

TLL THE LICENSING LETTER

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Average Royalty Rates in U.S. & Canada Steady for Decade; Entertainment Fees Climb, Guarantees & Advances Flat

Royalties on licensed retail goods in U.S. and Canada in 2014 represented the picture of long-term stability, capping a decade-long trend of little to no movement. The average royalty in 2014 was 8.68%, compared to 8.67% in 2013, a change of just 0.01%. Since 2005, the average royalty rate across property types and product categories has been in the 8.6% to 8.8% range.

More than half (56%) of respondents to *TLL's Annual Licensing Business Survey* this year reported that royalties were flat in 2014 compared to 2013, with 29% saying that their average royalty increased (two-thirds of the time by 5% or less), and 15% saying they decreased (with most of the declines in the one- to three-point range). A very discerning eye might see the subtlest hint of upward movement compared to 2013, when 62% of respondents said payments were flat and only 20% reported increases, most often of only one or two points.

However, one place where 2014 did diverge from recent trends was with regard to guarantees. Recent patterns have been for guarantees to decline as royalties remained steady. But in 2014, guarantees were just as flat as royalties, with almost half of respondents (48%) reporting no change in average guarantees. The rest of the respondents were evenly split, with about one quarter (23%) of all respondents reporting decreases in dollar value of the average guarantee range and another quarter (23%) reporting increases in guarantees.

Entertainment Royalties Make Biggest Jump

Changes to average royalties were slight across individual property types and product categories. **Entertainment/character**, for the second year in a row, was the property type with the highest rise in average royalties, increasing from 9.43% in 2013 to 9.70%. The percentage gain, at 2.9%, was more than twice 2013's 1.2% increase. As they did in 2013, many of the respondents reporting increases attributed the

rise in royalties to platinum properties, particularly those owned by Disney, which commands unequaled market share since it added Marvel and Star Wars to its existing Disney brands through acquisitions over the past five years.

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LICENSING SALES

Online & Value Channels Grow Share of Licensed Product Sales

Sales of licensed retail products in the e-commerce channel accelerated in 2014, while most other retail channels continued in a characteristically steady vein, gaining or losing just a fraction of one percentage point in market share, according to *TLL's Annual Licensing Business Survey*.

While the changes in market share changes are mostly very small, the dollars involved are not. With retail sales of licensed merchandise in the U.S. and Canada accounting for just a hair under \$100 billion in 2014, a one-tenth of a percent change represents \$100 million.

Sales of licensed products in the e-commerce/online channel, including mobile, are growing at almost twice the rate of overall online sales. This channel saw its share of market increase 1.5 percentage points, from 8.5% to 10.0% of all retail sales of licensed products. That translates to a 17.6% relative increase in both market share and dollar volume.

According to Forrester Research, overall online retail sales account for about 9% of U.S. retail sales, and are expected to grow at a compound annual growth rate of 9.5% between 2013 and 2018. Key factors in this growth include the increased penetration of smartphones and tablets, and a continuing share shift to the e-commerce channel as shoppers follow aggressive promotions by online merchants.

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➡ Licensing Ledger

BAD YEAR FOR "ANGRY BIRDS"

Rovio Entertainment, creator of Angry Birds, saw its consumer product licensing revenues fall from €71.3 million in 2013 to €41.4 million in 2014, according to company financial reports. Disappointing Angry Birds' licensed goods sales took down not only Rovio but the entire Video/Games/Interactive/Online property type category, which fell 4% in U.S. and Canada, according to TLL's *Annual Business Licensing Survey*. With just \$574 million in sales, Video Games is the smallest sector and Angry Birds is pretty much the whole category. "Take Angry Birds out of the equation and the segment would have actually increased in 2014 thanks to licensed sales of Call of Duty (**Activision**), Halo and Minecraft (**Microsoft**) merchandise," notes one licensing consultant.

SEGA EXPANDS SONIC BOOM

Sega of America unveiled a host of new licensing and promotional deals involving its Sonic Boom game property, including:

- ▶ **World Tech Toys** for remote-controlled helicopters
- ▶ **Bulls I Toy** for erasers, stickers, trading cards and other novelties
- ▶ **teNeues Publishing Group** for wall calendars
- ▶ **Rubie's Costume** for costumes
- ▶ **Bakery Crafts/Jack Guttman** for cake decoration kits.

'AVENGERS' CAMPAIGN TARGETS FASHION, HEALTH

Disney Consumer Products announced what it's calling one of "its biggest ever licensing programs" around the new "Avengers: Age of Ultron" film and offshoot programming; and given Disney's track record, that's no idle boast. The licensing program includes a push into what the studio considers high-potential categories, including female fashion and items intended to foster active and healthy habits among kids. Licensing partners in the "healthy lifestyle" area include **Under Armour**, **Sage Fruit**, **Conagra Foods** (granola bars), **Crunch Pak** and **Chobani**. Disney/Marvel's "Avengers: Age of Ultron," which opens in theaters May 1, is expected to be one of the biggest forces at the box office and at retail this year (along with **Amblin/Universal's** "Jurassic World," **Illumination/**

Universal's "Minions" and **Lucasfilm/Disney's** "Star Wars: The Force Awakens").

ADIDAS TO GIVE UP NBA SPONSORSHIP

After 11 years of being the official apparel sponsor of the NBA, **Adidas** announced that it will not seek to renew its status after the 2016-2017 season. According to several reports, the announcement came about a week after the League told Adidas that it would open the bidding to other brands like **Nike** and **Under Armour**. *Result:* Renewing the license would have likely cost Adidas a lot more than the \$400 million it paid in 2006 to secure it.

MLB & MAJESTIC RE-UP

Continuing a partnership that started in 1982, **Majestic Athletic** will remain the uniform licensee of **Major League Baseball Properties** through 2019 with exclusive rights to design, produce and distribute on-field uniforms, Authentic Collection apparel, replica jerseys and other men's and women's fan apparel for all 30 MLB teams. MLB jersey sales were strong in 2014, despite the absence of perennial national favorites the New York Yankees and Boston Red Sox from postseason, thanks to the success of regional teams like the **KC Royals** and **SF Giants**.

CLASS ACTION LAWSUIT AGAINST FACEBOOK

A federal judge in California said a lawsuit by hundreds of thousands

of parents nationwide against Facebook could go forward as a class action. The suit contends that Facebook let kids use their parents' credit and debit cards to buy the virtual currency Facebook Credits and violated California law by citing its "all sales are final" policy in refusing refunds to parents who complained. Facebook denies all charges. The ruling simply means that the parents can sue collectively as a class. They still have to prove their claims are substantively true when the case goes to trial in October.

TACO BELL LICENSING CRUNCH

Taco Bell has become a hot bed of food licensing and co-branding featuring **Snapple** Lemonade Freeze (**Dr Pepper Snapple Group**), **Starburst Strawberry Freeze** (**Wm. Wrigley Jr.**), in addition to **Doritos Locos Tacos** and the **Cap'n Crunch Delights**, basically a doughnut hole covered with **Quaker Oats Co.'s** Cap'n Crunch Crunch Berries cereal and filled with "milk" icing (**PepsiCo**). *Nation's Restaurant News* describes the latter as Taco Bell's variation on **Cinnabon Delights**, a cream-filled doughnut hole reminiscent of Cinnabon's cinnamon rolls, that debuted when Taco Bell rolled out breakfast nationwide last year. Cinnabon has reportedly developed its licensing business into a \$750 million revenue stream, triple its earnings from selling rolls at its own storefronts. Meanwhile, the Taco Bell goodies which were available as test items only in Bakersfield, Calif., have gone viral since being profiled in the Food Beast blog.

MARTHA GOES TO THE DOGS

Martha Stewart Living Omnimedia released a new line of natural dog treats exclusively at **PetSmart**. The **Martha Stewart Pets Treat Shop** line is available in five flavors and was supposedly inspired by the biscuits the duchess of the domestic makes for her own pooches.



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Average Royalty Rates

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“Definitely on the entertainment/character front—from Nickelodeon to Disney,” there have been royalty increases, one licensee says. “Any brand that is showing marked success will be able to leverage that on the royalty end.” “Disney brands all raised their royalty percentage,” comments another respondent.

Royalties Trends of Other Property Types

Sports is one of the other property type respondents cited for increases in average royalty rates in 2014, though the increase was just 0.2%. At 10.0% (up from 9.98% in 2013), sports is the property type with the second highest average royalty, trailing only celebrities, which remained flat at 10.31% in 2014.

Fashion, music & collegiate were also reported as having higher average royalty rates in 2014, albeit below 1% in each case. Fashion had the second largest increase of

any property type, behind only entertainment, with a 0.5% percentage rise in average royalty from 8.46% in 2013 to 8.50% in 2014.

Publishing saw its average royalty rates fall the most, declining 1.5% to 8.55%, compared with 8.68% in 2013. It was the only property type with a decline above 1.0%. Declines in average royalty rates were also reported for three other property types in 2014:

- ▶ **Art** declined from 6.30% to 6.25%;
- ▶ **Estate** properties fell from 9.70% to 9.65%; and
- ▶ **Non-profit** dropped from 8.34% to 8.30%

Almost one-third of the 13 major property types tracked by *TLL* saw no change at all in average royalties.

Royalty Trends by Product Category

On the product category side, for the second year in a row, **apparel** goods had the highest increase in average

PRODUCT CATEGORY	AVERAGE ROYALTY, 2014	AVERAGE ROYALTY, 2013	PERCENT CHANGE, 2013-2014	RANGE OF ROYALTIES, 2014
Art	6.25%	6.30%	-0.8%	4%-12%
Art and Artists	6.35%	6.43%	-1.2%	4%-12%
Museums	6.15%	6.18%	-0.5%	4%-15%
Celebrities	10.31%	10.31%	0.0%	3%-18%
Entertainers/Models	10.44%	10.44%	0.0%	4%-16%
Chefs/Home-Related	9.74%	9.74%	0.0%	2%-18%
Collegiate	10.00%	9.97%	0.3%	5%-18%
Entertainment/Character	9.70%	9.43%	2.9%	4%-18%
Estates	9.65%	9.70%	-0.5%	4%-18%
Fashion	8.50%	8.46%	0.5%	2%-16%
Apparel	8.40%	8.37%	0.4%	5%-16%
Footwear	7.13%	7.13%	0.0%	2%-14%
Home	7.50%	7.46%	0.5%	2%-14%
Music	8.28%	8.26%	0.2%	4%-20%
Non-profit	8.30%	8.34%	-0.5%	4%-14%
Publishing	8.55%	8.68%	-1.5%	2%-18%
Books	7.94%	7.96%	-0.3%	6%-14%
Newspapers/Magazines	8.17%	8.15%	0.2%	2%-12%
Comic Books/Strips	9.55%	9.60%	-0.5%	5%-18%
Sports	10.00%	9.98%	0.2%	5%-18%
Trademarks/Brands	7.78%	7.78%	0.0%	1%-16%
Automotive/Motor Vehicle	4.09%	4.09%	0.0%	1%-16%
Food/Beverage	5.53%	5.53%	0.0%	1%-10%
Restaurants	5.91%	5.91%	0.0%	4%-8%
Sporting Goods	7.01%	7.01%	0.0%	6%-14%
Traditional Toys/Games	8.16%	8.16%	0.0%	5%-12%
Videogames/Interactive/Online	8.91%	8.91%	0.0%	6%-15%
OVERALL AVERAGE	8.68%	8.67%	0.1%	1%-20%

SOURCE: THE LICENSING LETTER

PRODUCT CATEGORY	AVERAGE ROYALTY, 2014	AVERAGE ROYALTY, 2013	PERCENT CHANGE, 2013-2014	RANGE OF ROYALTIES, 2014
Accessories	9.15%	9.12%	0.3%	3%-18%
Eyewear	8.28%	8.23%	0.6%	5%-16%
Handbags, Backpacks, Messenger Bags	9.00%	8.90%	1.1%	5%-18%
Headwear	9.80%	9.76%	0.4%	7%-14%
Hosiery	8.59%	8.59%	0.0%	5%-14%
Jewelry and Watches	7.75%	7.73%	0.3%	3%-18%
Luggage and Travel Accessories	10.15%	10.15%	0.0%	5%-18%
Scarves and Ties	7.33%	7.33%	0.0%	5%-14%
Apparel	9.50%	9.44%	0.6%	5%-18%
Consumer Electronics	5.25%	5.25%	0.0%	3%-10%
Domestics	8.85%	8.85%	0.0%	4%-14%
Food/Beverages	5.95%	5.93%	0.3%	1%-12%
Footwear	8.19%	8.19%	0.0%	3%-16%
Furniture/Home Furnishings	7.51%	7.51%	0.0%	3%-14%
Gifts/Novelties	8.70%	8.76%	-0.7%	4%-15%
HBA	8.99%	8.99%	0.0%	5%-14%
Fragrance	9.29%	9.29%	0.0%	5%-18%
Cosmetics/Hair Accessories/Other	8.43%	8.43%	0.0%	6%-14%
Housewares	6.28%	6.28%	0.0%	3%-14%
Infant Products	8.70%	8.70%	0.0%	5%-14%
Publishing	9.73%	9.73%	0.0%	5%-15%
Sporting Goods	9.81%	9.81%	0.0%	4%-15%
Stationery/Paper	9.00%	9.09%	-1.0%	4%-12%
Toys/Games	10.40%	10.37%	0.3%	5%-20%
Videogames/Software	10.45%	10.41%	0.4%	1%-20%
OVERALL AVERAGE	8.68%	8.67%	0.1%	1%-20%

SOURCE: THE LICENSING LETTER

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royalties in 2014, growing 0.6% from 9.44% to 9.50%. Next came **video games and software**, whose average royalty rose from 10.41% to 10.45%, a change of 0.4%.

Other product categories in which royalties rose were **accessories, food/beverage** and **toys/games**. The percentage change in each of these categories was about one-third of one percent. **Gifts/novelties** and **stationery/paper** were the only two product categories in which the average royalty dropped.

Almost half of the 16 major product categories tracked by TLL saw no change in average royalties in 2014.

Royalties Mirror Larger Licensed Sales Trends

Across both property types and product classifications, the relative increases and decreases in average royalties reflect the performance of retail sales of licensed goods in respective sectors in 2014. As a rule, the sectors performing the best in sales had slight increases in average royalty rates; and the sectors with weaker retail sales had slight decreases in royalties.

For instance, the product category that had the most dramatic change in average royalties in 2014 was stationery/paper, which dropped by 1.0%, from 9.09% to 9.00%. Sales of licensed stationery and paper goods also fell 3.5% in 2014; meanwhile, gifts/novelties royalties, which experienced a 5.0% decrease in retail sales in 2014, also had lower average royalties for the year.

Survey respondents identify the U.S. as the region in which royalty rates fluctuated (either up or down) the most. However, the survey shows that the range of royalties actually narrowed within some property types and product categories, with these bucking the trend toward wider ranges over the last several years.

Guarantees & Advances Also Flat

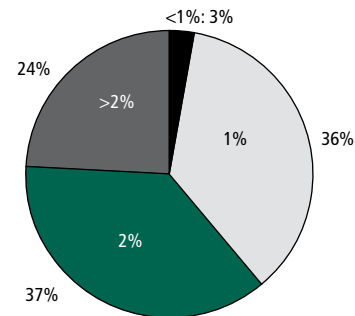
Minimum guarantees generally remained flat in most categories. But there was movement in certain property types. Entertainment/character was the property type that respondents identified as the most likely to have fluctuated during 2014.

As with royalties, the Disney factor appears behind the movement in entertainment/character guarantees. "Brands in the Disney universe are extremely hot right now and are getting higher MG's because they can," one licensee explains. "I think they are an anomaly and we are actually seeing a lot more 'wiggle room' with other brands."

One licensing agent alluded to licensee push back against guarantees and the effect that has on agencies. "Licensees are increasingly balking at paying guarantees, especially for lesser known character properties," this agent comments. "[This] makes things difficult for agents who rely on guarantees and advances for operating cash flow."

The trend in advances mirrored guarantees, with 53% of survey respondents saying they were flat year-on-year, compared to 26% reporting increases in advances and 18% reporting decreases. Following the themes of higher

AVERAGE CONTRIBUTION TO CENTRAL MARKETING FUND, AS PERCENTAGE OF NET SALES (2014) (AMONG THOSE CONTRIBUTING TO CMF)



SOURCE: THE LICENSING LETTER

royalties and guarantees in the entertainment sector driven by Disney, most reported increases in advances were in the entertainment/character property type.

Fewer Marketing Requirements Imposed

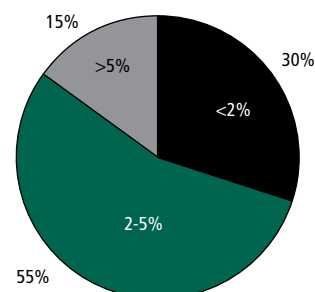
The percentage of respondents saying that they pay into or require a contribution to a central marketing fund (CMF) actually fell from 52% in 2013 to 45% in 2014.

Roughly the same percentage of survey participants (42%) report that they are required to commit a percentage of annual wholesale or net sales to their own advertising or marketing of the license (or require such a contribution).

It should be noted that these figures are likely to be higher than is actually the case for the licensing business as a whole. This is, perhaps, because the respondents who answered the questions about marketing contributions were skewed toward property types where such requirements are more common, such as corporate trademarks, fashion, sports, and entertainment/character.

Among respondents who report making a CMF contribution, about three-quarters say it was 2% or less, while one-quarter report an average above 2% of net sales. For

AVERAGE REQUIRED TO LICENSE ADVERTISING, AS A PERCENTAGE OF NET OR WHOLESALE SALES (EXCLUDES THOSE NOT REPORTING A COMMITMENT)



SOURCE: THE LICENSING LETTER

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annual marketing commitments, respondents report a range of 1% to 10% (of either net sales or wholesale), with the most commonly reported amounts (cited by 55% of respondents) being in the 2% to 5% range.

Other licensee marketing contributions cited by survey respondents—sometimes in combination with one or both of the above—include requirements to:

- ▶ Participate in trade shows and consumer exhibitions;
- ▶ Buy TV advertising; and/or
- ▶ Market their products in licensor-controlled venues such as Web sites and comic books

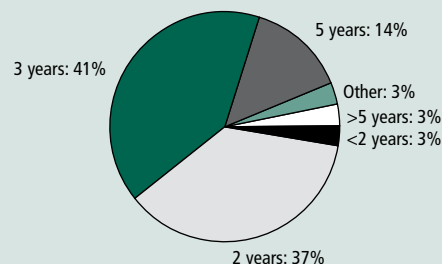
While the U.S. fluctuated most in terms of royalties, the distinction for most in flux region in terms of guarantees went to Europe (40%).

“Europe is definitely pushing for higher guarantees than in the past. Part of that is because with so many countries, MG’s need to be allocated to each individual region or territory to make sense from a business perspective,” comments one licensee. Others, however, remark that guarantees were down in European countries.

THREE YEARS MOST POPULAR CONTRACT TERM

Survey participants say that contract lengths in 2014 were, on average, steady from 2013, with more than four-fifths (84%) of respondents saying so, versus 11% saying the average length increased and 5% saying it decreased. The largest percentage of respondents (41%) say their average contracts were three years, followed by 37% who say the average was two years; 17% report their average contracts signed in 2014 were five years or longer in length.

AVERAGE LENGTH OF NEW LICENSING AGREEMENTS, 2014



SOURCE: THE LICENSING LETTER

THE FASHION SECTOR

Mass Retail Fashion Licensing Targets Men

Very quietly and with little fanfare, mass retailer Target launched Target Collective, a curated collection of American-made men’s fashion products from six different designers:

- ▶ Billykirk (bags and accessories);
- ▶ Owen & Fred (soap and accessories);
- ▶ Taylor Stitch (casual wear);
- ▶ Duluth Pack (bags);
- ▶ Locally Grown (T-shirts and hats); and
- ▶ Terrapin Stationers (note cards).

The collection became available exclusively on Target.com on Sunday, March 15. Product prices range from \$8 for a pack of “Cool Story Bro” cards from Terrapin to \$270 for a leather and canvas briefcase from Duluth Pack. Some, but not all, of the items are reportedly exclusives for Target.

A Shift in Strategy

The collaboration between fashion designers and mass retailers like Target is nothing new. But what make this new Target collection different—at least for Target—is that it targets men rather than women. The online-only launch strategy also represents a departure for Target.

Fast Company immediately proclaimed that the retailer was jumping on the “lumbersexual” trend, appealing to the bearded, flannel-wearing outdoorsy-looking man. Other observers, meanwhile, focused on the quietness of the launch and the fact that it was limited to the electronic realm.

“We kept it low key,” a Target spokeswoman told the *Star Tribune*. “This program is a new twist on the traditional designer collaboration. It’s a test and learn.”

Growth in Men’s Fashion

According to the research firm IbisWorld, online sales of menswear grew an average of 17% per year from 2010 to 2015, highest of any retail category; double digit average annual growth is also expected to continue for the next five years, according to the Ibis study.

On a separate but related note, The NPD Group credited double-digit sales growth in bags worn by men with stabilizing the \$11.5 billion U.S. accessory bag market in 2014.

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Licensing News

Properties Available Or Recently Assigned, U.S.

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
Furmaids	Magical animals that transform into mermaids; brand features themes of transformation, exploration, and cooperation. In development with Flux Animation Studio.	Toys	Ashley Mady, Brandberry
General Mills	Portfolio includes Pillsbury, Green Giant, Betty Crocker, and Cheerios.	Accessories, apparel, beauty supplies, crafts, gifts, home goods	Cindy Birdsong, Brand Licensing Team
Jesse James Decker	Country singer and reality TV personality seeking partnerships focused on mom, baby, and family.	Health & beauty aids	Brian Dow, Agency for the Performing Arts (APA)
Legendary Hatfield & McCoy Family (The)	Brand based in the history of a 150-year feud between two Appalachian clans, whose descendants have come together to preserve authentic traditions, recipes, and craftsmanship.	All	Michael Gottsegen, All-American Licensing & Management Group (AALMG)
Lonely Planet	Travel media brand with over 120 million books published to almost every destination on the planet. Seeking international agents.	All	Drew Rowley, Lonely Planet
Sports Afield	Outdoor enthusiast magazine and television brand reaches over 31 million households across the U.S.; currently licensed in apparel and calendars.	Apparel, games, home decor & furnishings, pet products	Bobbie Hunnicutt, Blue Trellis
Sticks Object Art & Furniture	Homewares brand known for its lines of furniture, accessories, and object art marked by individuality and creativity.	All	
Thomas Kinkadee	American painter known for his realistic, bucolic, and idyllic subjects.	Accessories, apparel, furniture, home decor, pet products	Kirsten Fallon, IQ License

Licenses Recently Granted, U.S.

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
AmiGami	Viddiverse	Digital content	Mattel
An American in Paris	Euro Ceramica	Tabletop accessories	Parham Santana
Betty Crocker	Nifty Home Products	Bakeware, cookware accessories	General Mills, JRL Group
Boppy	Rashti & Rashti div. HJ Rashti & Co.	Bedding (infants'), blankets (infants'), layette, plush (infants')	Brandgenuity
Cinderella (2015 film)	Gelish/Hand & Nail Harmony	Nail polish	Disney Consumer Products
	KIDdesigns	Consumer electronics	
	MAC Cosmetics	Makeup	
Deer Little Forest	Playrific	Mobile apps (iOS & Android)	Koko Media
Divergent Series: Insurgent (The)	Samsung Electronics	Virtual reality content	Lionsgate
DOG for DOG	Bow Wow Pets div. European Home Designs	Pet products	All-American Licensing & Management Group (AALMG)
Encyclopaedia Britannica	Great Big Canvas	Canvas prints, wall art	JRL Group
Fast & Furious	Microsoft	Video games (Xbox 360, Xbox One)	Universal Studios Partnerships & Licensing
Goodyear	Kent Intl.	Bicycle tires & tubes	Goodyear Tires & Rubber Co.
Grumpy Cat	American Greetings	Greeting cards	A Weird Movie
	Maud Borup	Confectionery, food	
	Zynga	Online casino games	
Kate Spade New York	DWI Holdings	Bath, bedding	Kate Spade & Co.
	E.J. Victor	Furniture	
	Jaipur Rugs	Rugs	
	Kravet	Fabric, wallpaper	
Krispy Kreme	Massimo Zanetti Beverage U.S.A.	Coffee products, k-cups	Brand Central
Marvel	Select Brands	Small kitchen appliances	Disney Consumer Products
Mary Blair	Pinup Girl Clothing	Apparel	Firefly Brand Management
Mindy Weiss	Wedding Paper Divas div. Shutterfly	Wedding stationery	Beanstalk
Monopoly Millionaires' Club	Scientific Games	Lottery tickets	Hasbro
Monster Jam	Lowe's	Themed events	Feld Entertainment
PepsiCo	Body Rags Clothing Co.	T-shirts	Joester Loria Group

*Extension or renewal.

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Licensing News *Continued from page 6*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Rosanna Pansino	Wilton Enterprises	Baking tutorials	Kin Community
SpongeBob SquarePants	Vandor	Tote bags, travel mugs, water bottles	Nickelodeon & Viacom Consumer Products
Squredy Cats	Totally Toys	Master toy	Brandberry
Tapatio Hot Sauce	Costume Evolution	Halloween costumes	Firefly Brand Management
	Fiesta Toy	Capes, inflatable bottles, plush	
	Frost Productions	Lottery tickets	
	Mighty Fine	Apparel (adults'), t-shirts	
	Socksmith	Socks	
	Zynga	Casino games	
TKO	Majesty Brands	Socks	IQ License
Westinghouse	Camelion Battery/A Power Holdings Ltd.	Batteries, battery chargers, mobile power	Leveraged Marketing Corp. of America (LMCA)
WWE	Topix Media Lab Publishing	Magazines	World Wrestling Entertainment (WWE)

International Properties Available or Recently Assigned

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
Elie's Puzzle Pet Friends	Children's book-based property targeted to 7–10 year-olds. Follows the adventures of a boy and two puzzle pets who come alive when assembled.	Apparel, plush, publishing (Worldwide)	Sondra Contino, Lawless Entertainment
Erté/Romain de Tiroff	Several hundred illustrative designs from the "father of art deco."	Luxury products (Worldwide)	Shelley Rosen, Airlift Ideas
Football Association (The)	Governing body of soccer in England. Managing own licensing program for the first time.	All (U.K.)	Nicky Stanton, Football Association (The, FA)
Maya Studio	Art brands Mexican Skulls, Bad Day, Buds, and Zombies. Co-branding agreements in place with The Simpsons, Star Trek, and Justice League.	All (Europe)	Julien Barbier, Consumer Product Connection
Mutant Busters (TV series)	Animated adventure series based on action figure line. Set on a futuristic Earth divided in two parts, one inhabited by humans, the other by mutants bent on taking over.	All (Worldwide)	Diego Ibáñez Belaustegui, Planeta Junior (Spain)
Smurfs (The)	Classic Belgian comic-based brand about a fictional colony of small blue creatures. Third live-action film hits theaters in 2016.	All (U.K., Ireland)	Rob Wijeratna, Rocket Licensing
Teletubbies	Pre-school TV series featuring four alien toddlers with television screens implanted in their abdomens. Relaunched series aired in 2014.	All (ANZ)	Thomas Punch, Haven Licensing
Tree Fu Tom	Pre-school TV series featuring anthropomorphized arthropods in the miniature magical countryside Treetopolis. Second season screening in Italy.	All (Italy)	Maurizio Distefano, Maurizio Distefano/The Evolution of Licensing
Valiant Universe	Over 2,000 characters including Bloodshot, Shadowman, and Archer & Armstrong, with films currently in development.	Apparel, live events, online games, publishing, toys (China)	Dan Mintz, DMG Entertainment
Viacom properties	Partnership through 2019 includes Nickelodeon, Nick Jr., MTV, and Comedy Central.	All (ANZ)	Thomas Punch, Haven Licensing

International Licenses Recently Granted

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Aardman Animations	London Paramount Resort Co. Holdings	Theme park attractions (U.K.)	Aardman Animations
Angry Birds	Pedigree Books	Educational books (children's) (U.K.)	Rovio Entertainment
Barbie			Mattel
Cath Kidston	Kingston Bicycles/Direct365 Ltd.	Bicycle accessories (women's), bicycles (women's) (U.K.)	Cath Kidston Ltd.
Chappie	Treezero	Figures (Hong Kong)	Sony Pictures Consumer Products
Chupa Chups	Pantone Colorwear	Apparel (Europe)	Perfetti Van Melle
DC Comics	Character World/TDS Enterprises*	Home textiles (U.K.)	Warner Bros. Consumer Products (U.K. & Ireland)
	Corsair Toiletries*	Personal care products (U.K.)	
	Emporium Eyewear Ltd.	Eyewear (U.K.)	Warner Bros. Consumer Products (France)
	Swatch Group USA (The)	Watches (children's) (Worldwide)	

*Extension or renewal.

Continued on page 8

Licensing News *Continued from page 7*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Doodle Jump	AnimangaPLUS div. Skunkworks Intl.	Mobile comic apps (Worldwide)	Lima Sky
DreamWorks	Pedigree Books	Educational books (children's) (U.K.)	DreamWorks Animation
Entrepreneur	Professional Education Institute (PEI)	Coaching & training programs (Worldwide)	Entrepreneur Media
Farah	New Accessories Group Ltd.	Cold weather accessories (Europe)	Perry Ellis Intl. Europe Ltd./PEI Licensing
Flash Gordon	Bamford Watch Dept. Ltd.	Watches (U.K.)	Allsorts Licensing
Garfield	Mistiarn Pty Ltd. dba Mitch Dowd Design	Apparel (ANZ)	Global Licensing Ltd. (New Zealand)
	NTD Apparel	Apparel (Canada)	Bulldog Licensing
	Paletti Oy	Gift bags, gift wrap, greeting cards, postcards, stickers (Finland)	Paws, Inc.
	Paperone div. April Group	Notebooks (Philippines)	Medialink Pacific Ltd.
	Parvez Taj	Artwork (U.S., Canada, Germany, Italy, Spain, Switzerland, U.K.)	Paws, Inc.
	Pink Apple Pte Ltd.	Sports events (Malaysia, Singapore)	Medialink Pacific Ltd.
	Trade Call Investments Apparel Pty Ltd. (TCI Apparel)	Sleepwear (girls', women's) (South Africa)	Character Licensing & Marketing
Gerry Anderson	Hype Associates	Gift bags, gift wrap, greeting cards (U.K., Ireland)	ITV Studios Global Entertainment
	Plastic Head Music Distribution Ltd.	Accessories, apparel (adults'), mugs (U.K., Ireland)	
	Robert Harrop Designs	Collectible figures (U.K., Ireland)	
	Unstoppable Cards	Collectible cards (U.S., Canada, U.K., Ireland, ANZ, Japan, France, Germany, Italy, Spain)	
Gorjuss	Joumma Bags S.L.	Luggage (Spain)	Santoro Licensing
	La Fabbbrica delle Idee/Pon Pon Edizioni	Scrapbooking kits (Italy)	
	Mundi Unión SL	Umbrellas (Spain, Portugal, France, Italy, U.K.)	
	United Labels Ibérica S.A.	Board games (Spain, Portugal)	
Grand Slam	DreamKydS S.A.	Accessories (boys', men's), apparel (boys', men's) (Caribbean, Central America, South America)	Perry Ellis Intl./PEI Licensing
Horrid Henry	B.M. Fashion Ltd. t/a Fashion U.K.	Apparel (U.K.)	Caroline Mickler
Jonathan Adler	REM Eyewear	Eyewear (women's) (Worldwide)	Jonathan Adler Enterprises
Mentos	Pantone Colorwear	Apparel (Europe)	Perfetti Van Melle
Minions	Mask-arade Ltd.	Masks, standees (Europe)	Universal Studios Partnerships & Licensing
Monster High	H&M Hennes & Mauritz AB*	Apparel (Worldwide)	Mattel
Original Penguin	Lyn de Mexico S.A. De C.V.*	Handkerchiefs, loungewear (boy's, men's), pajamas, robes, shorts, sleepwear, t-shirts, underwear (Mexico)	Perry Ellis Intl./PEI Licensing
	New Accessories Group Ltd.	Belts (Europe)	Perry Ellis Intl. Europe Ltd./PEI Licensing
Paddington Bear	Pizza Express	Activity sheets (Worldwide)	StudioCanal
Paw Patrol	Amscan Intl.	Balloons, party goods (EMEA)	Nickelodeon & Viacom Consumer Products
Phantom (The)	Bamford Watch Dept. Ltd.	Watches (U.K.)	Allsorts Licensing
Playboy	Philipp Plein Intl. AG	Hoodies, jumpers, leather jackets, t-shirts (U.S., Asia & Europe (selected territories))	Playboy Enterprises
	Supreme*	Accessories (U.S., U.K., Japan)	Playboy Enterprises
Prince	Sports Authority	Performance apparel (U.S., Puerto Rico)	Authentic Brands Group
Rafaella	Sensual div. USA Apparel Group	Intimates, lingerie, loungewear, shapewear (women's), sleepwear (U.S., Canada)	Perry Ellis Intl./PEI Licensing
Robin Roderick	Evergreen Enterprises	Garden flags (U.S., Canada)	MHS Licensing + Consulting
Smiley World	Editis	Books, calendars, coloring & activity books, diaries (Worldwide)	SmileyWorld
Smurfs (The)	JAKKS Pacific*	Master toy (Worldwide)	Sony Pictures Consumer Products, Lafig Belgium/I.M.P.S. International Merchandising & Promotion Services
Stacey Yacula	Legacy Publishing	Greeting cards (Worldwide)	MHS Licensing + Consulting
Stephanie Ryan	Gregg Gift	Book covers, plates, totes (U.S., Canada)	
	Kay Dee Designs	Kitchen textiles (U.S., Canada)	
	Saturday Knight	Bath ensembles (North America, South America)	

*Extension or renewal.

Continued on page 9

Licensing News *Continued from page 8*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Studio Pets by Myrna	Pyramid Intl.	Canvas prints, posters, stationery (U.K.)	Lisle Intl. Licensing
	UK Greetings	Gift bags, gift wrap, greeting cards (U.K.)	
Swizzels brands	Scimitar Sports	Sportswear (U.K.)	Swizzels Matlow Ltd.
Terry Doughty	Canterbury Potteries	Ceramic mugs (U.S., Canada)	MHS Licensing + Consulting
	Design Works Crafts	Craft kits (Worldwide)	
WWE	ECW Press	Books (U.S., Canada)	World Wrestling Entertainment (WWE)
	Pedigree Books	Educational books (children's) (U.K.)	



contacts & connections

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

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adidas Group - Sports Licensed Div., Kathy Meyer, Senior Licensing Coordinator, 317-895-7000 x7171, kathy.meyer@reebok.com, P. 2.

Agency for the Performing Arts (APA), Brian Dow, Partner & Head Branding, Marketing, Licensing & Endorsements, 310-888-4200, bdow@apa-agency.com, P. 6.

Airlift Ideas, Shelley Rosen, President, 312-492-7772, P. 7.

All-American Licensing & Management Group (AALMG), Michael Gottsegen, Partner, 818-749-7236, michael@aalmg.com, P. 6.

American Greetings, Michael Brown, VP Licensing, 216-252-7300 x1346, michael.brown@amgreetings.com, P. 6.

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

Bakery Crafts/Jack Guttman, Nicci Henry, Licensing Manager, 513-881-4161, nhenry@bkrycft.com, P. 2.

Beanstalk, Sherikay Chaffee, AVP Brand Management, 212-303-1141, sherikay.chaffee@beanstalk.com, P. 6.

Blue Trellis, Bobbie Hunnicutt, Partner, 860-878-2794, bobbie@bluetrellis.com, P. 6.

Body Rags Clothing Co., Bill Moisan, President, 603-893-5069 x16, bmoisan@bodyrags.com, P. 6.

Bow Wow Pets div. European Home Designs, Jack Elbaz, President & CEO, 212-779-1140, info@bow-wowpet.com, P. 6.

Brand Central, Ross Misher, CEO, 310-268-1231, ross@brandcentralgroup.com, P. 6.

Brand Licensing Team, Cindy Birdsong, Managing Partner, 678-324-3270, cbirdsong@blteam.com, P. 6.

Brandberry, Ashley Mady, President, 561-499-0543, ashley@brandberry.com, P. 7.

Brandgenuity, Rachel Humiston, Managing Director, 212-925-0730, rachel@brandgenuity.com, P. 6.

Bulls I Toy, Mike Simon, Director Licensing & Product Development, 760-690-3902, mjsimon@bullsitoy.com, P. 2.

Canterbury Potteries, David Connell, President, 314-996-2670, david@canterburypotteries.com, P. 9.

Chobani, Grace Simmons Zuncic, SVP Corporate Development & Strategy, 607-847-6181, grace.simmons@chobani.com, P. 2.

Cinnabon, Kat Cole, President, 404-255-3250, kcole@focusbrands.com, P. 2.

ConAgra Foods, Chris Wilkins, President, 800-234-6079, chris.wilkins@conagrafoods.com, P. 2.

Costume Evolution, Shiken Ono, Principal, 310-324-2060, info@costumeevolution.com, P. 7.

Crunch Pak, Tony Freytag, SVP Marketing, 509-782-2807, tonyf@crunchpak.com, P. 2.

Design Works Crafts, Susan Knopp, Owner, 631-244-5749, suzicraft@aol.com, P. 9.

Disney Consumer Products, Paul Gitter, SVP Licensing Marvel, 818-544-1950, paul.gitter@disney.com, P. 6.

Disney Consumer Products, Josh Silverman, EVP Global Licensing, 818-544-0041, josh.silverman@disney.com, P. 2, 6.

Dr Pepper Snapple Group, Megan May, Licensing Manager, 972-673-7000, megan.may@dpsg.com, P. 2.

DreamWorks Animation, Michael Connolly, Head Global Consumer Products, 818-695-5000, michael.connolly@dreamworks.com, P. 8.

DWI Holdings, David Greenstein, CEO, 212-824-2680, dgreenstein@dwiholdings.com, P. 6.

E.J. Victor, John Jokinen, CEO, 828-437-1991, johnj@ejvictor.com, P. 6.

Entrepreneur Media, Ryan Shea, President & Corporate Publisher, 949-261-2325, rshea@entrepreneur.com, P. 8.

Euro Ceramica, Nicolas Marjeh, President, 973-394-9300, nicolasm@euroceramicainc.com, P. 6.

Evergreen Enterprises, Brittany Toler, SVP, 804-231-1800, btoler@gmail.com, P. 8.

Feld Entertainment, Mark Abernethy, VP Licensing & Business Development, 630-566-6219, mabernethy@feldinc.com, P. 6.

Fiesta Toy, Michael Lauber, President, 323-581-9988, michael@fiestatoy.com, P. 7.

Firefly Brand Management, Cynthia Modders, Owner, 415-513-5826, cynthiamodders@fireflybrandmanagement.com, P. 7.

Frost Productions, Cate Frost, Owner, 323-874-5300, info@aboutfrostproductions.com, P. 7.

Gelish/Hand & Nail Harmony, Danny Haile, CEO & Founder, 714-773-9758, danny@nailharmony.com, P. 6.

General Mills, Linc Davis, Director Trademark Licensing, 763-764-2631, linc.davis@gennmills.com, P. 6.

Goodyear Tires & Rubber Co., Nancy Ray, Director Licensed Products, 330-796-2121, nancy_ray@goodyear.com, P. 6.

Great Big Canvas, Gavin Jocius, GM, 877-722-6827, gjocius@greatbigcanvas.com, P. 6.

Gregg Gift, Jane Charette, GM, 949-753-4600, jcharette@gregggiftcompany.com, P. 8.

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IQ License, Kirsten Fallon, VP, 646-412-3304, kristen@iqlicense.com, P. 6.

IQ License, Dan Grabon, VP, 917-746-8075, dan.grabon@iqlicense.com, P. 7.

Jaipur Rugs, Asha Chaudhary, President & CEO, 404-351-2360, asha.chaudhary@jaipurrrugs.com, P. 6.

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Kate Spade & Co., Mary Renner Beech, SVP Licensing & CMO, 212-739-6550, mbeech@katespade.com, P. 6.

Kay Dee Designs, Rick Rakauskas, President, 401-539-2400, rrakauskas@kaydeedesigns.com, P. 8.

Kent Intl., Scott Kamler, President, 973-434-8181, skamler@kentbike.com, P. 6.

KIDdesigns, Isaac Ashkenazi, President, 732-574-9000 x206, iashenkazi@kiddesigns.com, P. 6.

Kin Community, Jennifer McDonnell, VP Partnerships, jennifer@kincommunity.com, P. 7.

Kravet, Beth Greene, EVP & Director Marketing/Strategic Branding, 516-293-2000, beth.greene@kravet.com, P. 6.

Lawless Entertainment, Sondra Contino, VP Sales & Marketing, 949-419-6156, sondra@lawlessent.com, P. 7.

Legacy Publishing, Timothy Cross, VP Operations, 978-368-8711, tcross@shoplegacy.com, P. 8.

Leveraged Marketing Corp. of America (LMCA), Hal Worsham, Managing Director Brand Licensing, 978-475-7616 x204, hworsham@lmca.net, P. 7.

Lima Sky, Eric Karp, Chief Licensing Officer, 914-486-1285, eric@limasky.com, P. 8.

Lionsgate, Tim Palen, CMO, 310-449-9200, tpalen@lionsgate.com, P. 6.

Lonely Planet, Drew Rowley, Global Director Consumer Products, 510-250-6400, consumerproducts@lonelyplanet.com, P. 6.

Lowe's, Tom Lamb, CMO, 336-658-4000, thomas.j.lamb@lowes.com, P. 6.

MAC Cosmetics, Karen Buglisi, Global Brand President, 212-965-6300, kbuglisi@maccosmetics.com, P. 6.

Majestic Athletic div. VF, Jim Pisani, President, 800-444-5574, jim_pisani@vfc.com, P. 2.

Majesty Brands, Jack Safdeye, CEO, 212-283-3400 x2100, jack@majesty-brands.com, P. 7.

Major League Baseball (MLB), Lisa Teitelbaum, Domestic Licensing, 212-931-7500, lisa.teitelbaum@mlb.com, P. 2.

Martha Stewart Living Omnimedia, Claudio Goldberg, SVP Publishing & Digital Media Operations, 212-827-8650, cgoldberg@marthastewart.com, P. 2.

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Mattel, Jessica Dunne, SVP & GM Consumer Products, 310-252-3837, jessica.dunne@mattel.com, P. 6, 7, 8.

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MHS Licensing + Consulting, Marty Segelbaum, President, 952-544-1377 x202, marty@mhslicensing.com, P. 8, 9.

Microsoft, John Friend, Head Content & Brand Business Development, 425-882-8080, john.friend@microsoft.com, P. 2.

Microsoft, Phil Spencer, Division Head Xbox, 425-882-8080, pspencer@microsoft.com, P. 6.

Mighty Fine, Patty Timsawat, President Licensing, 213-234-3921, patty@mightyfine.com, P. 7.

Nickelodeon & Viacom Consumer Products, Manuel Torres, SVP Global Toys & Publishing, 212-846-4735, manuel.torres@vimm.com, P. 7.

Nifty Home Products, Frank Tiemann, Founder, CEO & President, 507-243-3509, frank@niftyhp.com, P. 6.

Pantone Colorwear, Rhiannon Evans, Head Marketing & Projects, 377 93 10 42 42, info@pantonecolorwear.com, P. 7, 8.

Parham Santana, Aaron Spiegeland, VP Brand Strategy & Licensing, 212-645-7501 x54, aaron@parhamsantana.com, P. 6.

Parvez Taj, Parvez Taj, Owner, 800-981-6630, parvez@parveztaj.com, P. 8.

Paws, Inc., Jill Davis, SVP Licensing, 765-287-2222, jill@pawsinc.com, P. 8.

PepsiCo, Leslie Nagy, Senior Director Marketing Services & Licensing, 914-253-2000, leslie.nagy@pepsi.com, P. 2.

Perry Ellis Intl./PEI Licensing, Pamela Fields, VP Intl. Development & Licensing, 212-536-5602, pamela.fields@pery.com, P. 8.

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Playboy Enterprises, Matt Nordby, President Global Licensing, 310-424-1800, mnordby@playboy.com, P. 8.

Playrific, Beth Marcus, CEO, 978-663-0754, info@playrific.com, P. 6.

Professional Education Institute (PEI), Mike Hussey, President, 312-521-8002, mhussay@thepei.com, P. 8.

Rashti & Rashti div. HJ Rashti & Co., Charlotte Rashti, President, 212-594-3733, crashti@rashtiandrashti.com, P. 6.

REM Eyewear, Mike Hundert, CEO, 818-504-3950, mhundert@remeyewear.com, P. 8.

Rovio Entertainment, Naz Cuevas, EVP Global Licensing, 818-970-1030, naz.cuevas@rovio.com, P. 2,7.

Rubie's Costume, Lauren Rabinowitz, Director Licensing, 516-326-1500 x119, lauren@rubies.com, P. 2.

Sage Fruit, Steve Clement, General Manager, 509-494-1965, sclement@sagefruit.com, P. 2.

Samsung Electronics, Nick DiCarlo, VP & GM Immersive Products/Virtual Reality, 201-229-5000, n.dicarlo@samsung.com, P. 6.

Saturday Knight, Jim Lewis, President & COO, 513-641-1400, jlewis@skltd.com, P. 8.

Scientific Games, Steven Saferin, President Properties Group & CCO, 770-664-3852, steve.saferin@scientificgames.com, P. 6.

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Select Brands, Bill Enderes, President & CEO, 913-663-4500, william.enderes@selectbrands.com, P. 6.

Sensual div. USA Apparel Group, Izak Soud, President, 212-869-1450, izak@usaapparelgroup.com, P. 8.

Socksmith, Eric Gil, President, 831-426-6416, eric@socksmith.com, P. 7.

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

Sports Authority, Paul Okimoto, SVP & CMO, 303-200-5050, pokimoto@sportsauthority.com, P. 8.

Supreme, Angelo Baque, Brand Director, angelo@supremenewyork.com, P. 8.

Swatch Group USA (The), Frank Furlan, President & CEO, 201-271-1400, frank.furlan@swatchgroup.com, P. 7.

teNeues Publishing Group, Harald Thieck, Managing Director, 212-627-2414, hthieck@teneues-usa.com, P. 2.

Topix Media Lab Publishing, Bob Lee, Co-founder, 646-476-8860, bob@topixmedia.com, P. 7.

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Treezero, Kim Fung Wong, 852 2370 9693, 3zerocs@three-zero.com, P. 7.

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Universal Studios Partnerships & Licensing, Cindy Chang, SVP Consumer Products, 818-777-2067, cindy.chang@nbcuni.com, P. 8.

Universal Studios Partnerships & Licensing, Bill Kispert, EVP Worldwide Digital Platforms, 818-777-5446, bill.kispert@nbcuni.com, P. 6.

Unstoppable Cards, Barrie Roness, Director, barrie@unstoppablecards.com, P. 8.

Valiant Entertainment, Russell Brown, President Consumer Products, Promotions, & Ad Sales, 212-972-0361 x229, russb@valiantentertainment.com, P. 7.

Vandor, Stacey Dobkins, VP Licensing & Marketing, 801-972-2888 x149, sdobkins@vandorproducts.com, P. 7.

Viddiverse, Malcolm Bird, CEO, 213-840-0800, mgb@viddiverse.com, P. 6.

Wedding Paper Divas div. Shutterfly, Amber Harrison, Style & Trend Expert, 650-610-5200, partners@weddingpaperdivas.com, P. 6.

Wilton Enterprises, Eric Erwin, EVP & CMO, 630-810-2540, eerwin@wilton.com, P. 7.

Wm. Wrigley Jr., Casey Keller, President North America, 312-212-7400, casey.keller@wrigley.com, P. 2.

World Tech Toys, Ben Ibarra, VP, 818-675-9001 x100, ben@worldtechttoys.com, P. 2.

World Wrestling Entertainment (WWE), Jess Richardson, VP Licensing North America, 203-328-2539, jess.richardson@wwecorp.com, P. 7,9.

Zynga, Lloyd Melnick, Senior Director Social Casino, 855-449-9642, lmelnick@zynga.com, P. 7.

Zynga, Adam Sussman, SVP Global Publishing, 855-449-9642, asussman@zynga.com, P. 6.



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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Amscan Intl., Sandra Vanstan, Director Licensing EMEA, 44 1908 288 500, svanstan@amscan.com, P. 8.

AnimangaPLUS div. Skunkworks Intl., Melch Valimento, Head Studio Operations & Founder, info@animangaplus.com, P. 8.

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DMG Entertainment, Dan Mintz, CEO, 86 10 8565 3333, dan.mintz@dmgmedia.com, P. 7.

DreamKys S.A., Severo Sousa, CEO, 507 265 0000, gerencia@dreamkys.com, P. 8.

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Global Licensing Ltd. (New Zealand), Mark Paul, Director, 64 9 845 4900, mark@global-nz.com, P. 8.

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Online & Value Channels

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Brick-and-Mortar Channel Sales

After e-commerce, the most dramatic share change came in the department store/mid-tier segment, which fell from 13.0% in 2013 to 12.6% in 2013.

That share lost by department stores was largely picked up by the lowest-priced retail tier, consisting of dollar/value/outlet stores. This channel saw its share of market grow 0.3% in 2014, mirroring its performance of 2013. The channel rose from 8.5% to 8.8% of all retail sales of licensed products in the U.S. and Canada. That translates to a 3.5% relative increase in share.

Entertainment properties in particular are expanding into the dollar channel, as licensors expand their licensee pools. "We do sell there," says one licensor of an entertainment brand. "But we can do more. You have to have the right price point for that consumer."

"You have to have different types of licensees in place to open up this market," agrees another licensor, who has signed new licensees for low-priced toys distributed exclusively in the dollar channel.

Mass, Grocery/Drug Edge Up

Mass/discount chains also saw their share edge up, from 31.8% to 31.9%. While that translates to relative growth of only 0.3%, it is significant in dollar terms since this channel has by far the largest share of market of any distribution tier. "Mass accounts continue to dominate licensed merchandise," notes one respondent. "Specialty stores cannot bring the volume even when you lump them all together."

Nevertheless, shrinking shelf space at mass merchants remains an ongoing issue for licensed products. Target, Walmart and Best Buy continue to reduce space for licensed goods in store, while promising a corresponding increase in licensed merchandise offered through their e-commerce sites, according to one licensor.

Grocery and drug stores continued to rise, creeping up from 12.2% to 12.3% in 2014. One respondent described a strategic move to diversify product assortments as making grocery and drug an increasingly important channel for licensed goods.

"Grocery continues to expand their product assortment evolution to be a one stop shop for consumers," says this licensing agent. "Drug chains such as Walgreens and Rite Aid have redone several stores to include fresh food and increase their product assortment to keep pace with competition from mass retailers in urban areas such as City Target."

Also feeding the grocery channel is a healthy increase in sales of licensed food and beverage products. The category grew 6.0% in 2014, according to the TLL Survey, thanks, in part, to increased licensing of non-food brands for food products and improvements in frozen food technology.

Specialty stores' share remained flat at 19.3%, amid conflicting opinions from survey respondents. This is likely

REPRESENTATIVE RETAIL STORES BY DISTRIBUTION CHANNEL

Mass/Discount/Club/Big Box: BJ's, Costco, Kmart, Sam's, Target, Toys R Us, Walmart

Specialty Stores: Ace Hardware, Barnes & Noble, Bass Pro, Bed Bath & Beyond, Best Buy, Cabela's, Cracker Barrel, Dick's, Forever 21, GameStop, H&M, Home Depot, Limited, Lowe's, Michaels, Modell's, museum stores, PetSmart, Sherwin-Williams, Sports Authority, Staples, Zara

Department Stores & Mid-Tier: Bloomingdale's, Dillard's, JCPenney, Kohl's, Macy's, Neiman-Marcus, Sears

Grocery and Drug: Ahold, Aldi, CVS Caremark, Giant Eagle, Kroger, Meijer, Publix, RiteAid, Safeway, ShopRite, Walgreen

Dollar/Value/Off-Price: Amazing Savings, Big Lots, Dollar General, Family Dollar, Ross Stores, Save Mart, Supervalu, TJ Maxx

Online/E-Commerce: Amazon, Café Press, Gilt, Zappos, Zazzle

Variety and Convenience: 7-Eleven, Circle-K

TV Shopping: HSN, QVC, ShopHQ

Mail Order: Oriental Trading, Signals

Other: Kiosks, on-site, vending, more

driven by the wide variety of retailers in the specialty sector. While respondents noted an increase in licensed merchandise carried by fast-fashion chains such as Forever 21 and H&M, and sporting goods stores, other specialists like book stores, stationers and gift and novelty purveyors have contracted in recent years.

Amazon's dominance in e-commerce cuts two ways, similar to the way Walmart is dominant in U.S. brick-and-mortar retailing, and the way "Frozen" dominated entertainment licensing in 2014. All of these brands expand the retail business; but at the same time, they make it tough for smaller competitors and new products.

One licensee described creating variations of products specifically for Amazon as a way to minimize "showrooming." With slightly different products on Amazon, it is more difficult for consumers to make a direct price comparison with the products they are browsing in stores.

A licensing agent who reported his brands' e-commerce business was down in 2014 pointed to the failure of some brands to move swiftly enough to optimize their own sites for mobile purchasing.

According to the 2015 Shop.org/Forrester Research Inc. State of Online Retailing Report, the development of mobile sales is a top priority for retailers in 2015, with 58% of surveyed retailers putting it at the top of their marketing priority list (up from 53% a year earlier).

The survey also found that smartphone sales as a percentage of online sales grew from 8% in 2013 to 12% in 2014, an increase of 50%. Sales via tablets also grew from 13% of online sales in 2013 to 16% in 2014.

Even as e-commerce continued to grow over the year, both mail order and TV shopping saw their shares decline significantly. Mail order's decline of 33.3%, from a .3% to 0.2% share, follows a multi-year pattern as e-commerce has

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Who's News

Ron Garfield is leaving Sony Pictures Television to become the Executive Vice President and General Manager of FremantleMedia North America's new Buzzr TV digital network, which is scheduled to launch in 17 markets this summer.

Anna Kislevitz is appointed Senior Manager Licensing & Merchandising for 41 Entertainment where she will work with key brands like Classic PAC-Man plus Kong-King of the Apes.

American Greetings Properties announces a number of executive moves in the wake of its recent sale of Strawberry Shortcake to Iconix and refocusing on Care Bears, including the hiring of **Karen Vermeulen** as Head of Global Sales and Co-Productions, and the promotions of **Janice Ross** from VP of Marketing to Head of Global Licensing, **Megan Buettner** from VP Creative to Head of Creative Studio New Media, **Angelina Castro** from Director of Public Relations to Head of Marketing.

Focusing on the other side of the Strawberry Shortcake deal, Iconix Brand Group appoints **Cathy Hoffman Glosser**, Senior Vice President of Licensing and Retail Business for Iconix's entertainment division with responsibility for leading development of the newly acquired Strawberry Shortcake brand.

Jacqueline Hofman is hired by Nordic Licensing Company to manage the company's newly acquired Warner Bros. Consumer Products EMEA account in the Benelux territories. NLC has represented WBCP in the Nordic regions since 2005.

Liz Brown takes over the newly created position of Licensing Associate, EMEA, for Amscan International where she will support the licensing team across multiple sectors.

Online & Value Channels

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largely replaced shopping by mail, and virtually all players would be considered "multichannel" today.

The decline in TV shopping was smaller, with the channel's share dropping from 1.4% to 1.3%, a 7.1% decline. While there is an abundance of licensing activity on QVC and HSN, these outlets are also increasingly driven by e-commerce.

The variety/convenience channel also lost a fraction of a share point, falling from 3.0% to 2.9%.

**RETAIL SALES OF LICENSED MERCHANDISE,
BY DISTRIBUTION CHANNEL, 2014**

PRODUCT CATEGORY	SHARE OF MARKET, 2014	SHARE OF MARKET, 2013	% GROWTH IN SHARE 2013-2014
Discount/Mass	31.9%	31.8%	0.3%
Online/E-commerce	10.0%	8.5%	17.6%
TV Shopping	1.3%	1.4%	-7.1%
Mail Order	0.2%	0.3%	-33.3%
Specialty Stores	19.3%	19.3%	0.0%
Department Stores/Mid-tier	12.6%	13.0%	-3.1%
Grocery and Drug	12.3%	12.2%	0.8%
Variety and Convenience	2.9%	3.0%	-3.3%
Dollar/Value/Off-Price	8.8%	8.5%	3.5%
Other	0.7%	2.0%	NA

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