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TLL THE LICENSING LETTER

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TLL Survey: Global Retail Sales of Licensed Merchandise Up 1.7% in 2013

Global retail sales of licensed merchandise totaled more than \$155.8 billion in 2013, according to the just-released eighth edition of *International Licensing: A Status Report* and based on *TLL's Annual Licensing Business Survey*. That figure was up 1.7% from \$153.2 billion in 2012.

The U.S. and Canada were responsible for much of this increase, with retail sales in those markets rising 2.2% in 2013 to nearly \$97.5 billion. Together, the U.S. and Canada accounted for a 62.5% share of the total global market in 2013, up slightly from 62.2% in 2012.

In terms of percentage growth, the Middle East and Africa grew the fastest (on by far the smallest base), rising 4.5% in 2013. Central and Eastern Europe (led by Russia) followed with an increase of 4.3%, Latin America (led by Brazil) with 3.3%, Asia (led by China) with 3.2%, and Australia/New Zealand with 2.0%.

In Asia, the growth rate was tamped down by a rise of just 0.2% in Japan, the biggest and best-established territory in the region. This tempered strong increases of 9.2% in mainland China and 3%-plus in most other Asian countries. On the plus side, however, Japan's slight increase was the first sign of recovery in many years for retail sales of licensed goods in that country. Sales had long been falling due to poor economic conditions combined with a mature and crowded licensing landscape.

Europe's Struggles Continue

The only region to see a decline in retail sales was Western Europe, which watched sales of licensed goods drop .9% compared to 2012. The decline was attributable to ongoing macro-economic challenges across the region, combined with mature licensing markets in many Western European countries.

The territories that continue to be hardest hit include Italy, Spain, Portugal, and Greece, all of which were heavily challenged in 2012 as well as in 2013. In 2013, France joined the list, with retail sales of licensed goods falling 3.8%.

RETAIL SALES OF LICENSED MERCHANDISE, WORLDWIDE, BY TERRITORY, 2012-2013

TERRITORY	RETAIL SALES, 2013	RETAIL SALES, 2012	% CHANGE, 2012-2013	SHARE OF MARKET, 2013
U.S. and Canada	\$97,471	\$95,366	2.2%	62.5%
Western Europe	\$31,250	\$31,541	-0.9%	20.1%
Central and Eastern Europe	\$632	\$606	4.3%	0.4%
Asia	\$18,820	\$18,241	3.2%	12.1%
Australia and New Zealand	\$2,278	\$2,233	2.0%	1.5%
Latin America	\$4,122	\$3,990	3.3%	2.6%
Middle East and Africa	\$861	\$824	4.5%	0.6%
Other	\$398	\$403	-1.4%	0.3%
TOTAL	\$155,832	\$153,205	1.7%	100.0%

NOTE: Retail sales in millions of U.S. dollars. Numbers may not add up exactly due to rounding.

SOURCE: THE LICENSING LETTER

Some northern territories, including the Benelux countries, also suffered to a degree (with the Netherlands down 2.3% and Belgium down 1.1%), while most others were flat to slightly up. The U.K., despite continued softness in its overall economy, was a bright spot. Its con-

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NICHE LICENSING

Instagram, Pinterest Celebrities Join Digital-Origin Properties

The landscape of digital-origin properties available for licensing has evolved and diversified over the last two years. First came virtual worlds (e.g., Moshi Monsters) and mobile apps (Angry Birds, Cut the Rope), then DIY YouTube properties (Annoying Orange, Grumpy Cat). Then came blogs (Bag Snob), Twitter feeds (@IQuoteForHer), commercially developed digital-first programming (Bravest Warriors), and digital avatars (LINE Friends).

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in short

NY, Knicks, Yankees, Mets, and Jets house keys are \$2.98 each at Home Depot in Brooklyn, NY, while Mickey, Cars, and other Disney property keys are \$3.98.



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Licensing Ledger

LICENSED—NOT

Four examples of different, what appear to us legitimately, NOT licensed products/lines that we've seen recently:

1. LEGO-looking Cooking Blocks utensils. There's a bottom piece the spatula, serving spoon, and slotted spoon attach to. The handles are primary color LEGO-like building blocks. No patent on building blocks, so this is clear.
2. Northern Comfort maple syrup, from Maple Grove Farms of Vermont, uses a similar type face, type style, and bottle shape in a parody of Southern Comfort, the bourbon-based alcohol.
3. ChocStars chocolates in the image of Michael Jackson, Audrey Hepburn, the Blues Brothers, etc. The disclaimer, from Pets Rock licensor Takkoda, reads, "These are real pets, not real celebrities. The well-known individuals have not had any involvement in the creation of the images and they have not approved them, nor has their approval been sought for the publication of these images." So while Takkoda protects its images of the "pet celebrities," it is not itself a licensee.
4. Books parodying the classic *Good Night Moon*, including *Good Night Brooklyn*, *Good Night New York City*, and others.

LICENSE IN A LICENSE

Nike and **2K Sports** will offer a special version of Nike's LeBron 11 sneaker to select players of 2K's *NBA 2K14 game*. The sneaker, limited to 2,014 pairs, will be made available to players completing certain in-game achievements; only then will they be able to order the LeBrons for \$220. *NBA 2K14* includes LeBron James, the sneaker's namesake, as well as in-game Nike branding and activities.

FROZEN ON ICE

Disney's live show licensee **Feld Entertainment** will bring its 34th Disney On Ice tour to cities later this year, featuring characters, songs, and storyline from *Frozen*. The tour, set to start in September, will also feature Mickey, Minnie and several other characters from the Disney kingdom retelling the story from the film. Meanwhile, *The New York Times* gushes about *Frozen's* success in merchandise: "With stores across the country sold out of the most coveted merchandise...While brawling over the last must-have toy on the shelf is hardly unprecedented,

'Frozen' is taking the madness to another level."

WILLIAM RAST IN DTR

William Rast, the fashion brand founded by Justin Timberlake and business partner Trace Ayala, and owned/licensed by **Sequential Brands Group**, will debut in Lord & Taylor stores in the U.S. in fall 2014. The brand will have both men's and women's offerings. Available at Canadian department store The Bay since fall 2013, and currently rolling out in Europe across multiple retailers, licensees include **FDJ French Dressing**, **Peerless**, **PVH**, **Gold Medal**, and **RGA Leatherworks**.

SANRIO TO RELY LESS ON LICENSING

Sanrio's stock price dropped 16% after the company announced that it will be opening more retail stores, and moving away from its reliance on licensing. Analysts cited by *Bloomberg* note that licensing puts the onus of risk on the manufacturer, not the property owner, in this case diminishing projected profitability. "Opening up stores,"

the news service quotes Edwin Merner of **Atlantis Investment Research** saying, "you could lose a lot of money." The analysts also point to Sanrio's dependence on one character. "They've done so much with Hello Kitty that what they can still do is limited," says Amir Anvarzadeh of **BGC Partners**.

BAKIN' WITH THE KIDS

The popularity of baking shows among kids in the U.S. and the U.K. sees the kids' portion of the licensed bakeware market starting to pick up. Among the recent deals: **Discovery Communications** expanded its 400-SKU **Cake Boss** license with **Meyer Corporation** 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.

WHO'S NEWS

Naz Cuevas is promoted to EVP Global Consumer Products Licensing at Rovio. Joining Rovio are **Randi Spieker** as VP Licensing and Retail, North America; **Joe Lawson** as VP Licensing and Retail for Asia Pacific & Latin America; and **Paul Bufton** as VP Licensing and Retail for EMEA.

Tessa Moore is promoted to SVP Global Brand Management at FremantleMedia Kids & Family Entertainment, with **Caroline High** upped to Senior Licensing Manager, U.K. Both are part of a restructuring whereby four territory heads (U.K., EMEA & Australia, the Americas, and Asia) will report directly to EVP/GM **Rick Glankler**. **Carl Lumbar**, who had been global head of licensing, is leaving the company.



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Global Licensed Merchandise Sales

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sumers went back to purchasing licensed goods in 2013, leading to growth of 3.5% over 2012.

Meanwhile, Turkey's increase in retail sales of licensed goods (5.1%) continued to outstrip the performance in other countries, thanks to a continued strong economy, growing interest and activity from licensors and licensees inside and outside Turkey, and the country's strategic role as a hub for sales of licensed goods, domestically and in Central and Eastern Europe and the Middle East.

Turkey remains a relatively small territory for retail sales of licensed goods, however, especially on a per-capita basis. In addition, its growth rate declined slightly from 6.4% in 2012.

Sports, Fashion Lead the Way

Retail sales in all five of the largest property types grew in 2013, with sports ahead at 3.1%.

That upsurge was driven in part by the ongoing expansion of the major U.S. leagues internationally, but also by strong growth for football/soccer teams globally, as well as for clubs in other sports, such as rugby, cricket, and basketball. Several of the football clubs with the strongest merchandising programs, especially in the U.K. and Europe, have been expanding around the world, while a large number of clubs in all sports are launching licensing programs or increasing their licensing activities in their home countries.

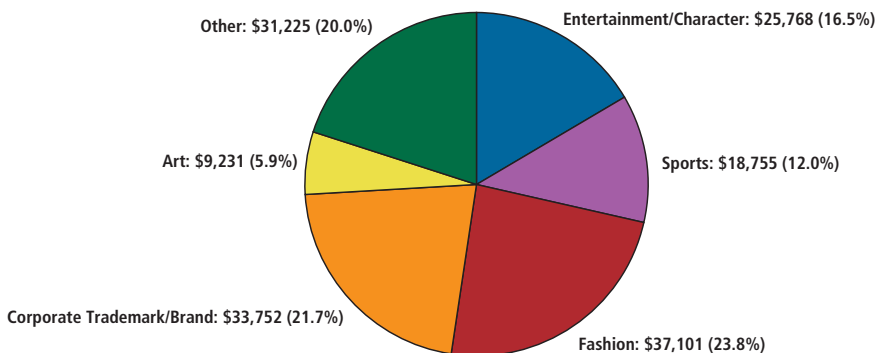
This growth in sports licensing occurred even without significant global sports events occurring in 2013; that will change in 2014 with several big global sports gatherings on the schedule, including the FIFA World Cup in Brazil.

The second fastest-growing property type in 2013 was fashion, in which retail sales of licensed goods increased 2.5% globally. That boost was driven mostly by increased activity by the major

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RETAIL SALES OF LICENSED MERCHANDISE, BY PROPERTY TYPE, WORLDWIDE, 2013

Total = \$155.8 Billion

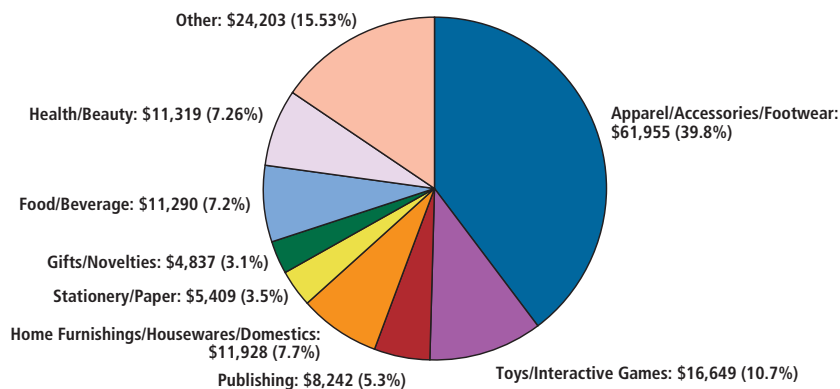


NOTE: Retail sales in millions of U.S. dollars. Numbers may not add up exactly due to rounding.

SOURCE: THE LICENSING LETTER

RETAIL SALES OF LICENSED MERCHANDISE, BY PRODUCT CATEGORY, WORLDWIDE, 2013

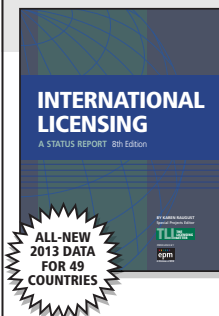
Total = \$155.8 Billion



NOTE: Retail sales in millions of U.S. dollars. Numbers may not add up exactly due to rounding.

SOURCE: THE LICENSING LETTER

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Global Licensed Merchandise Sales

Continued from page 3

U.S. and European global fashion houses around the world, with Asia a particular focus, especially for luxury brands. More fashion labels from around the world also are increasing their licensing activity in local markets worldwide.

The art sector saw an increase of 1.8% globally, a reversal from a decline of 1.9% the previous year. Growth outside the U.S. and Canada outpaced that inside those two countries, where retail sales of art-licensed goods were up just 1%. The global rise was propelled more by local activity from art licensors around the world than by global expansion, although some artists have strong programs outside their own borders.

Entertainment/character experienced expansion of 1.4% in 2013, also representing a turn-

around from 2012, when retail sales declined .8%. This growth is attributable to strength around the world on the part of key licensors such as Disney, Warner Bros., DreamWorks, Fox, Cartoon Network, American Greetings, and others, as well as to the growth of local properties that are launching successful licensing programs in their own countries and sometimes abroad.

Corporate trademarks and brands saw the slowest global growth rate of the major property types, at 1.8%, still ahead of the 0.7% growth it experienced in 2012. Historically, the U.S. and Canada have powered this sector, but in 2013 other pushed much of the growth. In fact, the sector was up just 0.8% in the U.S. and Canada. Global increases were attributable both to international expansion on the part of U.S. brands and to local and global activity by brands in territories around the world. Examples range from European car brands to Asian electronics brands.

Bull Markets for Food and Fragrance

Food/beverage was the fastest-growing licensed product category globally in 2013, rising 6.7%. The U.S. and Canada drove most of the increase, as has been the case for several years, due to brand extensions tied to food and restaurant brands. But other territories also saw growth in this sector, notably the U.K., which has seen strong sales in licensed foods and beverages connected to restaurants and chefs, among other properties.

Sales of licensed health and beauty products climbed 3.4% in 2013, propelled by continued strength in licensed fragrances, in which the best-performing examples—those based on fashion labels and some celebrities—are global businesses. Cosmetics and nail polishes also saw increases, particularly in the U.S. and Canada. That territory, with a collective sales increase of 4%, grew faster than the world as a whole in the health/beauty category.

On the other end of the spectrum, the categories seeing declines in sales of licensed merchandise globally included stationery/paper (down 4.7%), gifts/novelties (3.9%), publishing (3.4%), and toys/interactive games (.8%).

None of these declines was wholly unexpected, given that these are the categories that are driven by impulse purchasing and therefore most affected by economic downturns, and/or are those affected most by the transition to digital technologies. In the latter case, digital technologies are either depressing sales as a whole (as is the case with stationery) or causing a disruption in business models (as with toys, interactive games, and publishing).

BRIC: STILL STRONG, BUT SLOWING

The BRIC countries (Brazil, Russia, India, and China) continue to experience growth in retail sales of licensed goods that outshines most other individual nations according to the just-released eighth edition of *International Licensing: A Status Report* and based on *TLL's Annual Licensing Business Survey*:

- ▶ China rose the fastest of the four in 2013, with an increase of 9.2%, just ahead of the 9.1% increase it saw in 2012. The country's general economic growth (as measured in GDP) fell from 7.8% in 2012 to 7.6% in 2013, however.
- ▶ India's sales of licensed merchandise rose 8.3% in 2013, versus 6.9% in 2012. Meanwhile, GDP growth was 3.8% in 2013, down from 6.5% in 2012.
- ▶ Russia's retail sales of licensed goods were up 6.1% in 2013, compared to 8.1% in 2012; the overall economy grew just 1.3% in 2013, versus 3.4% in 2012.
- ▶ Brazil's rate of increase slowed, with retail sales of licensed goods up 2.5% in 2013, down from 4.4% in 2012. Its economy was up 2.5% in 2013, slightly above the 1.3% it experienced in 2012.

All four countries have seen their overall economic growth rates slow in the past couple of years (although Brazil saw a slight bump in 2013), and Russia and Brazil have already seen the effects on retail sales of licensed merchandise, which are still growing but at nowhere near the fast pace of recent years.

Many observers believe the same phenomenon will occur in China and India as the pace of growth in their economies slows. Both continued to experience significant increases in retail sales of licensed goods in 2013, however.

In all four cases, it should be noted that increases in sales of licensed goods continue to beat general economic growth, and licensing executives continue to see these countries as areas of focus going forward.



licensing news

PROPERTIES AVAILABLE OR RECENTLY ASSIGNED, U.S.

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
Dean & JoJo	A story about a man's interaction with a dolphin. Since featured in various media, including a documentary.	All	Dean Bernal, Dean & JoJo
GirlNation	Artwork intended for girls ages 10-15 years old.	Accessories, apparel, bedding, fashion, greeting cards, home accessories, stationery, wall art	Vicki De Roeck, Running Dog Design
Goosebumps (film)	Film based on the Scholastic book series by R.L. Stein, starring Jack Black and set for an August 2015 release.	Apparel, collectibles, costumes, games, gifts, novelties, party goods, puzzles, social expressions, toys	Leslye Schaefer, Scholastic Media
Happyworld	Heidi Kenney's home furnishings brand featuring snacks, desserts, and household items.	All	Peter Van Raalte, Infinity Licensing
Woodstock	Famous music festival celebrating its 45th anniversary this August. Epic Rights and Perryscope co-manage licensing.	All	Norman Perry, Perryscope Productions Dell Furano, Epic Rights

LICENSES RECENTLY GRANTED, U.S.

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Amazing Spider-Man 2 (The)	Hot Toys Ltd.*	Collectible figures	Disney Consumer Products
Batman	FunKo*	Vinyl collectibles	Warner Bros. Consumer Products
Beekman 1802	Original Muck Boot Company (The) dba Honeywell	Footwear	Brand Central
Crock-Pot	B&G Foods*	Seasonings	Global Icons
Discovery Kids	Good Stuff/Basic Fun div. The Bridge Direct	Classic viewer	Discovery Communications
	MerchSource	Electronics, toys	
	NKOK	Toys	
Ford	Lucky Brand*	T-shirts	Global Icons
Game of Thrones	ThreeA Toys	Collectible figures	HBO
Good Sign	Original Retro Brand	Apparel	Kitsch Cache
Goonies	Albino Dragon	Crowdsourced playing cards	Warner Bros. Consumer Products
Hoodsbee	Evy of California	Hoodies	HLL Designs
Loudmouth	M-Edge Accessories	Mobile accessories, tablet accessories	Brand Liaison (The)
Minecraft	Jinx*	Plush	Mojang AB
NBA	Peace Love World	Apparel (women's)	NBA Entertainment
Old Guys Rule	Tervis	Tumblers	Old Guys Rule
Pepsi	GL Concepts	Apparel	Joester Loria Group
	JC Fits	Fashion tops, tank tops	
	SHUT	Skate decks	
Roland Mouret	Banana Republic	Apparel	Roland Mouret
Sesame Street	MakerBot	3D printable models	Sesame Workshop

*Extension or renewal.

Continued on page 6


licensing news *Continued from page 5*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Sofia the First	Candyrific*	Candy accessories	Disney Consumer Products
Teenage Mutant Ninja Turtles	FunKo	Vinyl figures	Nickelodeon & Viacom Consumer Products
	Kidrobot	Cards, hats, key chains, t-shirts, vinyl figures	
True Blood	FunKo	Vinyl figures	HBO
Watch Dogs	ASTRO Gaming	Headsets, speaker tags	Ubisoft Entertainment
	BioWorld Merchandising	T-shirts	
	Frank & Oak	Apparel	
	ThinkGeek	Accessories, lanyards, mobile accessories, pin sets, t-shirts, wallets, wristbands	
	Trends Intl.	Posters	
William Rast	Peerless Clothing	Apparel (men's)	Sequential Brands Group
Wizard of Oz (The)	Tonner Doll	Dolls	Warner Bros. Consumer Products

INTERNATIONAL PROPERTIES AVAILABLE OR RECENTLY ASSIGNED

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
ALVINNN!!! and The Chipmunks	Bagdasarian Productions' new brand refresh of the Chipmunks property.	All (Worldwide excluding North America)	Guillaume Soutter, PGS Entertainment
DreamWorks Animation	Properties represented include How to Train Your Dragon 2, Penguins of Madagascar, Shrek, and other DreamWorks properties.	All (Israel)	Gil Saban, Saban Brands Israel Ltd.
Gary Baseman	Artist known for several art exhibitions, the creation of animated series Teacher's Pet, and other visual works.	Accessories, apparel, collectibles, home decor, stationery (Worldwide)	Dell Furano, Epic Rights
Geronimo Stilton	Book and television series featuring a talking mouse living in New Mouse City.	Apparel, arts & crafts, costumes, games, home-ware, novelties, stationery, toys (North America)	Cathy Malatesta, Lawless Entertainment
iDoo-B-Doo	Illustrated girl's crafting brand.	Apparel, arts & crafts, greeting cards, house-ware, stationery (Europe)	Jane Evans, JELC Ltd./Blue Trellis
Lumberjack	Italian lifestyle brand founded in 1979.	Accessories, apparel, bags, fragrance, housewares (Worldwide)	Hakan Durda , Sinerji
UEFA EURO 2016	2016 Football tournament. Also includes rights to UEFA European Under-21 Championship, European Women's Championship, and Futsal EURO.	Fashion, leisure, lifestyle (Worldwide)	Bruno Maglione, IMG Worldwide

INTERNATIONAL LICENSES RECENTLY GRANTED

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Animal Planet	Chupa Chups, S.A. Unipersonal	Confectionery (EMEA)	Discovery Communications
Animal Planet Pet	Fantasia Accessories	Pet grooming products (North America)	Discovery Communications
Arsenal	Puma*	Apparel, back-to-school, football kits, gifts, souvenirs, sporting goods (U.K.)	Arsenal Football Club
Belle & Boo	Character World/TDS Enterprises	Bedroom textiles (U.K.)	Belle & Boo
Breaking Bad	Groovy UK*	Onesies, robes (U.K.)	Rocket Licensing

*Extension or renewal.

Continued on page 7


licensing news *Continued from page 6*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Breaking Bad	Poetic Gem*	Loungewear, nightwear, underwear (U.K.)	Rocket Licensing
	Pyramid Intl.*	Leather notebooks (U.K.)	
	Smiffy's*	Dress-up (U.K.)	
	VMC Accessories*	Mobile accessories (U.K.)	
	Winning Moves Deutschland GmbH*	Card games (Worldwide)	
Calvin Klein	American Sportswear S.A.	Dress shirts, dresses, footwear, leather goods, loungewear, outerwear, sleepwear, sportswear, suits, swimwear, ties (Latin America excluding Brazil, Mexico)	PVH
Captain Action Cat	Titan Publishing/Titan Entertainment	ID holders, mugs, t-shirts (U.K.)	Captain Action Enterprises
Care Bears	Campestre Confeccao e Comercio	Aprons, backpacks, binders, bottles, computer cases, laptop accessories & cases, lunch accessories, lunch boxes, pencil cases, shopping bags, shoulder bags, tote bags, travel bags, trolley bags (Brazil)	Exim Licensing
Care Bears	Minoya	Dresses, leggings, pants, parkas, socks, sweatshirts, t-shirts, tights (Japan)	MindWorks Entertainment
	Shobi	Combs, mirrors, notebooks, notepads, toothbrushes (Japan)	
	T-Arts	Erasers, hair accessories, mirrors, notepads, pouches, stickers, tape, vending machine toys (Japan)	
Care Bears	T's Factory	Cups, tins, tissue box covers (Japan)	MindWorks Entertainment
Chewits	RTC Direct	Home fragrance (U.K.)	Beanstalk (U.K.)
Disney	Havaianas	Flip flops (Worldwide)	Disney Consumer Products
Domo	FunKo	Co-branded vinyl figures (Worldwide except Asia)	Big Tent Entertainment
	Underground Toys	Co-branded plush (Worldwide except Asia)	
DreamWorks Animation	Poetic Gem	Apparel (U.K.)	DreamWorks Animation
Ghostbusters	FunKo	Co-branded vinyl figures (Worldwide except Asia)	Sony Pictures Consumer Products
	Underground Toys	Co-branded plush (Worldwide except Asia)	
Masha and the Bear	Simba Dickie Group	Master toy (Eastern Europe, Germany, Austria, Switzerland, Iberia, Nordics, Benelux, France, Italy, U.K.)	Ink Brands
Mass Effect	IP Factory	Collectible statues (Worldwide)	Electronic Arts
Nautica	Amiee Lynn	Belts, cold weather accessories, hats, hosiery (U.S., Canada)	Nautica
Pepsi	Bang & Olufsen	Headphones (Worldwide)	Joester Loria Group
Popeye	Knitmania	Apparel (U.K.)	Allsorts Licensing
Pou	Giromax Intl.	Sticker albums (Spain)	Consumer Product Connection
Sam Faiers	Per-Scent	Fragrance (U.K.)	Rights Management Intl. Ltd.
Strawberry Shortcake	Benco Internacional	Accessories, apparel, footwear (Singapore)	Exim Licensing
	Din Group	Footwear (children's) (Ecuador)	
Strawberry Shortcake	Prima Food	Cakes (Singapore)	Medialink Entertainment Ltd.
Watch Dogs	Musterbrand	Accessories, apparel (Worldwide)	Ubisoft Entertainment

*Extension or renewal.



contacts & connections

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

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Disney Consumer Products, Paul Gitter, SVP Licensing Marvel, 818-544-1950, paul.gitter@disney.com, P. 5.

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Epic Rights, Dell Furano, CEO, 310-289-8220, dell@epicrights.com, P. 5, 6.

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Funko, Brian Mariotti, President, 425-783-3616, brian@funko.com, P. 5, 6, 7.

GL Concepts, Christopher Molnar, Founder/Principal, info@goodlifeclothing.us, P. 5.

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Good Stuff/Basic Fun div. The Bridge Direct, Stephen Chernin, EVP, 201-849-4530, schernin@goodstuff.com, P. 5.

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Original Retro Brand, Marc Herman, CEO, 323-583-4508, mherman@originalretrobrand.com, P. 5.

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Perry Ellis Intl./PEI Licensing, Kelly Payfer, VP Licensing, 212-536-5785, kelly.payfer@pery.com, P. 11.

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Playboy Enterprises, Matt Nordby, President Global Licensing, 310-424-1800, mnordby@playboy.com, P. 10.

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Puma, Tara McRae, VP Strategic Planning, Brand Management & Marketing, 617-488-2900, tara.mcrae@puma.com, P. 6.

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Rovio Entertainment, Naz Cuevas, EVP Global Licensing, 818-970-1030, naz.cuevas@rovio.com, P. 2.

Rovio Entertainment, Paul Bufton, VP Licensing & Retail, EMEA, paul.bufton@rovio.com, P. 2.

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contacts & connections *Continued from page 8*

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international contacts & connections

This section refers to the International listings on Page 9. International calls from the U.S. and Canada must be preceded by the 011-prefix.

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Musterbrand, Knut Jochen Bergel, Founder & CEO, 49 040 73057973, team@musterbrand.com, P. 7.

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Per-Scent, Sanjay Vadera, Founder/CEO, 44 161 873 2100, enquiries@per-scent.co.uk, P. 7.

PGS Entertainment, Guillaume Soutter, 852 53 31 05 29, amvilcu@pgsentertainment.com, P. 6.

Poetic Gem, Elliott Matthews, Executive Director, 44 19 2324 9497, elliottpoeticgem.com, P. 7.

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Titan Publishing/Titan Entertainment, Nick Landau, Owner, 44 207 620 0200, nick.landau@titanemail.com, P. 7.

Triumph International, Oliver Spiesshofer, Partner, 49 89 5111 80, P. 11.

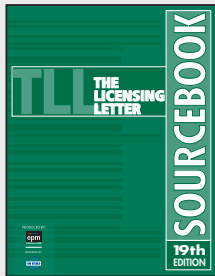
Ubisoft Entertainment, Jason Hall, Licensing Executive, 44 193 257 8041, jason.hall@ubisoft.com, P. 6, 7.

Underground Toys, Robyn Cowling, International Licensing Director, 44 20 7801 6325, robyn@underground-toys.com, P. 7.

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Winning Moves Deutschland GmbH, Kathrin Piel, Head Product Development & Licensing, 49 211 5502750, piel@winningmoves.de, P. 7.

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Digital Properties

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The latest properties to join the list are celebrities who have gained fame through Instagram and Pinterest.

Retailer Aeropostale signed teen style expert Bethany Mota to create an extensive and exclusive line of apparel in a year-long effort beginning in December 2013. Mota is best known for her Instagram account (2.5 million followers), as well as her YouTube channel (5.6 million subscribers) and Twitter feed (1.3 million followers).

While some of these digital-origin properties have hoped to build mainstream, global licensing efforts, none but Angry Birds have succeeded to date.

As of late May, Aeropostale had 129 Bethany Mota items online, including apparel, jewelry, bags, sandals, electronics accessories, and more.

In spring 2014, meanwhile, mass merchant Target signed three highly followed and fashion-influencing Pinners to create limited-edition collections of party goods. They include Joy Cho of Oh Joy (13.6 million followers), Jan Halvarson of Poppytalk (8.3 million), and Kate Arends of Wit & Delight (2.6 million). All have some experience in design or fashion blogging, but their impressive Pinterest followings were a key part of their appeal for Target.

Also as of late May, Target had 38 Oh Joy! For Target items online, 19 of them on clearance, most under \$5 and nothing over \$13. There were no results yet for Poppytalk, and a search of “Wit & Delight” brought up a lot of Kidz Delight-branded toys, “The Wit and Wisdom of Yogi Berra” (not to mention Ozzy Osbourne, William F. Buckley, and Margaret Thatcher).

While some of these digital-origin properties have hoped to build mainstream, global licensing efforts, none but Angry Birds have succeeded to date. Most lend themselves more to niche programs that focus on a narrow slice of categories, customers, and/or territories.

Japan: Land of the Rising Designer Collaborations

Fashion designers all over the world have been pairing with corporate brands, characters,

artists, sports properties, retailers, and other designers for unique collaborations. Japanese designers are frequent participants in this trend:

- ▶ Streetwear brand Hysteric Glamour partnered with Playboy for a line of retro casual clothing for men and women, including t-shirts, sweats, sweaters, pants, skirts, and footwear available in its stores in Japan and online.
- ▶ Beams, a high-end fashion specialty store, has offered adult-focused Beams x Pokémon lines featuring apparel, accessories, and gifts.
- ▶ Nigo, a designer known for his Human Made brand, launched a line of vintage-inspired Coca-Cola menswear including items from sweatshirts to jodhpur shorts, also available in Beams stores in Japan, as well as select boutiques in the U.K., Canada, and the U.S.
- ▶ Junya Watanabe partnered with Spanish leather goods brand Loewe for a series of capsule collections of men’s and women’s apparel and accessories, available at Dover Street Market in Tokyo and at Loewe stores in Spain.
- ▶ Japanese design label Ropé Picnic collaborated with Scandinavian-born, Brooklyn-based artist Lotta Jansdotter for a collection including a women’s blouse, dress, miniskirt, and shorts.

The technique of co-branding in general is widespread in the Japanese licensing business these days. Hello Kitty recently paired with the mobile game property Nameko Saibai and with New Japan Pro-Wrestling, to name just two examples.

Athletes Score Post-Sports Fashion/Lifestyle Programs

Athletes are increasingly following in the footsteps of musicians, actors, models, and other celebrities in establishing lifestyle apparel programs.

The products capture their off-field fashion style rather than being tied to their teams or their accomplishments on the diamond, court, rink, or pitch.

The partners in these ventures want to lure the athletes’ fans into the store, of course, but they also hope to appeal to non-fans who may or may not recognize the name but simply like the clothing.

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Athletes Score

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For the most part, these player deals do not incorporate team or league logos, and so licensing is limited to the athlete him- or herself.

The trend cuts across many sports and many countries, and encompasses products from hosiery to suits:

- ▶ The NHL's Henrik Lundqvist paired with Bread & Boxers, a bodywear company in his home country of Sweden, for a series of capsule collections. United Legwear manufactures and distributes the brand in the U.S.
- ▶ Former NBA player Shaquille O'Neal teamed with Peerless Clothing for men's sport coats and suit separates that launched this year at Macy's.
- ▶ Soccer player David Beckham has a global bodywear line with H&M.
- ▶ The NFL's Cam Newton launched MADE Cam Newton, a menswear label, with the department store chain Belk.
- ▶ Golfer Jack Nicklaus licensed Perry Ellis International for a line of men's and ladies' sportswear and tailored clothing.

Golfers, whose "uniform"—unlike other athletes' on-field gear—resembles everyday clothing, have been involved in men's apparel in a significant way at least since Arnold Palmer in the 1960s. But the trend is intensifying.

Athletes increasingly realize that their careers are limited in duration. If successful, these types of branded apparel programs can live on, potentially bringing the athletes fame and fortune even after their retirement from sports.

Lingerie, Swimwear & More: Fashion Models Expand Range of Licensed Wearables, Accessories

Fashion models have been licensing their names into apparel, accessories, fragrances, and other products since at least the 1980s. Cheryl Tiegs had a relationship with Sears that lasted from 1981 to 1989 and generated \$100 million in annual sales volume in its early years, according to a 1983 article in *The New York Times*.

But the number of fashion models turning to licensing has intensified in recent years, as we have chronicled in TLL Special Projects Editor Karen Raugust's blog (July 15, 2013) and in THE LICENSING LETTER (November 21, 2011). That trend continues with a number of new initiatives announced in the last six months:

- ▶ Elle Macpherson launched an exclusive line of lingerie, under The Body by Elle Macpherson sub-brand, in about a third of JCPenney's stores. Australian company Bendon Limited Apparel, which has been Macpherson's lingerie licensee since 1990, is producing the line for the retailer; it will also sell the new collection at Myer and David Jones in Australia and at Farmers Department Stores and its own Bendon Lingerie stores in New Zealand.
- ▶ Alessandra Ambrosio introduced a line of swimwear with Lunada Bay, a deal that followed on the heels of a new apparel line with retailer Planet Blue. Silver Sunrise, an IP management company partly owned by Ambrosio, and its brand management and licensing partner Cherokee forged the deal.
- ▶ The Helena Christensen for Triumph collection of lingerie was introduced to the U.S. market for the first time, exclusively through Triumph International's new U.S. e-commerce website. Christensen's partnership with Triumph started in 2012.

Fashion models have been licensing their names into apparel, accessories, fragrances, and other products since at least the 1980s...But the number of fashion models turning to licensing has intensified in recent years.

- ▶ Ashley Smith partnered with California lifestyle brand RVCA for six capsule collections of "wardrobe essentials," with the first debuting this fall. She also endorses the company, which is known for its skate and surf vibe.
- ▶ Dree Hemingway, model, actress, and great-granddaughter of Ernest Hemingway, joined Cole Haan in a multiyear modeling deal that includes a signature collection of women's footwear and handbags.
- ▶ Ashley Graham created a 14-piece collection of lingerie for Canadian plus-size retailer Addition Elle. The collaboration debuted at 70 of the chain's stores and on its website.

Meanwhile, Kathy Ireland, the foremost model-turned-licensor, with a reported \$2 billion-plus annually in retail sales of licensed home furnishings and other products, continues to expand into new categories, with electronics and pet products among the most recent.

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New TLL Store Check Survey Identifies Opportunities Around The Country, Across Categories & Channels

THE LICENSING LETTER (TLL) and Project Partners Network (PPN) have joined forces to launch a monthly **Store Check Survey** of extensive store data from around the country (and the globe), and across product categories and retail channels.

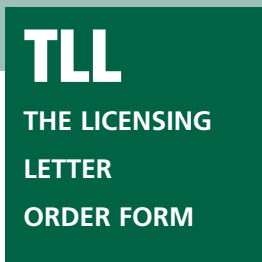
Subscribers receive a monthly PowerPoint showing, first-hand, how licensed products and properties are holding up against the private label and national brands on retail shelves.

The **TLL Store Check Survey** throws the spotlight on six to eight product categories in half a dozen cities each month, delivering photos and analysis of what's available at mass merchants, regional chains, value stores, online, and more.

"Everyone does store checks on a small scale, typically where they work or live, or in a client city where the client is well-represented," says Ira Mayer, Publisher and Executive Editor of TLL. "The **TLL Store Check Survey** nationalizes the process to give clients a wide-ranging, impartial view of the competition — and the opportunities."

"With more and more brands demanding field reports from their licensees, the **TLL Store Check Survey** does clients' homework for them," add PPN principals Leigh Ann Schwarzkopf and Lynn Scott.

For a sample report, and further information, contact Randy Cochran, at rcochran@epmcom.com or 1-212-941-1633, x18. Or visit EPM booth B-132 while at Licensing Expo.



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