

TLL THE LICENSING LETTER

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Retail Sales of Licensed Goods in U.S./Canada Grow 2.5% in 2014: Entertainment, Sports, Food Make Biggest Gains

Retail sales of licensed goods in the U.S. and Canada reached \$99.9 billion in 2014, according to *The Licensing Letter's Annual Licensing Business Survey*. That's a 2.5% increase over the \$97.5 billion in retail licensed goods sales generated in 2013.

2014 is the fourth positive growth year in a row for the licensing business in the U.S. and Canada. The 2.5% rate of increase in licensed sales was slightly higher than 2013's 2.2% growth rate and in line with the overall performance of the North American economy—in 2014, U.S. GDP grew 2.4% and Canadian GDP grew 2.5%.

"Long-term, licensing is still recovering from the great recession of 2008. Although nothing dramatic, 2014 was another step in that direction," according to one respondent. "The generally good economy and lower gas prices made consumers feel more confident and willing to spend extra for brands and enabled the business to finish the year strong," he added. "Overall, the licensing climate has improved with the economy," said a licensing agent.

"Frozen" Drives Growth in Entertainment/Character

At 6%, entertainment/character had the highest growth rate of any property type. This is significant considering that entertainment/character licensing had declined every year since the great recession of 2008. In 2013, the sector turned around with 3.6% growth. This year, entertainment continued the momentum.

Of course, the headline story in entertainment and perhaps all of licensing in 2014 was "Frozen." "The Frozen effect lifted licensing," said one licensor. Various reports put retail sales of licensed Frozen merchandise in 2014 at between \$800 million and "roughly \$1 billion," the latter according to Disney, though Disney did not specify whether that figure is for U.S./Canada or worldwide. Regardless, respondents agreed that the property had a very strong impact in categories including toys, apparel, gifts/novelties, books and others.

FOR MANY IN THE DIFFERENT SECTORS DOMINATED BY FROZEN, HAVING FROZEN MEANT A GOOD 2014 AND NOT HAVING FROZEN MEANT A BAD YEAR.

But Frozen was a double-edged sword that crowded out existing brands like Hello Kitty and even Disney's own Princesses and Disney Junior characters Sofia the First and Doc McStuffins, among others, that had been on strong growth trajectories at the beginning of the year. For many in the different sectors dominated by Frozen, having Frozen meant a good 2014 and not having Frozen meant a bad year.

Still, it would be a mistake to overstate the significance of the Frozen effect—domination

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FOOD & BEVERAGE LICENSING

Single-Serving Products Make Coffee Rich Ground for Licensing

Two decades ago, Keurig Green Mountain introduced the world to its patented K-cup single brewing system. Coffee consumption would never be the same. Soon "K-cup" had become a generic term, and the communal pot of coffee for office or home consumption became an endangered species—at least in wealthy parts of the world like North America and Europe where consumers could afford and didn't mind spending extra for the convenience of single-cup consumption.

According to reports, in 2014, Americans spent \$2.83 billion on single-serving coffee. That's an increase of 280% since 2011, and sales are expected to exceed \$5 billion by 2016. K-cup devices have become an everyday kitchen appliance with more than 1 in 5 American homes containing single-serving coffee systems.

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➡ Licensing Ledger

MENSWEAR THRIVING ON ECOMMERCE

Who would have guessed? The fastest growing category of e-commerce sales is menswear. According to the research firm **IbisWorld**, between 2010 to 2015, online sales of menswear grew an average 17% per year, highest of any category studied. Only seven other categories had double-digit average annual growth:

- ▶ Groceries: 16.7%
- ▶ Shoes: 13.6%
- ▶ Health products, vitamins, supplements: 13.4%
- ▶ Computers and tablets: 11.4%
- ▶ Cosmetics: 10.9%
- ▶ Beer, wine and liquor: 10.8%
- ▶ Art: 10.6%.

The Ibis study also projects average 14.2% annual growth of menswear online sales in the next five years, which is also the highest of any category.

NINJA TURTLES TOPS \$1 BILLION

Global retail sales of Teenage Mutant Ninja Turtles exceeded \$1 billion in 2014, according to a Viacom International Media Networks executive at a **Nickelodeon-Viacom** Australian media event. "Turtles are a bigger consumer products success story than we ever imagined," said the exec. The company also has aggressive plans to keep "Turtles" momentum alive in 2016, including a second sequel movie and expansion into the pre-school market via the new Half Shell Heroes toy line.

FIFTY SHADES OF GREEN

Lingerie company **Bluebella** had never done a licensing deal before deciding to make a pitch for **Fifty Shades of Grey** lingerie. They got the license and created two lines: The F&F featuring soft pinks and silk trims for the mainstream play on the conventional love story part of the plot; the bondage-inspired Black Label line pick up on the story's kinky side. Both collections have sold like wildfire and inspired thoughts of a third line in time for Christmas.

DISNEY GOES 4D

Disney and children's publisher **Bendon** have teamed up to bring coloring books to life via new 4D technology. The "Disney Color and Play" app allows Disney characters

to jump off the pages of the Bendon coloring books and into the kid's iPad. Kids can also use the app to turn their own drawings into jigsaw puzzles.

LEFT SHARK HITS SHELVES

Less than a month after her attorneys put **Shapeways's** unlicensed Left Shark figurines out of business, **Katy Perry** (Bravado Intl. Group Merchandising Services) has launched her own, official products featuring the choreographically clutzy fish that became an instant Internet sensation during the Super Bowl halftime show. There are two official Left Shark offerings: a print hooded onesie for \$129.99 and a T-shirt for \$25.

ADIDAS SELLS MORE, MAKES LESS

The good news for **Adidas** is that sales of brand products in the fourth quarter increased 11% thanks to double-digit sales growth in the Sport Performance training and running categories. Adidas Originals and Adidas NEO product sales also jumped more than 10% during the quarter. Reebok sales grew by a more modest 1%. Overall, Adidas's sales for the year are up by 6%. The bad news for Adidas is that all of the above figures are *currency-neutral*. When the declining value of the euro vis-à-vis the dollar (and

other accounting factors related to goodwill) are taken into account, the company actually ended up losing money in the fourth quarter.

LICENSING SILVER LINING FOR DREAMWORKS

Consumer products licensing was the bright spot in a challenging 2014 for **DreamWorks Animation**, which saw its films "Penguins of Madagascar" and "Mr. Peabody and Sherman" under-perform in theaters. Consumer product revenue rose 77.5% to \$22.1 million in the fourth quarter, while segment gross profit rose to \$6.1 million due to higher sales of the studio's merchandise, location-based entertainment and retail development businesses. For the full year, consumer products revenues decreased 3.9% to \$64.8 million, due to a tough comparison with 2013, when DWA sold the 1960s live-action "Batman" TV series to Fox, and licensed the Kung Fu Panda and DreamWorks brands to Oriental DreamWorks. Excluding those items, consumer products revenues were up 21% for the year with gross profit of \$23.7 million, driven by location-based entertainment and merchandise sales. Overall, DWA posted 2014 revenues of \$684.6 million, a drop of 3.2%, and a net loss of \$308.3 million, due to a restructuring. Net income in 2013 was \$55.7 million.

DREAMWORKS ANIMATION'S HOME ENTERTAINMENT PERFORMERS

TITLE	RELEASE DATE	WORLDWIDE UNIT SALES*
How to Train Your Dragon 2	11.12.2014	7.5 million
Mr. Peabody & Sherman	10.14.2014	3.4 million
Turbo	11.12.2013	6.3 million
The Croods	10.02.2013	9.0 million

* through Dec. 31, 2014



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Retail Sales of Licensed Goods

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of entertainment/character licensing by superstar properties owned by Disney, Nickelodeon, Sanrio and others is nothing new. And, “as potent as Frozen was, Marvel and Teenage Mutant Ninja Turtles might have done just as well if not better in 2014,” according to one licensing agent. “While the A properties keep sailing along,” another licensing agent explains, “the B properties get harder and the C properties become just about impossible to sell.”

Key Trends in Licensed Properties

Sports had the second highest increase in sales by property type at 5%, nearly double the 2.8% increase of 2013. At \$14.1 billion, sports accounted for 14.1% of all retail sales of licensed goods. The NFL had a strong year. While hurting the NFL’s image, the Ray Rice and Adrian Petersen domestic abuse scandals harmed neither the NFL’s popularity nor its licensed sales. “The year started strong with the Denver-Seattle Super Bowl and momentum continued through the year,” notes one licensee. All three legs of the NFL’s licensed products triad—apparel, hard lines and even electronic games that had been reported to be soft at the start of the year—were up. “The obituary of the console game turned out to be premature,” chuckled one licensee, noting the four new NFL games successfully launched for PS4 and Xbox systems during the year. “For the first time in years sales of men’s jersey and NFL apparel grew faster than women’s,” he added.

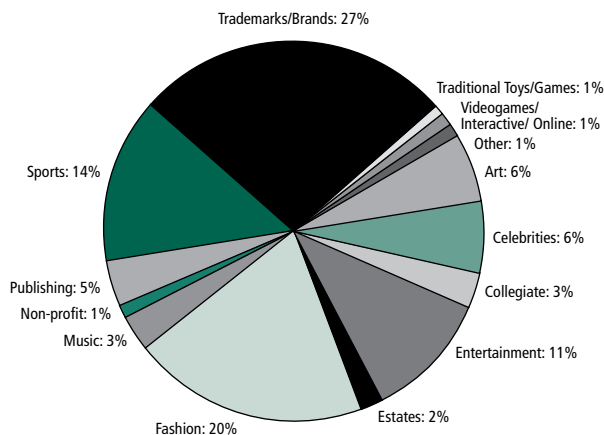
At 3.4%, **Fashion** was one of only two other property types to post gains above the overall licensing business average of 2.5% in 2014. Although it constitutes 20.3% of sales, second only to corporate/trademark, the fashion

sector is getting tougher each year. “People just aren’t as motivated by fashion labels as they were before the recession,” according to one licensing agent.

Echoing themes we heard over and over again in all sectors (and that we’ve been hearing for at least a decade), the glut of licensed brands and shrinkage of available retail space are making for intense competition. As one licensing agent explained, “to get on the floor, you need to be either an established label like Ralph Lauren, Calvin Klein or Donna Karan or a hot designer like Tory Burch.” As retail space in department, specialty and even “mass stores like JCPenney, which are increasingly focusing on private label and moving away from licensed brands dries up,” more fashion properties are turning to value stores and e-commerce.

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RETAIL SALES OF LICENSED MERCHANDISE, BY PROPERTY TYPE, 2014, U.S./CANADA



NOTE: Numbers may not add up exactly due to rounding.
SOURCE: THE LICENSING LETTER

RETAIL SALES OF LICENSED MERCHANDISE 2014, BY PROPERTY TYPE (DOLLARS IN MILLIONS)

PROPERTY TYPE	RETAIL SALES, 2014	RETAIL SALES, 2013	CHANGE, 2013-2014	SHARE OF MARKET, 2014
Art	\$5,548	\$5,641	-1.6%	5.6%
Art and Artists	\$4,147	\$4,254	-2.5%	4.2%
Museums	\$1,401	\$1,387	1.0%	1.4%
Celebrities	\$5,541	\$5,444	1.8%	5.5%
Entertainers/Models	\$2,540	\$2,490	2.0%	2.5%
Chefs/Home-Related	\$2,103	\$2,082	1.0%	2.1%
Digital/Other	\$899	\$873	3.0%	0.9%
Collegiate	\$3,345	\$3,430	-2.5%	3.3%
Entertainment	\$10,998	\$10,376	6.0%	11.0%
Estates	\$2,251	\$2,274	-1.0%	2.3%
Fashion	\$20,316	\$19,654	3.4%	20.3%
Apparel	\$17,277	\$16,612	4.0%	17.3%
Footwear	\$2,393	\$2,418	-1.0%	2.4%
Home	\$646	\$624	3.5%	0.6%
Music	\$2,492	\$2,556	-2.5%	2.5%
Non-profit	\$1,258	\$1,277	-1.5%	1.3%
Publishing	\$4,465	\$4,388	1.8%	4.5%
Books	\$505	\$513	-1.5%	0.5%
Newspapers/Magazines	\$2,714	\$2,622	3.5%	2.7%
Comic Books/Strips	\$1,247	\$1,253	-0.5%	1.2%
Sports	\$14,109	\$13,437	5.0%	14.1%
Trademarks/Brands	\$26,850	\$26,314	2.0%	26.9%
Automotive/Motor Vehicle	\$4,018	\$3,920	2.5%	4.0%
Food/Beverage	\$7,268	\$7,022	3.5%	7.3%
Restaurants	\$4,557	\$4,424	3.0%	4.6%
Sporting Goods	\$1,317	\$1,310	0.5%	1.3%
Hardware, Appliance & Tool	\$2,722	\$2,681	1.5%	2.7%
Home-related	\$378	\$374	1.0%	0.4%
Electronics/Technology	\$3,125	\$3,063	2.0%	3.1%
Electronic Media	\$216	\$220	-1.5%	0.2%
Other	\$3,249	\$3,299	-1.5%	3.3%
Traditional Toys/Games	\$1,350	\$1,313	2.8%	1.4%
Videogames/Interactive/Online	\$574	\$598	-4.0%	0.6%
Other	\$773	\$769	0.5%	0.8%
TOTAL	\$99,870	\$97,471	2.5%	100.00%

* Numbers may not add up exactly due to rounding.

SOURCE: THE LICENSING LETTER

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At 2.8%, **Traditional Toys and Games** was the other property type to increase over the 2.5% industry average. But the gain was well below 2013's 4.3% growth.

Although the **Celebrities** segment was up 1.8% overall, it was a mixed bag. Entertainers/models increased 2.5%, even though one licensing agency described the sector as "saturated, fragmented and tired." Although "they keep coming out of the woodwork, chefs and home celebrities have definitely cooled off," growing just 1%. The biggest growth area is digital celebrities like fashion vlogger Bethany Mota, whose new retail line for mall store Aeropostale proved popular. In fact, while the individual licensing programs for digital celebrities aren't huge, the rapidly growing number of celebrities emerging from Youtube, Instagram, Pinterest, the blogosphere, and other sources has driven a rise of 3.0% for this portion of the celebrity sector, albeit from a small base.

Publishing grew 1.8%. The growth in this sector was fueled by the newspaper/magazines segment and exemplified by the development of lifestyle licensing programs built around magazine properties including *Seventeen* (Hearst exclusive to Sears for products for teens and millennials), and on-going programs such as the one for *Better Homes and Gardens* (Meredith with Walmart, focusing on outdoor and gardening products). "These deals represent the wave of the future for the magazine licensing business," says one licensing agent. On the downside, licensed sales of branded book properties fell 1.5%, despite the strong performance of young reader programs like Eric Carle.

Other property types that had flat or down years in 2014:

- ▶ Sales of licensed **Corporate Trademark** property goods grew 2.0%, as compared to 0.8% in 2013, thanks to strong sales in food/beverages (3.5%), restaurants (3.0%) and electronics/technology (2.0%). "We did better than last year but not as well as 2012," noted one licensing agent in the sector.
- ▶ **Video Games/Interactive/Online** fell 4% due to disappointing sales of Angry Birds (Rovio) branded goods. "Angry Birds is basically the entire video games property category at this point," according to a consultant. "Take it out of the equation and the segment would have actually increased in 2014 thanks to licensed sales of Call of Duty, Halo and Minecraft merchandise, whose programs are relatively small."
- ▶ **Music**, traditionally an "evergreen" category, fell 2.5% in 2014. Don't blame classic rock, "which stayed steady as always," according to one licensing agent. The decline was largely due to fall-off of younger acts that generated strong licensed sales over the last two years—especially One Direction and Justin Bieber. Although new acts will eventually take their place as they always do, rising stars Austin Mahone, 5 Seconds of Summer and Fifth Harmony were unable to fill the retail void in 2014.

2014 RETAIL SALES VARIED WIDELY

Individual respondents to the 38th Annual Licensing Letter Licensing Business Survey reported wildly varying results for their own businesses, even compared to other respondents in similar property types, product categories, geographic territories, etc.

In 2014, 68% of respondents doing business in the U.S. and Canada reported higher retail sales of licensed goods in those countries, 20% reported lower and 12% reported flat sales of licensed goods.

Among respondents reporting growth, 29% cited single-digit, 66% cited double-digit and 5% cited triple-digit growth; among respondents reporting falling sales, 24% cited single- and 76% double-digit declines.

Factors most frequently cited by respondents for increased sales were, in order: i. success of a particular industry or property, e.g., Frozen or Ninja Turtles; ii. entry into new markets or territories; iii. lower gas prices, unemployment and other favorable economic conditions; and vi. strong performance of e-commerce or another sales channel—although we also heard from many that believe the e-commerce effect is overstated.

Based on survey responses, performance of licensed goods was stronger in the U.S. than in Canada, particularly in the Northeast and Pacific Northwest; by contrast, the number of respondents describing Canadian sales as down or flat exceeded "up" responses by better than 2 to 1.

- ▶ After gaining 1.3% in 2013, **Estates** sales fell 1.0% in 2014. As in other sectors, retail success in estates was largely limited to a couple of dominant properties, notably Marilyn Monroe and Bob Marley. "The Marilyn business is incredibly successful in reinventing itself and staying fresh and in the public eye," notes one licensing consultant, citing "Lil' Marilyn" and the Norma Jean promotional campaign for Maybelline. Bob Marley, meanwhile, launched a new line of hemp apparel and announced new food and even marijuana lines for 2015.

Food/Beverage Leads Growth on the Products Side

On the products side, Food/Beverage remained dynamic posting sales increases for the fifth year in a row. The 6.0% gain was the third highest of any product category, behind only Toys/Games and Apparel. "There's more licensing of non-food brands for food products than ever before," explains one licensing agent. "It's not just chefs and restaurants. Entertainment companies and celebrities are now turning to food licensing," he says, citing new entries into the market from companies like CBS ("Cheers" beer) and celebrities like Justin Timberlake (Sauza 901 tequila for Beam Inc.).

There are also more licensed product offerings in the food and beverage space—everything from soup to coffee to sauces. But the real battlefield is in the frozen food aisle, another licensing agent adds. "Improvements in frozen food technology have improved quality and emboldened restaurants like P.F. Chang's, TGIF and Steak and Shake to see their brands associated with frozen foods." And because they've

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been selling so well, retailers like Target and Walmart are dedicating more space to licensed frozen foods.

Key Trends in Other Licensed Products

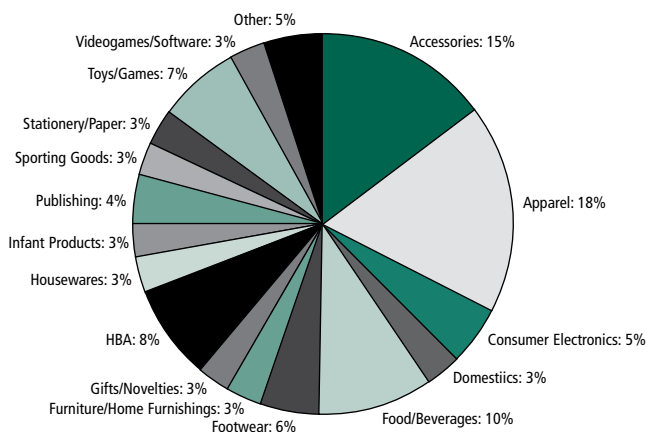
Other licensed product categories that did well in 2014 include:

- ▶ **Toys/Games** was the fastest growing product category posting a 7% increase (more than double last year’s 3.2% increase). The NPD Group estimated that sales of licensed toys outpaced overall toy sales in 2014 almost 2 to 1 (7% v. 4%). Of course, the Frozen factor had a lot to do with that, generating \$531 million in licensed toy sales with more than 300 different items on store shelves, according NPD estimates. But other big entertainment properties also had huge toy sales in 2014, including Spider-Man, Ninja Turtles, Batman and Power Rangers.
- ▶ **Apparel** was next with a 6.5% increase, due in part to strong sales of licensed men’s products. Between 2010 and 2015, online sales of menswear have grown an average of 17% per year, higher than any other retail category, according to research firm IbisWorld.
- ▶ **Sporting Goods** increased 4.5%, thanks to surging sales of sports apparel. “Branded yoga suits, sweats, socks and headphones are everywhere; they’ve gone from fitness equipment to wardrobe staples,” notes one licensee. However, fitness equipment, gear and hard goods were mostly flat or down, other than hunting, fishing and outdoor equipment.
- ▶ **Hardware/Paint** grew 3.0%. According to a licensing agent in the space, “2014 was a big year for the do-it-yourselfers.” Sales of licensed tools were up; and the few paint brands that were able to reach the shelf, like HGTV, were huge sellers.

- ▶ **Accessories** were up 2.7%. As competition for retail shelf space among apparel products intensifies, fashion houses are directing more licensing effort toward accessories. “Belts, socks, scarves and such take up less shelf space than apparel,” explains one licensor. Licensed accessory subcategories posting the greatest increase in U.S./Canada sales in 2014 were eyewear (3.5%), jewelry/watches (3.2%) and handbags (3.0%).
- ▶ **Automotive Accessories** bounced back after 2013’s 5.3% decline by posting a 2.0% gain in 2014. (The reversal was also mirrored on the property side with automotive accessories posting a 2.5% increase after

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RETAIL SALES OF LICENSED MERCHANDISE, BY PRODUCT CATEGORY, 2014, U.S./CANADA



NOTE: Numbers may not add up exactly due to rounding.
SOURCE: THE LICENSING LETTER

RETAIL SALES OF LICENSED MERCHANDISE 2014, BY PRODUCT CATEGORY (DOLLARS IN MILLIONS)

PRODUCT CATEGORY	RETAIL SALES, 2014	RETAIL SALES, 2013	CHANGE, 2013-2014	SHARE OF MARKET, 2014
Accessories	\$14,656	\$14,264	2.7%	14.7%
Eyewear	\$4,583	\$4,428	3.5%	4.6%
Handbags, Backpacks, Messenger Bags	\$2,071	\$2,010	3.0%	2.1%
Headwear	\$1,345	\$1,319	2.0%	1.3%
Hosiery	\$564	\$550	2.5%	0.6%
Jewelry and Watches	\$3,459	\$3,352	3.2%	3.5%
Luggage and Travel Accessories	\$1,423	\$1,395	2.0%	1.4%
Scarves and Ties	\$156	\$155	0.5%	0.2%
Other	\$1,055	\$1,055	0.0%	1.1%
Apparel	\$18,411	\$17,288	6.5%	18.4%
Consumer Electronics	\$5,232	\$5,079	3.0%	5.2%
Domestics	\$3,409	\$3,342	2.0%	3.4%
Food/Beverages	\$10,106	\$9,534	6.0%	10.1%
Footwear	\$5,469	\$5,415	1.0%	5.5%
Furniture/Home Furnishings	\$3,035	\$2,947	3.0%	3.0%
Gifts/Novelties	\$2,804	\$2,952	-5.0%	2.8%
HBA	\$7,756	\$7,911	-2.0%	7.8%
Fragrance	\$4,051	\$4,242	-4.5%	4.1%
Hair Accessories	\$267	\$265	0.8%	0.3%
Cosmetics/Nail Polish/Other	\$3,438	\$3,404	1.0%	3.4%
Housewares	\$2,827	\$2,785	1.5%	2.8%
Infant Products	\$2,690	\$2,663	1.0%	2.7%
Publishing	\$3,528	\$3,426	3.0%	3.5%
Sporting Goods	\$2,723	\$2,605	4.5%	2.7%
Stationery/Paper	\$2,526	\$2,618	-3.5%	2.5%
Toys/Games	\$6,965	\$6,510	7.0%	7.0%
Videogames/Software	\$2,930	\$3,184	-8.0%	2.9%
Other	\$4,803	\$4,948	-2.9%	4.8%
Hardware and Paint	\$313	\$303	3.0%	0.3%
Gardening	\$221	\$226	-2.0%	0.2%
Pet Products	\$402	\$410	-2.0%	0.4%
Funerary	\$9	\$10	-4.0%	0.0%
Automotive Accessories	\$372	\$365	2.0%	0.4%
Boats and Vehicles	\$519	\$516	0.5%	0.5%
Other	\$2,967	\$3,118	-4.8%	3.0%
TOTAL	\$99,870	\$97,471	2.5%	100.00%

* Numbers may not add up exactly due to rounding.
SOURCE: THE LICENSING LETTER

Licensing News

Properties Available Or Recently Assigned, U.S.

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
Harlem Globetrotters	American exhibition basketball team founded in 1926 that combines athleticism, theater, and comedy.	All	JJ Ahearn, Licensing Street
Terra Formars	Sci-fi/horror anime series follows a manned mission to Mars, where cockroaches sent to terraform the planet have mutated into giant, aggressive humanoids.		Daisuke Aoki, Viz Media
ZhuZhu Pets	American line of plush robotic hamster toys debuted in 2009 with \$2 billion in global retail sales; brand re-launching with new TV series.		Andrew Kerr, Corus Entertainment/ Nelvana Enterprises

Licenses Recently Granted, U.S.

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Animal Jam	Commonwealth Toy & Novelty	Master toy	WildWorks
Coco Rocha x Cinderella	HSN (Home Shopping Network)	Apparel	Disney Consumer Products, Wilhelmina Artist Management
Crayola	Fashion Angels	Activity products, arts & crafts	Crayola
Gold Toe	RFA Group	Slippers	Gildan Activewear
Goosebumps (film)	Outset Media	Activity games, board games, card games	Scholastic Media
	Rasta Imposta	Halloween costumes	
	S&G Apparel div. SG Companies	Sleepwear, slippers	
	SRM Idea Lab	Novelties	
	Trends International	Bookmarks, posters	
Hellboy	Rogue Ale & Spirits	Beer	Dark Horse Comics
I Dream of Jeannie	GreenLight*	Die-cast cars	Sony Pictures Consumer Products
	IGT	Video slot machines	
	Rubie's Costume*	Costumes	
	Tonner Doll	Fashion dolls	
	Trevco Sportswear*	T-shirts	
Kanye West	adidas Originals	Apparel, footwear, socks	Broadcast Music Inc. (BMI)
Marvel	Five Four Club	Fashion subscription service	Disney Consumer Products
Miles from Tomorrowland	TOMY	Toys	
Monster Jam	BioWorld Merchandising*	T-shirts	Feld Entertainment
	CSS Industries/Paper Magic	Valentines	
Nickelodeon	Sakar Intl.*	Youth electronics	Nickelodeon & Viacom Consumer Products
Paw Patrol	Kids Only/Moose Mountain	Inflatable play sets, tricycles	
	MEGA Brands	Paddleballs, stationery, stickers	
	Pacific Cycle div. Dorel Sports	Bicycle accessories, bicycles	
	PTI Group	Baskets	
	What Kids Want!	Novelties, outdoor toys	
Peanuts	Sakar Intl.	Youth electronics	Peanuts Worldwide
Route 66	SJT Enterprises	Wooden plaques	Tempting Brands AG
Star Wars	Hasbro	Electronic toys	Disney Consumer Products
Tehama Golf	Golf Warehouse (The, TGW)	Sportswear (adults')	FAM Brands
Trisha Yearwood	Klaussner Home Furnishings	Home decor	ACI Licensing
VeggieTales	CJ Products	Plush	Big Idea Entertainment

Licensing News *Continued from page 6*

International Properties Available or Recently Assigned

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
20th Century Fox	Portfolio of TV and film brands including "The Simpsons," "Family Guy," "Sons of Anarchy," "Ice Age," "Alvin and the Chipmunks," and "Avatar".	All (ANZ)	Alan Schauder, Merchantwise
Candy Crush Saga	Mobile app puzzle game. Representation includes sister title, Candy Crush Soda Saga.	All (Spain, Portugal, Italy)	Maria Sanguino, El Ocho Licencias Y Promociones SL
		All (France, Belgium)	Francoise Bouvet, MJA Licensing
		All (India)	Jiggy George, Dream Theatre Pvt. Ltd.
Doozers	Race of characters from live-action puppet TV series "Fraggle Rock," star in animated spin-off targeting kids 4-7 years-old.	All (Germany)	Anita van Esch, Active Merchandising
		All (France, Spain, Portugal)	Jordi Rey, Biplano (Barcelona)
		All (Italy)	Maurizio Distefano, Maurizio Distefano - The Evolution of Licensing
		All (Australia)	Gail Mitchell, Fusion Agency
La Guerre des Tuques-3D	Animated 3D film remake of the award-winning 1984 classic. Considered a part of Quebec's cultural patrimonial history.	All (Canada)	Stephen Fowler, Licensing Shop (The)
Llama Llama	Anna Dewdney's New York Times best-selling illustrated children's book franchise.	Accessories, apparel, bedding, food, toys (Worldwide)	Amy Moynihan Heyward, Genius Brands Intl.
Street Cat Named Bob (A)	Book tells the story of a struggling street musician whose life was transformed by a stray cat. Sold over 1 million copies in the U.K., and topped charts in over 30 countries.	Accessories, calendars, giftware, housewares, plush, t-shirts (EMEA)	Chris Today, Partnershop Agency Ltd. (The, TPA)

International Licenses Recently Granted

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Ancient Aliens	BioWorld Merchandising	Apparel (U.S., Canada)	A+E Television Networks
Corbert Gauthier	Chesta	Tapestries, wall decor (U.S., Canada)	MHS Licensing + Consulting
Cranston	DesignScapes	Gift bags (U.S., Canada)	
Discovery	BioWorld Merchandising	Apparel, bags, headwear, sleepwear (North America (excluding network-branded apparel))	Discovery Communications
	Wild Republic div. K&M Intl.*	Plush (North America)	
Doraemon	Beard Papa's/Muginoho USA	Desserts (North America, Latin America)	Viz Media
	JFC Intl.		
Elementary	Titan Publishing/Titan Entertainment	Books (U.K.)	CBS Consumer Products
Garfield	Fuky Csoki Kovács László Ev.	Candy (Czech Republic, Hungary, Romania)	Plus Licens Prague
	Hawley & Hazel Chemical Co.	Premiums (China (excluding Hong Kong))	Medialink Entertainment (Far East) Ltd.
	Hollywood Magic S.A.L.	Accessories, apparel (Algeria, Bahrain, Egypt, Iraq, Israel, Jordan, Kuwait, Lebanon, Libya, Morocco, Oman, Qatar, Saudi Arabia, Syria, Tunisia, UAE, Yemen)	20TOO
	Licensed Products Ltd.	Jelly beans (Czech Republic, Hungary, Romania)	Plus Licens Prague
	Lo Ting Kuang Co., Ltd./Lotus Bedding	Bedding, towels (Thailand)	Medialink Pacific Ltd.
	Loeb Uitgevers B.V.	Albums, books (Belgium, Luxembourg, Netherlands)	BN Licensing B.V.
Hautman Brothers	Planeta Editorial	Comic books (Spain)	Mendia Licensing
	Deluxebase Ltd.	Bags, drinkware, greeting cards, key chains, lenticular prints, magnets, postcards, stationery, wallets (Worldwide)	MHS Licensing + Consulting
James Meger	Deluxebase Ltd.	Bags, drinkware, greeting cards, key chains, lenticular prints, magnets, postcards, stationery, wallets (Worldwide)	MHS Licensing + Consulting
Josephine Kimberling	Dayspring Cards	Greeting cards (North America)	MHS Licensing + Consulting
	Design Design	Gift wrap, note cards (Worldwide)	
Karl Lagerfeld	Children's Worldwide Fashion SAS (CWF)	Apparel (children's) (France)	Karl Lagerfeld
Kate Spade New York	Fossil	Watches (Worldwide)	Kate Spade

*Extension or renewal.

Continued on page 8

Licensing News *Continued from page 7*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
KISS	Good Speed Inc.	Accessories, fashion apparel (Japan)	Epic Rights
	Hysteric Glamour	Jackets, jewelry, t-shirts (Japan)	
	Isshin Do Honpo Inc.	Face packs (Japan)	
	Licensing Essentials	Apparel (ANZ)	
	Scandinavian Travel Innovation AB	Luggage (Japan, Korea, Australia)	
La Guerre des Tuques-3D	Allstar Vending	Vending machine novelties (Canada)	Licensing Shop (The)
	Bayard Canada Livres	Master publishing (Canada)	
	Imports Dragon	Master toy (Canada)	
	Ketto Design	Back-to-school stationery, backpacks (Canada)	
	Kombi Sports	Cold weather accessories (Canada)	
	Lady Sandra Home Fashions	Home decor (Canada)	
Ladybird Books	kissmekwik	Greeting cards (U.K.)	Penguin Books Ltd.
	Lagoon Group	Games (U.K.)	
	Portico Designs	Gifts, stationery (U.K.)	
	Wooden Postcard Co. (The)	Wooden postcards (U.K.)	
Lily & Val	Portico Designs	Calendars, gifts, greeting cards, stationery (U.K.)	Meiklejohn Graphics Licensing (MGL)
Mighty Morphin Power Rangers	BioWorld Merchandising	Loungewear, sleepwear, underwear (North America)	Saban Brands
	Threadless	Limited edition t-shirts (North America)	
	Wiesner Products	Footwear (North America)	
Minions	JAKKS Pacific	Arcade games, bikes, inflatable play sets, outdoor furniture, storage bins, wagons (North America)	Universal Studios Partnerships & Licensing
Muhammad Ali	Under Armour	Accessories, apparel, footwear (Worldwide)	Authentic Brands Group
Northern Promotions	Canterbury Potteries	Ceramic mugs (U.S., Canada)	MHS Licensing + Consulting
	Chesta	Tapestries, wall decor (U.S., Canada)	
Peppa Pig	Crayola	Coloring & activity books (Australia)	eOne Licensing Australia
	Hunter Leisure	Furniture, wheeled toys (Australia)	
	Maxwell Foods	Raisins (Australia)	
	Portmeirion Group USA	Ceramic homewares (Australia)	
	Universal Brands	Bath & beauty products (Australia)	
Playboy	Love Artist Ltd.	Limited edition prints (U.K., Ireland)	Playboy Enterprises
	Shanghai Yunteng Leather Goods Co., Ltd.	Shoes (women's) (China (excluding Taiwan, Hong Kong, Macao))	
	Socks World Intl. Ltd.	Footlets, socks (U.K.)	
	Sunny Inc.	Co-branded accessories, co-branded apparel (Japan)	
	Young Shine	Home & decorative accessories, home gadgets, kitchenware (Taiwan)	
Power Rangers	Fisher-Price	Preschool toys (North America)	Saban Brands
Power Rangers Dino Charge	Bentex Group	Swimwear (boys') (North America)	
	Franco Manufacturing	Bedding (children's), home decor (North America)	
	Intimo	Sleepwear (North America)	
	Kids With Character	Outerwear, sportswear (North America)	
Powerpuff Girls (The, 2016 reboot)	Spin Master	Master toy (Worldwide)	Cartoon Network Enterprises
Smiley	Superior Holdings Co., Ltd.	Footwear, sportswear (Worldwide)	SmileyWorld/Smiley APAC Ltd.
Talking Tom & Friends	SongsWithMyName Services	Personalized music (North America)	Bulldog Licensing
	YouTube div. Google	Mobile apps (iOS & Android) (Worldwide)	Outfit7
Teletubbies	VTech Electronics Europe Plc	Electronic toys (U.K., France, Germany, Benelux, Iberia, ANZ)	DHX Media
Thunderbirds Are Go	BeyondTheStory	Mobile apps (Worldwide)	ITV Studios Global Entertainment
Top Gear	Topps Europe Ltd.	Trading cards (U.K.)	BBC Worldwide
Yo-Kai Watch	Hasbro	Toys (North America, Latin America, Europe, ANZ)	Dentsu Entertainment USA

*Extension or renewal.



contacts & connections

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Authentic Brands Group, Nick Woodhouse, President & CMO, 212-760-2411, nwoodhouse@abg-nyc.com, P. 8.

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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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Single-Serving Products

Continued from page 1

And single-cup coffee consumption in Europe is more than double North American levels.

The Casualties of Single-Serving Coffee

All in all, single-serving coffee is not a bad business to be in. But it's not all pretty, either. Single-serving coffee products have cut deeply into sales of traditional coffee products—the old staple tin coffee cans from venerable brands that used to occupy entire aisles of the supermarket.

The single-serving coffee has also made life even tougher for local gourmet coffee shops and specialty food stores. Now you can get all the gourmet coffee you'd ever crave from a K-cup.

The Democratization of the Single-Serving Market

As the patent holder, Keurig Green Mountain was the company that made the most money from the K-cup. But in 2012, the patent expired and the door was open to competition. Soon the market was awash with single-serving products.

All of this provided fertile grounds for licensing with brands like Starbucks, Dunkin Donuts and Newman's Own joining the scramble, not to mention "K-cup" product versions from legacy brands such as Folger's, Taster's Choice and Maxwell House.

Although Keurig remains the leader, the market for single-serving coffee has been democratized and dominated by licensed brands, including brands licensed by Keurig itself, as illustrated by the following table:

TOP 10 SINGLE-SERVING COFFEE SALES BY BRAND IN 2014		
RANK	BRAND	2014 SALES (IN MILLIONS OF DOLLARS)
1	Keurig Green Mountain	\$545.72
2	Starbucks	\$348.92
3	Folgers Gourmet Selections (J.M. Smucker)	\$314.10
4	Private label	\$274.03
5	Donut House Collection (Keurig Green Mountain)	\$161.18
6	Keurig Eight O'Clock (Tata Global Beverages)	\$123.72
7	Gevalia (Kraft Foods)	\$115.64
8	Keurig Newman's Own Organics	\$109.99
9	Maxwell House Café Collections (Kraft Foods)	\$102.44
10	Donut Shop (Keurig Green Mountain)	\$85.80

SOURCE: STATISTA FOR YEAR ENDED JULY 13, 2014

Retail Sales of Licensed Goods

Continued from page 5

a 2013 decline of 0.6%.) "Customize-your-car shows on TV are fueling the demand for licensed accessories and licensors, including luxury auto brands like Mercedes and companies outside the automotive sector, are supplying the licensed products to satisfy it," summed up one licensing agent.

Product categories that did poorly in 2014 U.S./Canada sales include:

- ▶ **Gifts/Novelties:** Alas, not even the Frozen factor could keep sales of licensed products in this category from declining for the fourth year in a row. This year's 5.0% loss was almost 10% bigger than 2013's 4.5% decline. "Because it's so dependent on impulse purchases, decline in foot traffic and growth in DTR and e-sales is killing the gifts industry," explains one licensee.
- ▶ **Videogames/Software,** for the second year in a row, had the biggest decrease of any property category, -8.0%. Factors for the continuing decline include the fact that we are in a transition period to the next generation of consoles (although NFL games did just fine with the PS4 and Xbox consoles), the lack of new NCAA titles from EA and growing popularity of low-price (or free) mobile games and apps.
- ▶ **Stationery/Paper** declined 3.5%, the sector's fifth straight negative year. Observers and survey respondents agreed that retail sales of licensed party goods were way down in 2014—although some cited Sesame Street as an exception.

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SURVEY METHODOLOGY

TLL's estimate of the size of the licensing business is based on its online survey of global licensing executives, conducted in January 2015; third-party research of overall category and industry size; dozens of in-depth interviews with licensing executives, both for the survey and throughout the year; annual reports and other corporate information from retailers, licensors and licensees; and news articles from trade publications covering trends in the respective product categories and property types affected by licensing.

Experts interviewed included licensors, manufacturers, agents and retailers, as well as consultants, allied professionals and individuals with multiple roles. They were based in all territories around the globe; but for this portion of the survey which focuses only on the U.S. and Canada, results are based only on responses of those doing business in those territories.

More results from TLL's *Annual Licensing Business Survey* will be forthcoming in future issues, including trends in royalty rates and payment structures, distribution trends and product category results by key property types for U.S. and Canada, as well as coverage of the size of the global licensing business and trends in territories outside the U.S. and Canada.

Retail Sales of Licensed Goods

Continued from page 11

Increased Competition

More licensed products, consolidation of retailers, less retail space. These are by far, the most commonly cited themes of respondents, as they have been for the past 20+ years. Even though the retail licensing pie is steadily growing, the field keeps getting more crowded and subject to domination by the giants. The evolution of licensing is really the story of how licensees and licensors are experiencing and adapting to this growing competition.

Optimism for 2015

Most respondents doing licensing business in the U.S. and Canada had a good year in 2014; about one in three had a bad year. But when it came to the future, there was general optimism. 75% of respondents said they expect their licensing business to grow in 2015. Among these respondents, 40% projected increases of between 10% and 20%. Only 8% said they expect their business to decline next year.

Who's News

Anne Globe is the new chief marketing officer for Skydance Productions and will head up marketing, publicity, licensing and promotion of the five-year-old company's brands including 2015 releases "Terminator: Genisys" and "Mission: Impossible 5."

Brand Central promotes two key employees: **Jodi Bogdanoff** to vice president of licensing responsible for overseeing the agency's food and beverage product programs including Dr Pepper Snapple Group, ABC's the "MasterChef" and farm-to-table producer Beekman 1802; and **Nancy Sanieoff** to senior licensing manager in the manufacturers division.

Patrice Paglia, a seasoned exec with over 25 years of licensing experience, rejoins Precious Moments Inc. as Licensing Director. PMI is the exclusive owner and licensor of the Precious Moment artwork of Sam Butcher.

Robert Marick is the Discovery Consumer Products's new vice president of North American licensing and global location-based entertainment where he will draw on his over 20 years of experience with entertainment and consumer packed heavyweights like Disney, Fox, Time Warner and Mattel.

Percy3DMedia hires **Jadyn Rosario** to the newly created position of director of licensing, and **Liz Ridout** as vice president of marketing and sales. Percy3D's PercyVites platform enables fans to create 3D animated videos e-vites using customized photos and licensed entertainment characters like Caillou and Arthur.

Drew Sheinman is joining talent agency IMG as senior vice president of licensing and will oversee key elements of the agency's North America licensing operations.

Richard Radford, a former Roy Lowe & Sons executive, is now group sales director for independent publisher, Centum Books, where he will be responsible for developing new licensing and branding opportunities and recruiting new clients for the company's content portfolio.

Stephanie McMahon, Chief Brand Officer of WWE, is among three company senior managers named to the WWE Board of Directors.

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