

THE LICENSING LETTER

THE DEFINITIVE SOURCE FOR DATA, ANALYSIS, NEWS AND CONTACTS SINCE 1977

44 Entertainment/Character Properties Reach \$100 M in Sales of Licensed Merchandise; 50% of Sales Are Disney's

THE LICENSING LETTER estimates that 44 properties reached \$100 million or more in retail sales of licensed merchandise in the U.S. and Canada in 2013. This compares to 34 that made the list for 2012 and 37 in 2011. (See exhibit on pages 3-4.)

Retail sales generated by the \$100 million-plus properties in the U.S. and Canada totaled \$16.002 billion in 2013, compared to \$13.483 billion for the 2012 list as restated in the current chart. (Note: Based on more in-depth input from many licensors, THE LICENSING LETTER has restated many of the dollar values published last year—some now appearing higher, others lower. As a result, direct year-to-year comparisons to the list published a year ago should not be attempted.)

Disney's classic Mickey & Friends (including Minnie Mouse) tops the list at almost \$1.6 billion in retail sales for 2013 (Mickey Mouse Clubhouse and Minnie's Bow-Tique each have their own licensing programs and are included on the list separately). Disney Princess is in second place at \$1.2 billion. Only one other property exceeded \$1 billion in 2013 U.S./Canada retail sales: Hello Kitty, at \$1.048 billion. (Star Wars fell just below the billion-dollar mark in the U.S./Canada, with estimated retail sales of \$980 million).

These three \$1 billion-plus properties, while accounting for 7% of the properties making the list, accounted for 24% of estimated sales generated collectively by all of the members of the "\$100 million club."

Just 10 (23%) of the properties that were on the list in both 2012 and 2013 experienced growth in U.S./Canada retail sales in 2013; of course, the dozen new properties grew, as evidenced by their addition to the list.

Doc McStuffins was the fastest growing property, at 20% over 2012, followed by My Little Pony, with an 18% gain, and Power Rangers, at 15%. Others showing increases include Sesame Street, Spider-Man, Peanuts, Monster

High, Betty Boop, The Simpsons, and Garfield.

New properties on the list for 2013 include Teenage Mutant Ninja Turtles (\$750 million in retail sales in the U.S. and Canada), Monsters University (\$600 million), Duck Dynasty (\$360 million), Skylanders (\$300 million), Sofia the First (\$193 million), Minnie's Bow-Tique (\$175 million), Minecraft (\$150 million), Despicable Me (\$130 million), Mickey Mouse Clubhouse (\$125 million), Popeye (\$110 million), Adventure Time (\$105 million), and Lalaloopsy (\$100 million).

Year-on-year declines in the U.S. and Canada for the remaining properties ranged from -2%

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COMIC CON

Women and Kids Are Focus as New York Comic Con Draws 150,000+

New York Comic Con attracted over 150,000 people this year—up about 20,000 from 2013. In addition to the usual Javits Center site, the organizers added 110 events at 25 venues around the city so that the show could accommodate more people than the Javits can hold.

Two trends out of New York Comic Con, as reported by *Publishers Weekly Comics World*: more involvement of women in creating and populating comics and a return to publishing comics for children.

Between 40% and 50% of comics readers—and convention attendees—are women, and female characters and creators were more common this year than in the past. More than a dozen women-oriented or women-generated projects were in evidence on the mammoth show floor from Marvel (including two Spider-Man spinoffs: one built around Peter Parker's girlfriend Gwen Stacy and the other around Silk); a joint effort between Dark Horse and Archie; IDW (featuring 1980s animation

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➡ Licensing Ledger

REFOCUSING THE LUXURY EYEWEAR MARKET

Expect luxury fashion and other upscale designers to move distribution of their (currently) licensed eyewear to their own more exclusive retail channels as they seek to maintain their luxury images.

Some are taking eyewear in-house, but the expectation is that many brands will continue to be licensed, reports *WWD* from the **Silmo** eyewear conference and trade show in Paris. "The model of the small independent optician selling Gucci glasses at 250 euros is over," Andrea Tessitore, co-founder and CEO of **Italia Independent**, a high-end eyewear manufacturer, tells the publication.

Key eyewear trends: darker frames, oversize round shades, and creative color combinations and temples. Acetate is the season's main material, and Asia and the Middle East are among the strongest markets.

Retail sales of licensed eyewear in the U.S./Canada totaled \$4.4 billion in 2013, up 3.5% from 2012, according to *TLL's Licensing Business Databook*.

TACKLE THIS, TOY INVENTORS
NFL Players Inc., the licensing arm of the NFL Players Association, is sponsoring a competition to develop toys for children eight and younger that feature active NFL player names, uniform numbers, signatures, nicknames, images, and likenesses. The competition runs through Dec. 19, 2014. Information and applications are available at nflpa.com/playmaker. Three finalists will present their concepts to an NFLPI committee early next year, with the winner to be announced at Toy Fair in February. Separately, NFLPI reports that Seattle Seahawks quarterback Russell Wilson was the player with the highest retail sales of licensed merchandise in stores and online from June 2014 to August 2014, based on reports from more than 70 NFLPI licensees including **Nike**, **VF Imagewear**, **Fanatics**, and others.

MARTHA LICENSES MEREDITH
Martha Stewart Living Omnimedia is licensing **Meredith Publishing** to handle its magazines in the U.S. and Canada. The deal is for 10 years. Meredith will also assume responsibility for the sales and

marketing of marthastewart.com and marthastewartweddings.com as well as other digital assets and its video library. The average royalty rate for publishing products in the U.S./Canada was 9.73% in 2013, according to *TLL's Royalty Trends Report*, more than a full percentage point higher than the average for all licensed products.

UNIVERSAL GOES TO BEIJING
Universal Parks & Resorts joins **Disney** and **DreamWorks** in adding its own theme park operation in mainland China. The \$3.3 billion Universal park, jointly owned by Universal and the Beijing Shouhuan Cultural Tourism Investment group of four state-owned companies, will initially be a 300-acre park in Beijing, with plans to add another 700 acres over time. The first phase is expected to open in 2019, according to state-run media reports. While the partners decline to specify what attractions might be offered, the *Los Angeles Times* speculates that **Transformers**, **Despicable Me**, and **Harry Potter** would be likely candidates given those movies' popularity in China, with *Transformers: Age of*

Reason scoring as the top-grossing film ever in China. Shanghai Disneyland is scheduled to open late in 2015; the DreamWorks park is also in Shanghai, with no projected opening date as yet.

LIDS EXPANDS ACROSS CANADA
 Indianapolis-based **LIDS Sports Group** has acquired **Jersey City Canada**, a licensed sports apparel, headwear, and novelty company operating 28 retail stores across four Canadian provinces. The acquisition also includes nine headwear-only CAPZ stores and two websites. LIDS will become the Canadian Football League's online provider of licensed merchandise. The new deal gives LIDS more than 150 locations across Canada, an increase of about 35%.

BOOMERANG RETURNS (REFRESHED)

Turner Broadcasting is rebranding its Boomerang channel as an all-animated kids network offering classic and contemporary family cartoons from its Warner, Hanna-Barbera, Cartoon Network, and MGM libraries, with original fare to follow. The rollout began in September in Latin America, Australia follows this month, and the U.S. and other markets in 2015. Turner says there will be a total of 13 international feeds for the network.

IN MEMORIAM

Jim Bell, founder in 2000 of **J2 Licensing** and previously a licensing and marketing executive at **WWF**, **Rabbit Ears Productions**, **New Jersey Devils**, **The Jim Henson Co./Disney**, and **Simplicity Pattern**, died October 5. A memorial service will be held in the spring. In lieu of flowers, donations may be made in Bell's memory to the **Ridgefield Golf Course Improvement Fund** or the **Portuguese Water Dog Fund**.



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Entertainment/Character Properties

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(for Batman) to -40% (for Dora the Explorer).

The fluctuations in year-to-year performance were relatively narrow in 2013, with only six of the properties demonstrating double-digit changes. The majority of changes up or down were in the low single digits.

Franchise Trends

In the past, the list has been dominated almost exclusively by classic properties. But 2013 sees the addition of a combination of rebooted or retargeted classics (Teenage Mutant Ninja Turtles, Minnie's Bow-Tique, Mickey Mouse Clubhouse), new and recent properties (Duck Dynasty, Skylanders, Sofia the First, Minecraft, Adventure Time, and Lalaloopsy), studio franchises (Monsters University and Despicable Me), and one "classic" classic: Popeye, whose

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DISNEY ACCOUNTS FOR HALF OF DOLLAR VALUE OF \$100 MILLION ENTERTAINMENT/CHARACTER PROPERTIES

Disney dominates the list of properties with estimated retail sales of \$100 million or more in the U.S./Canada once again in 2013. Fifteen of the 44 properties (34%) emanate from the company's Disney, Pixar, Marvel, and Lucasfilm divisions. However, those 15 properties account for 49% of the list in dollar value based on estimated retail sales of licensed merchandise in the U.S. and Canada as well as globally. Six of the top 10 properties in the U.S. and Canada are under the Disney umbrella; globally seven of the top 10 are Disney-owned.

Other licensors with multiple properties on the list include Nickelodeon (Turtles, Dora, and SpongeBob) with 7% of listings and accounting for 7% of retail sales in the U.S. and Canada, and Warner Bros. (Batman, Looney Tunes, and Superman), also with 7% of listings but accounting for less than 5% of retail sales.

Cartoon Network, King Features, Mattel, and Hasbro have two properties each on the list (less than 5% each of the total) and account for less than 3% each in retail sales.

ESTIMATED RETAIL SALES OF LICENSED MERCHANDISE BASED ON ENTERTAINMENT/CHARACTER PROPERTIES, U.S. & CANADA, 2013

PROPERTIES THAT GENERATED \$100 MILLION OR MORE (DOLLAR FIGURES IN MILLIONS)

PROPERTY	LICENSOR	2012 RETAIL SALES, U.S. AND CANADA	2013 RETAIL SALES, U.S. AND CANADA, PERCENT CHANGE	2013 RETAIL SALES, U.S. AND CANADA	2012 RETAIL SALES OUTSIDE U.S. AND CANADA	2013 RETAIL SALES OUTSIDE U.S. AND CANADA, PERCENT CHANGE	2013 RETAIL SALES U.S. AND CANADA	2012 GLOBAL RETAIL SALES	2013 GLOBAL RETAIL SALES CHANGE	2013 GLOBAL RETAIL SALES	2013 SHARE FOR U.S./CANADA	
1	Mickey & Friends	Disney	\$1,670	-5%	\$1,587	\$2,452	-3%	\$2,381	\$4,122	-4%	\$3,968	35%
2	Disney Princess	Disney	\$1,215	-5%	\$1,154	\$1,681	3%	\$1,731	\$2,896	-1%	\$2,885	40%
3	Hello Kitty	Sanrio	\$1,080	-3%	\$1,048	\$2,959	-5%	\$2,811	\$4,039	-4%	\$3,859	27%
4	Star Wars	Lucasfilm/Disney	\$1,031	-4%	\$990	\$1,235	-2%	\$1,210	\$2,266	-3%	\$2,200	45%
5	Winnie the Pooh	Disney	\$929	-10%	\$836	\$2,241	-12%	\$1,972	\$3,170	-11%	\$2,808	30%
6	Cars	Disney	\$860	-7%	\$800	\$1,667	-10%	\$1,500	\$2,527	-9%	\$2,300	35%
7	Teenage Mutant Ninja Turtles	Nickelodeon	First appearance	n/a	\$750	n/a	n/a	\$100	n/a	n/a	\$850	88%
8	Monsters University	Disney	First appearance	n/a	\$600	n/a	n/a	\$900	n/a	n/a	\$1,500	40%
9	Sesame Street	Sesame Workshop	\$583	3%	\$600	\$314	3%	\$323	\$896	3%	\$923	65%
10	Angry Birds	Rovio	\$590	-3%	\$572	\$1,259	4%	\$1,309	\$1,849	2%	\$1,882	30%
11	WWE	WWE	\$596	-6%	\$560	\$253	-7%	\$235	\$849	-6%	\$796	70%
12	Spider-Man	Marvel/Disney	\$388	3%	\$400	\$897	4%	\$933	\$1,285	4%	\$1,333	30%
13	Duck Dynasty	A&E	First appearance	n/a	\$360	n/a	n/a	\$0	n/a	\$360	\$360	100%
14	Peanuts	Peanuts Worldwide	\$340	3%	\$350	\$801	2%	\$817	\$1,141	2%	\$1,167	30%
15	Batman	DC/Warner	\$355	-2%	\$348	\$149	-2%	\$146	\$504	-2%	\$494	70%
16	Thomas the Tank Engine (1)	HIT	\$370	-6%	\$348	\$628	-8%	\$578	\$998	-7%	\$926	38%
17	Skylanders	Activision	First appearance	n/a	\$300	n/a	n/a	\$200	n/a	n/a	\$500	60%
18	Monster High	Mattel	\$225	8%	\$243	\$75	4%	\$78	\$300	7%	\$321	76%

Continued on page 4

**ESTIMATED RETAIL SALES OF LICENSED MERCHANDISE BASED ON ENTERTAINMENT/CHARACTER PROPERTIES,
U.S. & CANADA, 2013, CONTINUED**
PROPERTIES THAT GENERATED \$100 MILLION OR MORE (DOLLAR FIGURES IN MILLIONS)

PROPERTY	LICENSOR	2012 RETAIL SALES, U.S. AND CANADA	2013 RETAIL SALES, U.S. AND CANADA, PERCENT CHANGE	2013 RETAIL SALES, U.S. AND CANADA	2012 RETAIL SALES OUTSIDE U.S. AND CANADA	2013 RETAIL SALES OUTSIDE U.S. AND CANADA, PERCENT CHANGE	2013 RETAIL SALES U.S. AND CANADA	2012 GLOBAL RETAIL SALES	2013 GLOBAL RETAIL SALES CHANGE	2013 GLOBAL RETAIL SALES	2013 SHARE FOR U.S./CANADA	
19	Ben 10	Cartoon Network	\$244	-4%	\$234	\$475	-1%	\$470	\$719	-2%	\$704	33%
20	Betty Boop	King Features	\$220	3%	\$227	\$443	4%	\$461	\$663	4%	\$687	33%
21	Barbie	Mattel	\$232	-9%	\$211	\$196	-10%	\$176	\$428	-9%	\$387	55%
22	Looney Tunes	Warner	\$214	-3%	\$208	\$410	0%	\$410	\$624	-1%	\$617	34%
23	Power Rangers	Saban	\$180	15%	\$207	\$120	5%	\$126	\$300	11%	\$333	62%
24	SpongeBob	Nickelodeon	\$286	-30%	\$200	\$556	-10%	\$500	\$841	-17%	\$700	29%
25	Dora the Explorer	Nickelodeon	\$333	-40%	\$200	\$667	-10%	\$600	\$1,000	-20%	\$800	25%
26	Sofia the First	Disney	First appearance	n/a	\$193	n/a	n/a	\$82	n/a	n/a	\$275	70%
27	Transformers	Hasbro	\$197	-4%	\$189	\$117	-2%	\$115	\$314	-3%	\$304	62%
28	Doc McStuffins	Disney	\$155	20%	\$186	\$104	10%	\$114	\$259	16%	\$300	62%
29	Minnie's Bow-Tique	Disney	First appearance	n/a	\$175	n/a	n/a	\$175	n/a	n/a	\$350	50%
30	Superman	Warner	\$173	0%	\$173	\$104	0%	\$104	\$277	0%	\$277	63%
31	Simpsons	Fox	\$161	5%	\$169	\$191	7%	\$204	\$352	6%	\$373	45%
32	My Little Pony	Hasbro	\$131	18%	\$155	\$131	20%	\$157	\$260	20%	\$312	50%
33	Minecraft	Mojang	First appearance	n/a	\$150	n/a	n/a	\$150	n/a	n/a	\$300	50%
34	Avengers	Marvel/Disney	\$149	-2%	\$146	\$183	-2%	\$179	\$332	-2%	\$325	45%
35	Despicable Me	Universal	First appearance	n/a	\$130	n/a	na/	\$240	n/a	n/a	\$370	35%
36	Garfield	Paws Inc.	\$124	1%	\$125	\$300	2%	\$306	\$424	2%	\$431	29%
37	Mickey Mouse Clubhouse	Disney	First appearance	n/a	\$125	n/a	n/a	\$125	n/a	n/a	\$250	50%
38	Star Trek	CBS	\$124	0%	\$124	\$24	0%	\$24	\$148	0%	\$148	84%
39	Pokemon (2)	Pokemon Co.	\$115	n/a	\$115	\$191	0%	\$191	\$306	0%	\$306	38%
40	Popeye	King Features	First appearance	n/a	\$110	n/a	n/a	n/a	n/a	n/a	\$175	63%
41	Adventure Time	Cartoon Network	First appearance	n/a	\$105	n/a	n/a	\$35	n/a	n/a	\$140	75%
42	Toy Story	Disney	\$108	-7%	\$100	\$110	-9%	\$100	\$217	-8%	\$200	50%
43	Disney Fairies	Disney	\$105	-5%	\$100	\$106	-6%	\$100	\$212	-6%	\$200	50%
44	Lalaloopsy	MGA	First appearance	n/a	\$100	n/a	n/a	\$25	n/a	n/a	\$125	80%
TOTAL			\$13,483		\$16,002	\$21,035		\$22,393	\$34,516		\$38,460	42%

Notes: Figures are for retail sales of all licensed merchandise for calendar year 2013. Many figures for 2012 have been restated since they were published a year ago.

n/a = not available.

Does not include:

- Content licensing such as DVD/mobile apps, Web entertainment, etc.
- Products created through in-house divisions at the licensor rather than through licensing agreements with third parties (e.g., toys at Mattel or Hasbro)
- Nonretail products such as touring shows, theme park attractions, cruises, gambling/lotteries, and the like.

(1) 2013 was a transition year for Thomas, with toy manufacturing largely moving over to Mattel and that portion of the property's sales not reflected in our total for licensed goods.

(2) Nintendo, an equity owner of The Pokemon Co., is the video game licensee. As it is both a part owner and a licensee, its figures are not included. TLL estimates that Pokemon video game sales were in excess of \$300 million during 2013.

Source: THE LICENSING LETTER

Licensing News

Properties Available Or Recently Assigned, U.S.

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
Octonauts	Preschool TV show follows the adventures of eight anthropomorphic animal explorers as they rescue sea creatures.	All	JJ Ahearn, Licensing Street
Robot Chicken	TV series featuring a cyborg forced to watch sketch-comedy skits that parody pop culture.	Apparel, costumes, home goods, publishing, role play, toys	Ashley Mady, Brandberry

Licenses Recently Granted, U.S.

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Breaking Bad	PPW Toys	Collectible figures	Sony Pictures Consumer Products
Girl Scouts of the U.S.A.	Wicked Cool Toys	Activity sets, craft supplies, role play products	Girl Scouts of the U.S.A.
Grizzly Adams	Treco Sportswear	Bandanas, beach towels, blankets, knit tops, pillow cases, sweatshirts, T-shirts, tank tops, throw pillows (U.S.)	C3 Entertainment
Kellogg's	Hallmark Licensing	Ornaments	Kellogg, Joester Loria Group
Little Charmers	Spin Master	Accessories, apparel, dolls, play sets, toys	Corus Entertainment/Nelvana Enterprises
Madballs	Funrise Toy	Plush	American Greetings Properties
Monica Warhol	Nat Bouknight House of Glass	Glass art	C3 Entertainment
MoonPie	Anhe Candies	Fudge	Lisa Marks Associates (LMA)
	Zynga	Casino games	
Novogratz (The)	Shutterfly	Canvas prints, home decor, pillows, quilts, table runners, wall decals	Novogratz (The), CAA
Penny Dreadful	Bif Bang Pow!	Figures	CBS Consumer Products
	Changes	T-shirts	
	Titan Publishing/Titan Entertainment	Books, graphic novels	
	Tonner Doll	Fashion dolls	
USAOPOLY		Board games, scene statuettes	
Pitbull	Bally Technologies	Slot machines	Sony Music Entertainment
Smiley Brand	Cudlie Accessories	Backpacks	SmileyWorld, SNR Brand & Licensing Strategists
	Evy of California	Fashion apparel (children's)	
	Komar Sleepwear	Sleepwear (children's)	
	PPI Apparel Group	Activewear, sleepwear	

International Properties Available or Recently Assigned

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
Billy Idol	English pop/rock artist popular in the 1980s. World tour started earlier this month.	Apparel, gifts, novelties (Worldwide)	Lisa Streff, Epic Rights
Calimero	New animated TV series commemorate the property's 50th anniversary; premiers fall 2014 in Germany. Aimed at children from 4 to 9 years old.	All (Germany, Austria, Switzerland)	Katarina Dietrich, Team! Licensing GmbH
Descendants	Live-action film due 2015. The adventure comedy introduces the teenage offspring of Disney villains.	All (Worldwide)	Simon Philips, Walt Disney Company EMEA
Dream Big World	Latin American art and design brand, born from a TV show stressing accomplishing dreams and social responsibility.	Stationery, wall art (U.K., eventually Europe)	Russell Dever, Those Licensing People

*Extension or renewal.

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Licensing News *Continued from page 5*

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
Enid Blyton brands (The Famous Five, The Secret Seven, and The Naughtiest Girl)	Children's book series following a group of kids and their dog during summer break; The Secret Seven features a team of child detectives; and, The Naughtiest Girl is about a girl in boarding school.	All (U.K.)	Dom Wheeler, Brands With Influence
Gary Baseman	Contemporary artist whose work blurs the lines of fine art and pop culture. Creator of the ABC/Disney cartoon series Teacher's Pet, and the board game Cranium.	Apparel, collectible figures, domestics, gifts, housewares, novelties, paper goods, publishing, stationery (Worldwide)	Juli Boylan-Riddles, Epic Rights
Jefferson Airplane	Pioneer American psychedelic rock band.	Apparel, publishing (Worldwide)	Lisa Streff, Epic Rights
Kioka	3-D animated series follows Kioka as she explores the world inside her snow globe with imaginary toy friends.	All (France)	Ryuji Kochi, Toei Animation Europe S.A.S.
Marc Lacourciere	Also known as "Motor Marc;" fine art painter of automobiles and motorcycles.	All (Worldwide)	Ani Khachioian, C3 Entertainment
Matt Sewell's Birds	Quirky, pop art watercolors of birds. Previously licensed in apparel and accessories.	Apparel, gifts, housewares (EMEA)	Jo Edwards, Random House Enterprises
Nikki Chu Home	Celebrity interior and fashion accessory designer with an eye on "affordable luxury."	Bath, bedding, kitchen textiles, tabletop and decorative giftware, wall decor, window treatments (Worldwide)	Ilana Wilensky, Jewel Branding & Licensing
Petz Club	TV show follows Nina, Oscar, Tim, and their dog, Marlou, who created the Petz Club to find pets lost by children. Aimed at 5-to-8-year-olds.	Educational games, stationery, toys (EMEA)	Ryuji Kochi, Toei Animation Europe S.A.S.
Sailor Moon Crystal	Reboot of the classic magical girl franchise with updated artwork, music, and storylines.	Apparel, cosmetics, games, toys (EMEA)	Ryuji Kochi, Toei Animation Europe S.A.S.
Sonic x Hello Kitty	Brand fusion between Hello Kitty and Sonic the Hedgehog. Aimed at girls 10+ years-old.	Apparel, giftware, novelty and gift items (EMEA)	Paolo Casarini, Sanrio GmbH, Sissel Henno, SEGA Europe
Sooty Show (The)	British children's sitcom which aired from 1955-1992. Features the glove puppet characters Sooty, Sweep, and Soo on their daily adventures.	All (Australia, New Zealand)	Elie Mansour, BBC Worldwide Australia
Surf Sharks	Children's comedy-action book series depicts the friendship between a group of young surfers and sharks.	All (Worldwide)	Cathy Malatesta, Lawless Entertainment
Toot the Tiny Tugboat	Preschool animation based on Sebastien Braun's "Toot and Pop!"; follows a tugboat in his first year of service.	Apparel, melamine, stationery, toys (U.K.)	Claire Potter, Metrostar Media Ltd.
Uglydoll	Toy-based brand that defines ugly as a unique aesthetic.	Accessories, apparel, digital content, publishing, stationery, toys (Japan)	Takashi Oya, Fields Corp.
Viacom properties	All Viacom channels.	All (Adria)	Peia Eugenia, Backstage Licensing Srl
	Properties including Paw Patrol, the MTV Logo, Beavis & Buttthead, South Park, and other adult properties.	All (Russia)	Oleg Sudak, UDC Licensing Agency
Woodstock	Pivotal 1969 music festival considered synonymous with the counterculture generation and the catalyst of a global musical revolution.	Domestics, gifts, housewares, novelties, paper goods, stationery (Worldwide)	Juli Boylan-Riddles, Epic Rights

International Licenses Recently Granted

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Avanti	Hatber-M Ltd.	Backpacks, bags, calendars, cases, diaries, educational books, folders, note pads, pencils, pens, puzzles, sketchbooks (Russia)	Lisa Marks Associates (LMA)
Back to the Barnyard	Abyse CIJEP	Games (France) Plush (France)	Nickelodeon & Viacom Consumer Products

*Extension or renewal.

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Licensing News Continued from page 6

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Batman	Imap Export S.P.A./Original Marines	Apparel (Italy)	Warner Bros. Consumer Products (France)
	LEGO Systems	Toys (U.K.)	
	Luxess Group	Fragrance (Germany)	
	Rubie's Masquerade Co. UK Ltd.	Costumes (U.K.)	
Big Hero 6	Bandai Namco Games Europe	Action figures, plush toys, role playing toys (EMEA)	Walt Disney Company EMEA
	Stor SL	Bottles, bowls, cups, lunch boxes, plates (EMEA)	
	York Wallcoverings & RoomMates	Wall coverings, wall decorations (EMEA)	
Cinderella (2015 film)	SuperTrash	Accessories (girls'), apparel (girls'), ballet shoes, caps, skirts, sneakers, tops (girls') (Belgium, Netherlands, U.K.)	
	Swarovski North America	Jewelry (Worldwide)	
Doozers	Simon & Schuster Children's Publishing	Books (children's) (North America)	Jim Henson Company
Dora the Explorer	Abysse	Games (France)	Nickelodeon & Viacom Consumer Products
	Stella Pack S.A.	Bakery accessories, bath accessories (Poland)	
	Tactic Games	Games, puzzles (Nordics, U.K., Poland)	
DriveClub	BioWorld Merchandising	Accessories, fashion apparel (Europe)	Sony Computer Entertainment Europe
Heidi Klum	Bendon	Activewear, intimates, swimwear (Worldwide)	Full Picture
Jason Santos	CARD.com	Debit cards (Worldwide)	C3 Entertainment
Jeopardy!	GTECH	Lottery games (Worldwide)	Sony Pictures Consumer Products
Jurassic World	Hasbro	Master toy (Worldwide)	Universal Studios Partnerships & Licensing
	LEGO Systems	Toys (Worldwide)	
Martha Stewart Living	Meredith	Magazines (U.S., Canada)	Martha Stewart Living Omnimedia
Martha Stewart Weddings	Meredith	Magazines (U.S., Canada)	Martha Stewart Living Omnimedia
Masha and the Bear	Egmont (U.K.)	Publishing (Europe)	Turner Broadcasting System Europe, Ink Brands
	Simba Dickie Group	Toys (Europe)	
Master Athletes	Applicaster	Mobile apps (Worldwide)	FremantleMedia
Mister Maker	Live Nation	Live tour (ANZ)	Zodiak Kids, Fusion Agency
Mr. Bloom's Nursery	Jumbo Games	Games, puzzles (U.K.)	Bulldog Licensing
My Little Pony	Pez Intl.	Candy, candy dispensers (Germany, France, Austria)	Hasbro
National Geographic	Craghoppers Ltd.	Master apparel (North America)	National Geographic Society
Nickelodeon properties	Videojet Technologies	Tablets (France, French-speaking Belgium)	Nickelodeon & Viacom Consumer Products
Paw Patrol	Aykroyd & Sons Ltd.	Nightwear, underwear (U.K.)	
	Parragon Books Ltd.	Coloring and activity books, story books (U.K., South Africa, GAS, ANZ)	
Penny Dreadful	Pyramid Intl.	Accessories, coasters, mugs, posters, prints (U.K.)	CBS Consumer Products
Pokémon	GB Eye Ltd.	Cards, posters, prints (U.K.)	Pokémon Company Intl.
Simpsons (The)	Freegun/TEXTISS S.A.S	Underwear (boy's, men's) (France)	20th Century Fox Consumer Products
	Imap Export S.P.A./Original Marines	Apparel (boys') (Europe, Middle East)	
	Just Hype Ltd.	Backpacks, caps, hoodies, shorts, sweaters, T-shirts (U.K.)	
	MC2 Saint Barth	Beachwear (Italy, Spain, Saint Barth, Greece)	
	Shangai Intermoda Clothing Co. Ltd./ Etam China	Apparel (women's), backpacks, headwear (women's), makeup bags (China)	
	Undiz	Apparel, underwear (France, Spain, Morocco, Algeria, Poland, Germany, Oman, UAE, Belgium, Bahrain, Russia, Saudi Arabia, Tunisia)	
SpongeBob SquarePants	Caprice Australia	Sleepwear, underwear (Australia)	Nickelodeon & Viacom Consumer Products
	Fipo Group	Fashion apparel (Nordics)	
	Pigna Romania Impex s.r.l.	Stationery (Romania)	
	Tactic Games	Games, puzzles (Nordics, U.K., Poland)	

*Extension or renewal.

Continued on page 8

Licensing News Continued from page 7

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Star Wars Rebels	Mattel	Die-cast cars, play sets, toys, track sets (Europe)	Walt Disney Company EMEA
	Thinkway Toys	Interactive figurines (Europe)	
Talking Tom & Friends	AA Brands (Germany)	Apparel, nightwear, swimwear, underwear (Germany, Austria, Switzerland)	Outfit7, Team! Licensing GmbH
	AST License Ltd.	Magazines (Russia)	Outfit7, Icon Promotion
	Lotty Dotty	Accessories, T-shirts (U.S., Canada)	Outfit7, Bulldog Licensing
	Perfetti Van Melle SpA	Confectionery, lollipops, promotional premium toys (Russia)	Outfit7, Icon Promotion
Teenage Mutant Ninja Turtles	Top-Toy AS*	Bedding, lava lamps, novelties, toothbrushes with sound, towels (Nordics)	Nickelodeon & Viacom Consumer Products
Three Stooges (classic)	4 Corner Fingerboards	Fingerboards (Worldwide)	C3 Entertainment
	ALL U	Baseball shirts, coffee mugs, doormats, glassware, hats, jackets, sweatshirts, T-shirts, tapestry throws (U.S., Canada)	
	Photorealism	Benches, chairs, wall art (Worldwide)	
	Zynga	Social casino games (Worldwide)	
Tim Burton's The Nightmare Before Christmas	H&A	Earrings, hair accessories, lip balms, nail art, toiletries (U.K.)	Disney Consumer Products
Tree Fu Tom	Accessories Trade Mark (ATM)	Back-to-school (France)	FremantleMedia Kids & Family Entertainment, Biplano (Paris)
	Montichelvo Industrial S.A.	Back-to-school (Spain)	FremantleMedia Kids & Family Entertainment, El Ocho Licencias Y Promociones SL
Twirlywoos	Golden Bear Toys	Master toy (Worldwide)	DHX Media
Wheel of Fortune	GTECH	Lottery games (Worldwide)	Sony Pictures Consumer Products
World of Eric Carle (The)	Primary Colors	Activity paper products, confectionery, craft supplies, stationery (U.S., Canada)	Eric Carle Studio, Joester Loria Group

*Extension or renewal.

Comic Con

Continued from page 1

characters Jem and the Holograms); and others.

Will these projects resonate in the merchandise aisles, too? That, of course, remains to be seen, but the growth of regional Comic Cons, and the amount of merchandise being sold at them around the country, suggests new business opportunities.

As for the children's market, comic book publishers are embracing kids anew. Perhaps the biggest example was IDW's announcement that it has been licensed by Disney to create "Fun Packs" that include stickers, tattoos, and other assorted items based on Marvel's Avengers and various classic Disney properties.

IDW has created similar packs for Skylanders that are racked with toys in Target and Toys "R" Us, among others, and also publishes a Skylanders comic for the direct market, hardcover collections for bookstores, and a special edition for Scholastic book fairs. Separately, IDW is creating monthly comics series featuring classic Disney characters.


Looking at the collectors' market, IDW is developing limited editions of classic comics as well as collections of

Disney newspaper comic strips.

Retail sales of licensed merchandise based on comic books/strips totaled \$1.3 billion in 2013 in the U.S. and Canada, according to *TLL's Licensing Business Databook*.

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contacts & connections

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

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ALL U, Jim Holodak, President, 518-438-2558, jim@allu.com, P. 8.

American Greetings Properties, Carla Silva, SVP Global Licensing, 212-386-7355, csilva@ag.com, P. 5.

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Bally Technologies, Mark Lerner, VP Product Management & Licensing, 702-584-7700, mlerner@ballytech.com, P. 5.

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Brandberry, Ashley Mady, President, 561-499-0543, ashley@brandberry.com, P. 5.

C3 Entertainment, Ani Khachioian, EVP Licensing & Consumer Products, 818-956-1337 x215, akhachioian@c3entertainment.com, P. 5, 6, 7, 8.

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CBS Consumer Products, Elizabeth Kalodner, EVP & GM, 212-975-5232, liz.kalodner@cbs.com, P. 5, 7.

Changes, Will Thompson, VP Licensing, 718-441-6464, wthompson@changesonline.com, P. 5.

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Epic Rights, Juli Boylan-Riddles, EVP Strategic Partnerships & Licensing, 310-424-1907, juli@epicrights.com, P. 6.

Epic Rights, Lisa Streff, SVP Licensing, 310-424-1908, lisa@epicrights.com, P. 5, 6.

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Full Picture, Hilla Narov, VP Brand Management & Licensing, 212-627-0001, hnarov@fullpic.com, P. 7.

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GTECH, Robin Drummond, SVP Canada & COO Printing, 401-392-1000, robin.drummond@gtech.com, P. 7, 8.

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Hasbro, Simon Waters, SVP Global Brand Licensing & Publishing, 818-478-4804, simon.waters@hasbro.com, P. 7.

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Meredith, John Zieser, Chief Development Officer & General Counsel, 212-499-2000, john.zieser@meredith.com, P. 7.

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Novogratz (The), Cortney Novogratz, Designer, 646-833-7177, contact@thenovogratz.com, P. 5.

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PPW Toys, Dean Gorby, Business Development Manager, 213-225-6676, d.gorby@ppwusa.com, P. 5.

Pretty Ugly, Teresa Fazio, Licensing Director, 732-733-2160, teresa@uglydolls.com, P. 6.

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Sony Pictures Consumer Products, Greg Economos, SVP Global Consumer Products, 310-244-4188, gregory_economos@spe.sony.com, P. 5, 7, 8.

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Trevco Sportswear, James George, CEO, 248-526-1400 x14, jpg@trevoicoinc.com, P. 5.

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USAOPOLY, Maggie Matthews, VP Licensing, 760-602-7609, maggie@usaopoly.com, P. 5.

Videojet Technologies, Christopher Riley, VP Global Marketing & Strategy, 630-860-7300, christopher.riley@videojet.com, P. 7.

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York Wallcoverings & RoomMates, Nicole Zeigler, Licensing Manager, 717-846-4456, zeiglern@yorkwall.com, P. 7.

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Zynga, Michael Cibula, Business Development, 855-449-9642, mcibula@zynga.com, P. 8.



international contacts & connections

This section refers to the International listings in this issue. International calls from the U.S. and Canada must be preceded by the 011-prefix.

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Abysses, Aurélie Parenty, Brand Director, 33 2 35 98 18 63, parenty@abyssescorp.com, P. 6, 7.

Accessories Trade Mark (ATM), Cedric Chen, CEO, 33 1 48 87 73 04, cedric.chen@atm-e.com, P. 8.

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Aykroyd & Sons Ltd., Paul Williamson, Director, 44 161 929 1122, paul.williamson@aykroyds.co.uk, P. 7.

Backstage Licensing Srl, Peia Eugenia, Managing Director, 39 059 340700, eugenia.peia@backstagepro.it, P. 6.

Continued on page 10

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Tactic Games, Markku Heljakka, CEO, 358 2 624 110, markku.heljakka@tactic.net, P. 7.

Team! Licensing GmbH, Katarina Dietrich, CEO, 49 8924 231240, katarina.dietrich@teamlicensing.de, P. 5, 8.

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Entertainment/Character Properties

Continued from page 3

steady presence at retail may have warranted its inclusion on prior lists.

For the 2012 list, we wrote that “almost all of the [new] properties on the list were already well established in the market before calendar year 2012, and almost all are supported by multiple media and entertainment vehicles, including films, television shows, publishing, interactive games, and so on.”

That’s less true this year. Some of the properties generally grouped as “Disney Junior” because they air on that cable channel (Doc McStuffins, Sofia the First, Mickey’s Clubhouse, Minnie’s Bow-Tique—though Mickey and Minnie are obviously well established in their classic incarnations) have some other exposure, including live touring shows, but they are essentially TV shows. The same is true for the Turtles (based on a comic and the earlier TV show and movies), Duck Dynasty, and Adventure Time. Two are video games: Skylanders and Minecraft. The only new properties that originated as films that have been added to the list are Monsters University and Despicable Me 2 (both of which are sequels).

Global Performance

The top entertainment/character properties in the U.S. and Canada registered an additional \$22.393 billion in retail sales outside North America, for a total of \$38.460 billion in estimated global retail sales in 2013. Sales outside the U.S. and Canada accounted for 58% of this group—substantially greater than the average of 37% across all licensed properties. This can be attributed to growth in the box office performance of major franchise films outside North America, as well as to a dramatic increase in the number of media outlets for children’s television in both mature and emerging markets globally.

The top global performers from among the members of the U.S./Canada “\$100 million club” are Mickey & Friends and Hello Kitty, with estimated retail sales of licensed merchandise of nearly \$4 billion each. In all, 10 properties have retail sales of licensed merchandise of \$1 billion or more worldwide: Mickey & Friends, Hello Kitty, Disney Princess, Winnie the Pooh, Cars, Star Wars, Angry Birds, Monsters University, Spider-Man, and Peanuts.

The top 10 properties globally represent 23% of the list but account for 62% of retail sales.

Definitions and Methodology

The overall list reflects the top properties in the U.S. and Canada only and excludes top-performing global properties that have U.S. and Canadian retail sales of less than \$100 million. Some of the top properties globally—especially those coming out of the Asian markets—do not have a significant presence in the U.S. and Canada and therefore are not included in this ranking.

Properties included in this list are broader than those in *TLL*’s traditional entertainment/character segment as

defined for our annual businesswide estimates. For this analysis, we have included properties that are based on a recognized character(s) and use the strategies associated with an entertainment/character licensing program, as

ESTIMATED RETAIL SALES OF LICENSED MERCHANDISE BASED ON ENTERTAINMENT/CHARACTER PROPERTIES WORLDWIDE, 2013 PROPERTIES THAT GENERATED \$1 BILLION OR MORE GLOBALLY

	PROPERTY	2013 GLOBAL RETAIL SALES (MILLIONS OF DOLLARS)
1	Mickey & Friends	\$3,968
2	Hello Kitty	\$3,859
3	Disney Princess	\$2,885
4	Winnie the Pooh	\$2,808
5	Cars	\$2,300
6	Star Wars	\$2,200
7	Angry Birds	\$1,882
8	Monsters University	\$1,500
9	Spider-Man	\$1,333
10	Peanuts	\$1,167

Notes: Figures are for retail sales of all licensed merchandise for calendar year 2013. Many figures for 2012 have been restated since they were initially published a year ago.

n/a = not applicable

Does not include:

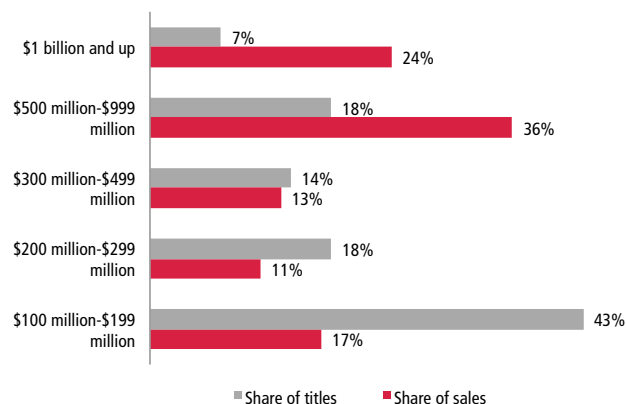
- Content licensing such as DVD/mobile apps, Web entertainment, etc.
- Products created through in-house divisions at the licensor rather than through licensing agreements with third parties (e.g., toys at Mattel or Hasbro)
- Nonretail products such as touring shows, theme park attractions, cruises, gambling/lotteries, and the like.

(1) 2013 was a transition year for Thomas, with toy manufacturing largely moving over to Mattel and that portion of the property’s sales not reflected in our total for licensed goods.

(2) Nintendo, an equity owner of The Pokemon Co., is the video game licensee. As it is both a part owner and a licensee, its figures are not included. *TLL* estimates that Pokemon video game sales were in excess of \$300 million during 2013.

Source: THE LICENSING LETTER

ESTIMATED RETAIL SALES OF LICENSED MERCHANDISE BASED ON ENTERTAINMENT/CHARACTER PROPERTIES, U.S. & CANADA, PERCENTAGE OF TITLES VS. PERCENTAGE OF SALES GENERATED, 2013 PROPERTIES THAT GENERATED \$100 MILLION OR MORE



SOURCE: THE LICENSING LETTER

Continued on page 12

Entertainment/Character Properties

Continued from page 11

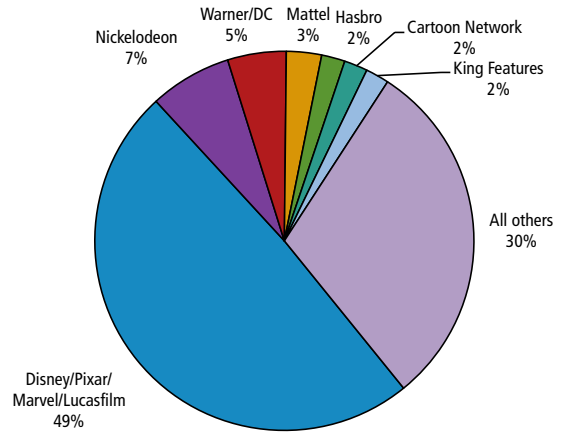
well as the expected TV shows and films. Some properties on this list would normally be categorized as “toy” (Barbie, My Little Pony, Lalaloopsy) or “interactive” (Angry Birds, Skylanders, Minecraft), for example.

The individual property figures are sometimes at variance with publicly reported numbers in company financials or cited by company executives. We look exclusively at consumer products that are licensed to third parties for manufacture and distribution and for which the manufacturer is paying a royalty. It does not include products created through in-house divisions of the licensor rather than through licensing agreements with third parties, or “core” products made by the licensor (e.g., toys for Hasbro- or Mattel-owned properties).

In addition, the numbers reflect retail sales of traditional licensed products but exclude content licensing (mobile apps, Web entertainment, virtual worlds, and the like) and nonretail products such as live touring shows, theme park attractions, lotteries and slot machines, cruises, and similar ventures.

For those properties that are multimedia, the estimates include all merchandise for the franchise (e.g., tied to films, TV shows, etc.). LEGO cross-licensing deals (e.g., LEGO Star Wars, LEGO Batman) are included under the respective partners’ properties (e.g., “LEGO Star Wars” under “Star Wars”). Subbrands are included along with the master property (e.g., “Clone Wars” under “Star Wars”). If individual properties are sometimes licensed as a group (e.g., Batman as part of a multiproperty DC Comics), the

LICENSOR SHARE OF ESTIMATED RETAIL SALES OF LICENSED MERCHANDISE BASED ON ENTERTAINMENT/CHARACTER PROPERTIES, U.S. & CANADA, 2013
PROPERTIES THAT GENERATED \$100 MILLION OR MORE



SOURCE: THE LICENSING LETTER

estimate includes only those products tied to the individual property as specified.

These estimates are developed through a combination of surveys; interviews with licensors, licensees, agents, and retailers; analysis of annual reports, royalty income, and data from publicly held companies; store visits; corporate retail sales information from websites; press releases; and articles. All the licensors that appear on the list were given the opportunity to comment. However, all estimates are by THE LICENSING LETTER.

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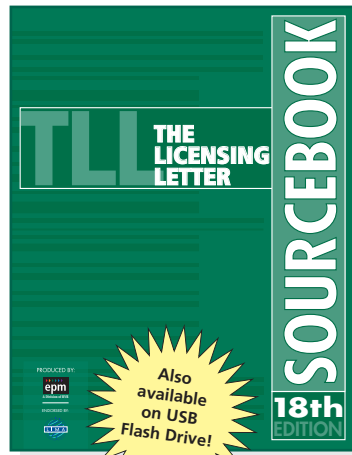
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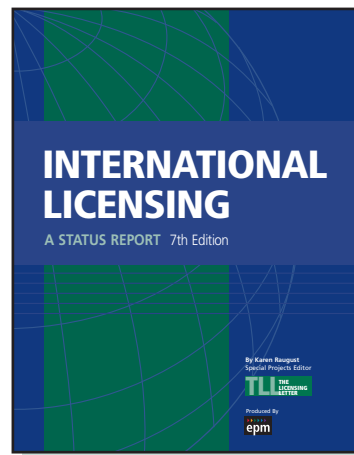
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