.1%), furniture/home furnishings (up 0.9%), and housewares (up 1.2%).

But the home sector is challenging for fashion licensors as a rule. “There are pools of strength, especially at the major players such as JCPenney, Kohl’s, and Bed Bath, and Beyond,” says a licensing executive at a fashion house. “At department stores, there are a few key players like Ralph

and Calvin. But for lesser-known brands, it’s very hard. It’s so heavily price-promoted. Home is tough.”

The collective product category labeled “Other,” which includes many emerging sectors—including personal electronics, gardening items, and pet products—saw impressive growth of 16.7% in 2013, but on a small base.

Categories showing declines were all less-than-core businesses for most fashion labels, including publishing, gifts/novelties, stationery/paper, and toys (mainly comprising fashion dolls). While certain designers and brands oversee strong businesses in some of these categories, in general, the sectors followed licensingwide downward trends.

“Made in USA,” a theme that has extended across property types, also affected fashion licensing in 2013. Not only are some fashion labels (e.g., in the workwear sector, for one) looking for opportunities to license companies that manufacture in the U.S., but also labels with a “Made in USA” halo can do well overseas. This is even true in certain cases where the core brand does not have extensive awareness in those countries. (Note: The numbers presented in this article focus on the U.S. and Canada markets only.)

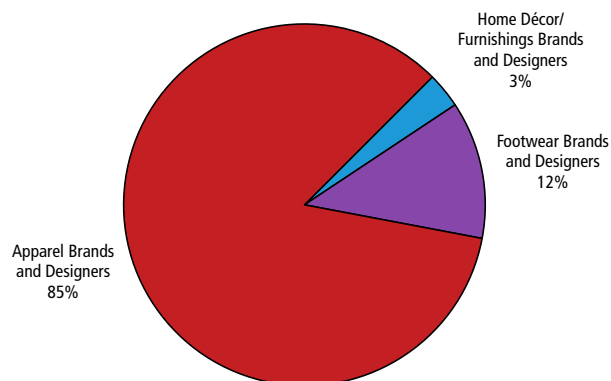
RETAIL SALES OF FASHION-LICENSED MERCHANDISE, 2012-2013, BY PRODUCT CATEGORY (FIGURES IN MILLIONS)

PRODUCT CATEGORY	RETAIL SALES, 2013	RETAIL SALES, 2012	CHANGE, 2012-2013	SHARE OF MARKET, 2013
Accessories	\$7,575	\$7,249	4.5%	38.5%
Eyewear	\$2,315	\$2,194	5.5%	11.8%
Handbags, Backpacks, Messenger Bags	\$1,092	\$1,029	6.1%	5.6%
Headwear	\$674	\$641	5.1%	3.4%
Hosiery	\$303	\$286	6.0%	1.5%
Jewelry and Watches	\$1,739	\$1,657	4.9%	8.8%
Luggage and Travel Accessories	\$710	\$679	4.5%	3.6%
Scarves and Ties	\$98	\$94	4.3%	0.5%
Other	\$644	\$667	-3.4%	3.3%
Apparel	\$6,079	\$5,801	4.8%	30.9%
Domestics	\$392	\$388	1.1%	2.0%
Footwear	\$1,417	\$1,353	4.7%	7.2%
Furniture/Home Furnishings	\$789	\$782	0.9%	4.0%
Gifts/Novelties	\$58	\$65	-11.5%	0.3%
HBA	\$2,499	\$2,396	4.3%	12.7%
Fragrance	\$2,076	\$1,995	4.1%	10.6%
Cosmetics/Nail Polish/Other	\$423	\$402	5.3%	2.2%
Housewares	\$310	\$306	1.2%	1.6%
Infant Products	\$323	\$322	0.3%	1.6%
Publishing	\$52	\$56	-6.6%	0.3%
Stationery/Paper	\$59	\$64	-8.9%	0.3%
Toys/Games	\$50	\$55	-8.5%	0.3%
Other	\$51	\$44	16.9%	0.3%
TOTAL	\$19,654	\$18,881	4.1%	100.0%

NOTE: Numbers may not add up exactly due to rounding.

SOURCE: THE LICENSING LETTER

RETAIL SALES OF LICENSED FASHION MERCHANDISE, BY TYPE OF BRAND OR DESIGNER, U.S. AND CANADA, 2013



SOURCE: THE LICENSING LETTER

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Fashion Licensing

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Sales of licensed merchandise through e-commerce represent another growth area, as is the case in other property types. Online-only retailers such as Amazon and Zazzle, for example, have become critical distribution channels for fashion-licensed merchandise. That is true internationally as well; e-tailers such as T-mall.com in China are helping labels establish themselves in that country.

Bricks-and-mortar retailers also are expanding their Web presence and collaborating with fashion licensors to do so. “We’re working a lot with our retailers to enhance their web product,” notes one large fashion licensor. “E-commerce on the part of our retailers helps amplify a brand’s presence. You can offer more products in more categories and give a greater sense of the breadth of the brand.”

Branding and Being Big

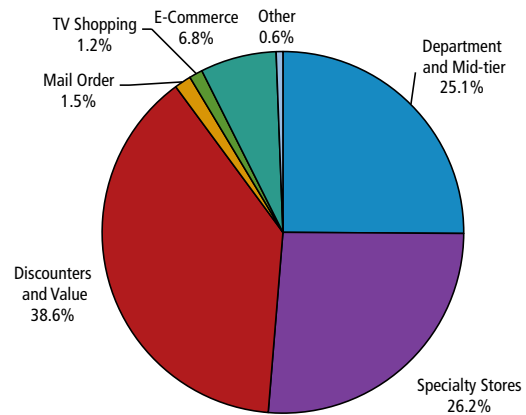
The importance of “authentic” brands, and their strength compared to private labels, came to the fore many times in the survey responses and interviews, both in the U.S. and Canada market and in other territories around the world.

“The continued consumer desire for authentic brands is consistent across the globe, as private label goods become more ubiquitous and therefore less unique in the eyes of the consumer,” says one multibrand fashion licensor. “Private label is at the point in its cycle where it has become known as opening price point merchandise. There’s not an emotional connection with a brand.”

But maintaining a strong and authentic brand takes work. “In this marketplace, great quality and great price are necessary, as is a well-thought-out marketing message,” adds another licensor. “We have a fickle consumer who wants fast fashion. You need a strong marketing message to stay relevant.”

In many ways, current market trends favor the bigger

RETAIL SALES OF LICENSED FASHION MERCHANDISE, BY DISTRIBUTION CHANNEL, U.S. AND CANADA, 2013
TOTAL = \$19.65 BILLION



SOURCE: THE LICENSING LETTER

fashion licensors. “There are fewer retailers, which gives us the opportunity to become a bigger resource for fewer stores,” says a large licensor. “It gives us the opportunity for a full lifestyle presence, beyond the core competencies.”

Similarly, the consolidation of brands leads to a landscape where a few big fashion companies own multiple brands and can dominate floor space. “With more properties in the hands of fewer companies, that means better business for each,” a licensor notes.

While all of that makes business ever more difficult for smaller fashion labels, there is room for new brands and new licensed lines that make sense in the marketplace. As one licensor says, “There’s always respect for creativity and room for something new, but there has to be white space that needs to be filled.”

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Licensing News

Properties Available Or Recently Assigned, U.S.

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
Aerosmith	Boston rock band known for lead singer Steven Tyler and guitarist Joe Perry, as well as a number of singles and albums.	All	Dell Furano, Epic Rights
Annoying Orange	YouTube viral sensation featuring the exploits of a talking orange and other talking fruit.	Accessories, amusement plush, apparel, backpacks, games, gifts, headwear, housewares, toys	Charlie Donaldson, Rocket Licensing
Christmas Wish (The)	Lori Evert and Per Breiehagen's book published by Random House.	Apparel, candy, figurines, gifts, linens, novelties, ornaments, outdoor items	Tim Rothwell, All-American Licensing & Management Group (AALMG)
Constellation Brands	Consumer products surrounding Constellation Brands Beer Division to be developed, including Corona Light, Modelo Especial, Negra Modelo, Pacifico, and Victoria.	Accessories, apparel, beverage, electronics, food, gifts, housewares	James Slifer, Joester Loria Group
Drexel University	Philadelphia-based university known for their Dragons teams and mascot Mario the Magnificent. Licensing representation lasts through 2019.	All	Cory Moss, Collegiate Licensing Co. (CLC)
Dwell Media	Owner of Dwell Magazine, the Dwell store, Dwell Digital, Dwell on Design events, and Dwell Homes Collection.	All	Ross Misher, Brand Central
Jeff Beck	Guitarist and songwriter known for his work with groups like The Yardbirds and The Jeff Beck Group.	All	Dell Furano, Epic Rights
Joan Jett	Musician known for her work with The Blackhearts and The Runaways.	All	Dell Furano, Epic Rights
Josephine Kimberling	Artist specializing in floral designs and other patterns.	All	Marty Segelbaum, MHS Licensing + Consulting
Little Couple (The)	TV series on TLC following Dr. Jennifer Arnold and Bill Klein.	Apparel, jewelry	Elan Freedman, Surge Licensing
Roshambo	Michael Dismuke's rock, paper, scissors hero comic.	Apparel, home decor, toys	Michael Dismuke, Gamemasters
Velvet Revolver	Supergroup containing former members of Guns N Roses (and formerly fronted by singer Scott Weiland).	All	Dell Furano, Epic Rights

Licenses Recently Granted, U.S.

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Ant Man, Avengers: Age of Ultron, Avengers Assemble, Captain America: The Winter Soldier, Hulk and the Agents of S.M.A.S.H.	JAKKS Pacific	Electronics	Disney Consumer Products
Arrested Development	FunKo	Vinyl figures	20th Century Fox Consumer Products
Buffy the Vampire Slayer	FunKo	Vinyl figures	20th Century Fox Consumer Products
David Tutera	Gibson Overseas	Housewares, tabletop	Brand Liaison (The)
DC Comics	Aquarius Entertainment Merchandising	Collectibles	Warner Bros. Consumer Products
Dead Space 3	ThreeA Toys	Collectible figures	Electronic Arts
Ford	Anna Sui	Limited edition apparel	Global Icons
	OPI	Nail polish	
Freddy Krueger	National Entertainment Collectibles Association (NECA)*	Figures	Warner Bros. Consumer Products
Game of Thrones	Museum Replicas	Collectibles, costumes, prop replicas	HBO
Garfield	Brush Buddies	Toothbrushes	Paws, Inc.
	Wicked Cool Toys	Master toy	Bulldog Licensing

*Extension or renewal.

Continued on page 6

Licensing News *Continued from page 5*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Godzilla	Diamond Select Toys & Collectibles	Minifigures	Toho Co.
	Fast Forward	Backpacks	Warner Bros. Consumer Products
	Thermos	Drinkware	
Goldbergs (The)	BioWorld Merchandising	T-shirts	Sony Pictures Consumer Products
	CafePress	Custom on-demand products including drinkware accessories, T-shirts, technology cases	
Hello Kitty	Chan Luu	Jewelry	Sanrio
	MAG Brands/Millennium	Outerwear	
Lately Lily	Chronicle Books	Activity kits, travel cards	Lately Lily
	MerryMakers	Dolls	
M&M's	Candyrific*	Candy accessories	Mars Retail Group
Mamasana	Enesco/Department 56	Jewelry, totes, tumblers	MHS Licensing + Consulting
MLB	OPI	Nail polish	MLB Properties
National Geographic	Live Prepared dba Blue Chip Group	Emergency items, emergency rations	National Geographic Society
NFL Players Incorporated	FBF Originals/For Bare Feet	Footwear accessories, socks	NFL Players
	MasterPieces Puzzle	Puzzles	
	New Era Cap*	Headwear	
	Original Retro Brand*	T-shirts	
Paddington Bear	Trend Lab	Accessories, bedding	Copyrights Group (The)
Pepsi	Del Toro	Footwear	Joester Loria Group
	Gents Co.	Headwear	
	Perry Ellis International/PEI Licensing	Apparel	
Pete the Cat	Wonder-Shirts	T-shirts	MerryMakers
Phil Marden	Solid Line Products	Phone accessories	Phil Marden
Real Simple	Cuyana	Accessories, apparel	Time Inc.
Robert Graham	Barton Como	Jewelry	Robert Graham
Scream	National Entertainment Collectibles Association (NECA)	Collectible dolls	Evolution
Star Wars	Vans	Footwear	Disney Consumer Products
Ultimate Fighting Championship	Antigua Sportswear	Apparel	Ultimate Fighting Championship/Zuffa
Where's Waldo?	Praim Group*	Chocolate bars	DreamWorks Animation
Wizard of Oz (The)	Dylan's Candy Bar	Candy	Warner Bros. Consumer Products
Wonder Woman	ICUP*	Aprons	Warner Bros. Consumer Products
	Junk Food Clothing*	Apparel	
	Lauren Moshi*	Pullovers	
	Under Armour*	Performance apparel	
	Vandor*	Tote bags	

International Properties Available or Recently Assigned

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
A-Z	British map publisher for over 75 years.	Accessories, bags, car accessories, games, gift items, greeting cards, housewares, puzzles, stationery, travel accessories, wrap (U.K.)	Charlie Donaldson, Rocket Licensing
AC Milan	Italian football club known for 18 UEFA and FIFA titles.	Apparel, back-to-school, electronics, games, gifts, home furnishings, housewares, novelties, personal care, sporting goods, stationery, toys (India)	Jiggy George, Dream Theatre
Badland	Game from Finnish developer Frogmind. Products program will be created in conjunction with 5th Wave Bands.	All (U.K.)	Daniel Amos, Tinderbox div. Beanstalk (U.K.)

*Extension or renewal.

Continued on page 7

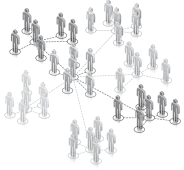
Licensing News Continued from page 6

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
Deep Silver Games	Video games Saints Row and Dead Island, which recently released sequels for console and computer platforms.	Accessories, apparel, collectibles, posters (U.S., Canada)	Vicky Hill, Bulldog Licensing
DHX Media properties	Teletubbies and In the Night Garden available for licensing. UYoung Media Group also represents In the Night Garden in China for licensing.	All (China)	Nancy Chan, BBC Worldwide Hong Kong
DreamWorks Animation	Includes Dreamworks Animation properties. CPL already represents DreamWorks for Bolivia, Colombia, Chile, Ecuador, Peru, Venezuela, and Mexico.	All (Brazil)	Herbert Greco, Compañía Panamericana de Licencias
Flappy Bird	iOS/Android game created by Dong Nguyen, which lets players move a bird around obstacles.	All (U.K.)	Francesca Lisle-Grimshaw, Lisle Intl. Licensing
Subway Surfers	SYBO Games and Kiloo Games' mobile game featuring graffiti artists fleeing a security guard and his guard dog.	All (Greece, Italy)	Ignacio Segura de Lassaletta, Planeta Junior (Spain)
		All (Andorra, France, Iberia)	Jordi Rey, Biplano Licensing SA
		All (Turkey)	Diana Magarino, Max Licensing
		All (Latin America (excluding Brazil))	Elias Fasja Cohen, Tycoon Enterprises
Wissper	Absolutely Cuckoo and Telegaël co-produced CG-animated TV show.	All (Worldwide)	Hans Stoef, m4e AG
YO-Kai Watch	Japanese animated series also featured in Shogakukan Monthly CoroCoro Comic Magazine and airing on TV Tokyo.	All (North America, Central America, South America)	Doug Fidoten, Dentsu America

International Licenses Recently Granted

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
A-Z	B.M. Fashion Ltd. t/a Fashion U.K.	Accessories, daywear, nightwear, underwear (U.K.)	Rocket Licensing
	Smiffy's	Dress-up (U.K.)	
Battersea Dogs & Cats Home	Shreds	Aprons (U.K.)	Battersea Dogs and Cats Home
Cake Boss	Single Cup Coffee	Single-cup coffees (U.S., Canada)	Discovery Communications
Dumb Ways to Die	GB Eye Ltd.	Badges, bracelets, canvas wall art, framed photographs, magnets, mugs, posters, prints, stickers, temporary tattoos (U.K.)	Evolution
Garfield	Lazy Oaf	Dresses, jeans, shorts, swimsuits, T-shirts (U.K.)	Bulldog Licensing
	Sambro Intl.	Backpacks, puzzles, stationery, trolley bags (U.K.)	
It's a Wild Life	VMC Accessories	Accessories, bags, eyewear, globes, hats, scarves (U.K.)	Bulldog Licensing
	Yoofiti	Wall art (U.K.)	
Jarritos	Star Candle	Candles (U.S., Mexico)	IMG Worldwide
Max & Ruby	Imports Dragon*	Plush (North America)	Corus Entertainment/Nelvana Enterprises
Monster High	VMC Accessories	Belts, earmuffs, gadget accessories, gloves, headwear, scarves, sunglasses (U.K.)	Mattel UK Ltd.
Original Penguin, Perry Ellis	Parigi Group	Apparel (children's), sportswear (children's), swimwear (children's) (U.S., Canada)	Perry Ellis International/PEI Licensing
	Educa Borrás SA	Construction toys, puzzles (Iberia)	
Pac-Man and the Ghostly Adventures	Sambro Intl.	Bags, stationery (U.K.)	Lisle Intl. Licensing
	Van der Erve NV	Apparel (Benelux)	J&M Brands
	KiddyRides	Amusement rides (U.K.)	Lisle Intl. Licensing
Planes	Cartamundi U.S.A.	Games (U.K.)	Disney Consumer Products
Shaun the Sheep	Cooneen Group	Nightwear, underwear (U.K.)	Aardman Animations
	Smiffy's*	Dress-up (U.K.)	
Smiley Brand	Herlitz PBS AG	Back-to-school (Germany)	Smileyworld
	Stationery Team Europe BV*	Back-to-school (Netherlands)	
Union J	Vivid Imaginations*	Figurines, games, key chains (U.K.)	SyCo Entertainment
Wall's Funny Feet	Airpure	Air fresheners (U.K.)	Unilever UK
Wolfblood	B.M. Fashion Ltd. t/a Fashion U.K.	Nightwear, underwear (U.K.)	Bulldog Licensing
	Danilo Promotions Ltd.	Calendars, greeting cards (U.K.)	

*Extension or renewal.



contacts & connections

Contacts & Connections is an alphabetical listing of the licensing companies in this issue.

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Magazine Publishers Use Licensing to Bolster Brands in Uneasy Times

The recent news that the 131-year-old *Ladies Home Journal* is transitioning from a monthly subscription magazine to a newsstand quarterly underlines the dire straits magazines find themselves in yet helps explain the continued burst of new and expanding licensing programs based on magazine brands.

We have covered this topic often in this newsletter and in the accompanying blog, RaugustOnLicensing (at www.epmcom.com/raugustonlicensing). But the number of deals just in the last two months—and the diversity in the way magazine publishers are using licensing to extend their brands—is startling:

- ▶ Time Inc. licensed *Real Simple* to Cuyana for a Cuyana for Real Simple apparel range, with four collections planned over the next year. This marks the first entry into apparel for the publication, whose other licensees include Bed Bath & Beyond and Finestationery.com. The company also teamed with retailer Dillard's for a *Southern Living* collection of bed, bath, tabletop, and home accessories.
- ▶ Hearst paired with Sears for a *Seventeen* apparel line to be sold in branded shop-in-shops in more than 500 stores. The "Seventeen" name has been in the bedding market for well over a decade.
- ▶ *Forbes* and its agent LMCA signed deals with Paradises for licensed airport newsstands and Lotaris for a mobile payment service.

Who's News

James Fielding joins AwesomenessTV as global head of consumer products and retail. Fielding was previously CEO for Claire's and president of Disney Stores Worldwide.

Alison Moore joins NBCUniversal as GM/EVP of the company's TV Everywhere endeavors. Moore will work within the company's Content Distribution Group. Moore recently served in a similar capacity at the now-defunct Daily Candy and was previously at HBO.

Aleka Mazarakis joins EisnerAmper LLP as a senior manager in the Royalty Audit and Contract Compliance Group, managing licensing royalty compliance audits and providing valuation and financial due diligence services. She previously had a similar role at Prager Metis.

Karen Bonck is named SVP branded partnerships at Debmar-Mercury. Bonck will be responsible for branded content and advertiser partnerships for "The Wendy Williams Show" (produced and distributed by Debmar-Mercury) and the upcoming fall 2014 entry "Celebrity Name Game" (co-produced and co-financed by Debmar-Mercury and FremantleMedia North America, and distributed domestically by Debmar-Mercury). Bonck previously held branded entertainment posts at both NBC Universal and Disney ABC Television Group.

Nicole Armentrout is named senior director, marketing at the Collegiate Licensing Company (CLC), to develop consumer and retail marketing programs for licensees and client institutions. Armentrout was previously with Eric Mower and Associates (EMA).

- ▶ American Express Publishing and licensee Gorham debuted a line of *Food & Wine* dinnerware, bakeware, glassware, and flatware. The dinnerware sets are packaged with *Food & Wine* recipes. The magazine has overseen other product lines in the past, as well as offering a branded wine club and other experiential initiatives.
- ▶ Entrepreneur Media retained The Blake Project as its agent for a licensing program tied to *Entrepreneur* magazine, which has established businesses in books, events, and content publishing.

Meanwhile, *WWD* reports a rumor that Condé Nast's *Bon Appétit* was in talks with Amazon Fresh about an e-commerce partnership. *WWD* described the results of the magazine's kitchenware-related licensing deal with HSN, which ran from 2012 to 2013, as "somewhat unremarkable."

Kids in the Kitchen: Bakeware Is Cookin'

Bakeware has been a growing category for licensing in the last couple of years, especially in the U.S. and U.K. markets, as celebrity bakers, food brands, and other property types add licensees for cookie sheets, cake pans, baking accessories, and more.

Recently, the kids' portion of the market is starting to pick up. Discovery Communications expanded its 400-SKU Cake Boss license with Meyer Corp. to add a 25-item line of Cake Boss Jr. bakeware and accessories for kids. And Mindscreen licensed Moshi Monsters to Click Distribution for bakeware, including silicone molds, mixing bowls, cookie cutters, whisks, and more, for distribution in U.K. toy retailers, department stores, supermarkets, and e-commerce sites.

Of course, baking lines have been targeted to children in the past:

- ▶ Williams-Sonoma sells an exclusive range of cookie cutters and cake molds tied to Star Wars and previously had a line tied to Marvel, as did Pottery Barn, supplied by Nordic Ware;
- ▶ Wilton has produced cake pans tied to many characters, from Disney Princess and Monster High to SpongeBob and Thomas & Friends, along with accessories such as candles, paper baking cups, cookie cutters, cake toppers, treat bags, and the like (not to mention collegiate items for the "older kids"); and
- ▶ Hello Kitty has licensed a number of companies for bakeware, including Wilton for cake pans, as well as Meri Meri for baking gift sets and Siliconezone for silicone cake molds, baking mats, and rolling pins.

But most of these deals encompass one-off or just a few bakeware items. The Cake Boss Jr. and Moshi Monsters examples may signal more comprehensive children's baking ranges to come. And, perhaps, the Cake Boss Jr. line may foreshadow the entry of more chefs into this character-dominated sector.

Online Shopping for TV Viewers Boosts Fan Engagement

Retailers and licensors are experimenting with new ways to merge TV viewing and online shopping.

Target's click-to-buy promotion with the TBS show "Cougar Town," in March, allowed viewers to use their smartphones or tablets to click on merchandise seen on the show and purchase it at Target.com in real time.

In January, meanwhile, H&M ran an ad aimed at viewers who were watching the Super Bowl on a Samsung smart television; they were able to purchase David Beckham's bodywear during a 30-second TV spot, with Delivery Agent handling orders and fulfillment.

Past examples have connected shopping and TV viewing, albeit less directly. Late last year, for example, HSN and Univision formed Boutique Univision to curate and sell products with appeal to Hispanics. The intent is to offer the merchandise on HSN, with Univision's morning news show, "Despierta America," serving as a promotional and product-integration platform. Merchandise to be featured includes licensed goods tied to Coca-Cola, G by Giuliana, Vince Camuto, and Wolfgang Puck, among others.

And back in 2011, CBS Consumer Products launched a line of Jabot cosmetics, tied to the fictional company at the center of "The Young and the Restless."

While these examples illustrate the convergence of product placement and home shopping, the Target and H&M examples take fan engagement to the next level when it comes to interactivity and immediacy.

Original Online Productions Spur Offline Licensing Programs

In the last year or so, producers of children's programs large and small have been finalizing digital distribution deals with the likes of Netflix, Amazon Prime, Hulu, and many more, both in the U.S. and abroad.

The trend began with library titles—which still represent by far the bulk of activity—but has expanded to include an increasing number of digital-first productions. Some of the latter are even starting to spur limited licensing efforts.

The largest merchandise ventures, as would be expected, are tied to online originals based on established franchises. WWE and Mattel, for example, launched the 26-episode short-form series "WWE Slam City" in March; it is distributed on WWESlamCity.com and YouTube's Cartoonium channel, as well as through almost a dozen other digital distribution sites. A full merchandise program, including toys, apparel, back-to-school, books, and graphic novels, accompanied the debut, to be followed by a wider array of products in 2015.

Meanwhile, DreamWorks' "TurboFast" series, based on the feature film *Turbo* and distributed on Netflix as part of a broader distribution deal, has a digital gaming license with Pikpok. Non-franchise-based examples are starting to emerge as well:

- ▶ Henson's "Chatter Zoo," a series of "interactive appisodes" produced by Mindshapes, premiered last summer, with a deal already in place with Sassy for infant toys and plush. Henson also has licensing plans for the "Doozers," a Hulu original that is a spin-off of "Fraggle Rock."
- ▶ Frederator Studios' "Bravest Warrior," from Adventure Time creator Pendleton Ward, airs on YouTube's Cartoon Hangover channel and has Perfect Square on board for a series of books.
- ▶ PBS Kids' online series "Fizzy's Lunch Lab," which focuses on food and nutrition, is featured in books from Candlewick Entertainment, launching this spring.

PREPPING FOR LICENSING EXPO

New TLL Data and Contacts Help You Present the Best Licensing Case

New editions of key titles in EPM's library of licensing resources will be available over the coming weeks to help you prepare for Licensing Expo. By ordering now, you can be assured of receiving each of these valuable resources as soon as they're complete.

Among the licensing-specific titles being released in all-new editions are:

- ▶ *Royalty Trends Report*. Use 10-year trend lines and sector-by-sector analysis to structure deals that foster genuine partnerships between property owners and manufacturers. Includes JPGs for all graphics ready to drop into your proposals, reports, and presentations. \$379 (\$279 for TLL subscribers). Available now.
- ▶ *Sports Licensing Report*. Join the winner's circle in the \$18.8 billion global sports licensing business. This in-depth profile of the major leagues and sports organizations reveals retail, online, and concession sales breakdowns; product breakdowns by sport; and contacts for more than 200 key licensees. \$449 (\$399 subscribers). Available June 1.
- ▶ *Licensing Business Databook*. Seventy-seven charts, graphs, and tables spotlight retail sales by property type, product category, and distribution channel, with estimates of worldwide licensing by territory. Free JPGs of each graphic are ready for your budgeting, financing, and new business plans. \$795 (\$695 subscribers). Available June 1.
- ▶ *Licensing Letter Sourcebook*. Find the phone, email, and mailing addresses for more than 4,400 licensing decision-makers. Learn who owns or represents a property, who manufactures merchandise (and what they make and which licenses they hold). Available in print or as a searchable database. \$469 (\$419 subscribers). Out June 17.
- ▶ *International Licensing: A Status Report*. Develop new market entry strategies or fine-tune existing arrangements with this completely revised 8th edition featuring retail sales estimates for licensed merchandise in 49 countries. \$2,995 (\$2,695 subscribers). Out June 17.

Also new from EPM — a division of Business Valuation Resources—are two annual references with a wealth of consumer data: *Research Alert Yearbook* and *All About Women Consumers*.

Contact Randy Cochran at randyc@bvresources.com or 212-941-1633 ext. 18. He can help you assemble a package of EPM reference works that will help you maximize your participation in Las Vegas next month and in your licensing business throughout the year.

EDITOR'S LETTER

Is Russia Still on Your BRIC Itinerary?

What are the prospects for American and European brands' licensing programs in Russia, given the current political climate? Last year, retail sales of licensed merchandise in Russia were up 6.1% to \$310 million in 2013 from 2012, according to *The Licensing Letter's International Licensing: A Status Report* (8th edition to be available next month).

Russian President Vladimir Putin called last month for the creation of a Russian fast-food operation to rival McDonald's. That may have been the more lighthearted of comebacks to U.S. and European sanctions, but Russia seems less than welcoming at the moment.

Meanwhile, the American government has suggested that U.S. CEOs not attend an annual economic conference Putin hosts in Russia—and, while some are sending more junior executives, most appear to be complying in not sending top-tier officials.

From a licensing perspective, some American-born evergreen properties have developed local reputations outside the U.S. that are so strong that the host country thinks the characters are theirs (Sesame Street in Israel and other markets, for example, or Arnold Palmer in Japan). But would anyone anywhere think Disney/Marvel/Star Wars isn't American? What about Tommy Hilfiger or Calvin Klein? Harder to say.

There's some encouragement to be found at the grass-roots level in a WWD story about fashion brands. "My friends and I love American brands," 21-year-old Sergei Lutsatto told WWD as he was leaving a Gap store in Russia. "Even if war broke out, I don't think they would be less popular."

Lutsatto is representative of others the paper spoke with. "Still, Western brands are nervous, with both Hermès and Karl Lagerfeld admitting that they are keeping a wary eye on the situation," the report says.

Our take: Disney has a firm foothold, and Fox's Ice Age is a bigger merchandising success in Russia than in the U.S. And, of course, local properties are looking to edge out the foreigners, with Masha the Bear probably the prime example on the preschool front.

One has to wonder, though, just how far American brands will be willing to push in the current environment—and the degree to which that opens the way for more homegrown properties now that retail in Russia is beginning to recognize the value of licensed goods.

NFL Players Inc.

Continued from page 1

the breakfast about some ideas to partner with our strong group of current NFL players," says Steve Scebelo, NFLPI VP licensing and business development. "We're excited to share more about our 'one-stop shop' approach and how it has helped our partners improve their businesses while learning about the challenges our potential partners are facing. *The Licensing Letter* Special Projects Editor Karen Raugust and Mayer will give a short presentation on global licensing trends based on the all-new 8th edition of *International Licensing: A Status Report*.

Subscribers who wish to attend should email karina@epmcom.com with the names, titles, direct phone, and emails of those attending.

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