

# TLL THE LICENSING LETTER

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## Global Retail Sales of Licensed Goods Rise 2%, Reach \$158.8 Billion in 2014

Worldwide retail sales of licensed merchandise increased 2% to \$158.8 billion in 2014, as compared to \$155.8 billion in 2013, according to *The Licensing Letter's Annual Licensing Business Survey*. The increase was fuelled by strong sales in the U.S., U.K. and Asia, which offset the stagnation or decline in other big markets in and outside Europe.

### Results by Territory

#### U.S./Canada

Licensed sales in the U.S./Canada were \$99.8 billion in 2014, up 2.5% from \$97.4 billion in 2013. But the impressive continental totals belie what actually happened in North America.

In the U.S., a recovering economy and lower oil prices helped sales rise 2.65% to just below \$90.3 billion. It was such a good year that the U.S.'s global market share jumped 0.4% to 57%.

But in Canada, licensed sales grew a lackluster 0.75%. The same low oil prices that boosted consumer spending in the U.S. hurt it in Canada by forcing layoffs in the key oil and gas sector. And because of high fuel taxes, Canadian consumers didn't get relief at the pump. Cheap oil also weakened the Canadian dollar and made licensed goods from the U.S. more expensive. Retail suffered. Stores closed, with casualties including Smart Set, Jacob, Sears, and Target which pulled out of Canada entirely at year's end. Things hit rock bottom in December when instead of spiking for the holidays retail spending fell 2%—the biggest monthly drop in 5 years.

#### Western Europe

At \$31.3 billion, Western Europe licensed sales grew by only \$20 million (0.1%). But after three straight years of decline, flat is the new up for Western Europe. Performance varies by country. The U.K., the territory's biggest market for licensed goods (and number 4 in the world), grew a robust 3.0%. "Inflation is low,

confidence has improved and the big retailers are relatively healthy," explains one U.K. licensor. Many U.K. Survey respondents attributed growth to Disney and the Frozen factor.

*Continued on page 3*

### PRESCHOOL PROPERTIES

## Peppa Pig Joins the \$1 Billion Club

Preschool property Peppa Pig has become a \$1 billion property. There was no official announcement. Officials of Entertainment One Ltd., which has licensed Peppa to more than 600 licensees worldwide, recently mentioned Peppa's having sales above \$1 billion in discussing the company's earnings for the fiscal year ended March 31. Even if it was not delivered with fanfare, the news puts Peppa in an elite club of entertainment/character properties, most of them owned by the much larger Walt Disney Co.

### The \$1 Billion Club

The most recent version of *The Licensing Letter's* annual "\$100 Million Properties" issue (Nov. 3, 2014) lists 10 entertainment/character properties with over \$1 billion in global licensed retail sales based on 2013 data (see the chart on page 11), led by Mickey & Friends and including seven Disney-owned properties.

Properties that we expect to be adding to the list this year (based on information already disclosed by their respective licensors) include Teenage Mutant Ninja Turtles, Frozen and Marvel Avengers. Among the listed preschool properties, Disney's Winnie the Pooh was the only brand with over \$1 billion in global sales. It rang up \$2.8 billion in global retail sales in 2013. The next biggest listed preschool properties were Thomas the Tank Engine (HIT, \$926 million), Sesame Street (Sesame Workshop, \$923 million) and Dora the Explorer (Viacom, \$800 million).

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# ➔ Licensing Ledger

## TWO BUY FREDRIC FEKKAI

Fragrance and beauty marketers **SA Designer Parfums** and **Luxe Brands** are teaming to acquire the **Fredrick Fekkai** luxury haircare brand and seven salons from **Procter & Gamble**. The acquisition is part of the companies' plan to expand their portfolios through brand ownership and licensing to cover all major markets. Together they will launch an **Ariana Grande** fragrance throughout North America and Europe in September. Fekkai, perhaps best known for styling Hillary Clinton, remains advisor and brand architect at the flagship salon on 5th Avenue in New York.

## GARFIELD GETS GLOBAL PUSH

Fat cat **Garfield** will grow a bit more this year with new direct-to-retail deals in Europe and Asia, a new licensing agent in Japan and stepped up activity in the U.S. Licensor **Paws, Inc.**, is taking **Garfield** direct-to-retail with new programs with **Original Marines** in Italy, **Undiz** in France, and **C&A** and **Rei do Mate** in Brazil. In Japan, **Tohokushinsha Film Corp.** is its new agent. U.S. activity includes a new musical stage play, merchandise tied to the 30th anniversary of TV special **Garfield's Halloween Adventure** and a campaign with school fundraiser **Great American Opportunities**. **Garfield** creator **Jim Davis** identified Latin America, China, India, Japan and the U.S. all as key areas of growth. **Garfield** enjoys licensing and newspaper syndication in 111 countries, TV in 211 territories, and 17 million fans on Facebook.

## LARGER FASHION LINES A PLUS FOR RETAILERS

Demand for plus-size women's clothing is expected to increase strongly through 2019, according to researcher **Ibis World**, due to factors including rising per capita disposable income, a decline in healthy eating, greater designer collaboration and greater availability of premium products. The trend is showing up in licensing: ▶ In November, plus-size fashion retailer **Torrid** will release a holiday capsule collection **Rebel for Torrid**, created with actress **Rebel Wilson**, who is best known for her role as **Fat**

**Amy** in the **Pitch Perfect** movies. The collection comprises about 25 pieces, including tops, bottoms, dresses, jackets and accessories with personal ties to **Wilson**. A koala print T-shirt, for instance, reflects her Australian background and microphone-shaped charms reference her career as a performer. A spring 2016 collection is also in the works.

- ▶ Model **Ashley Graham**, who made headlines in February as the first plus-sized model to appear in **Sports Illustrated's** annual swimsuit edition, will launch a U.S. lingerie line with **Nordstrom** in August. The bondage-inspired pieces include bras, underwear, chemises and kimonos, specifically meant for plus-sized women. **Graham** has been partnered with Canadian plus-size retailer **Addition Elle** on the **Ashley Graham Collection** lingerie line since 2013. Her future plans include launching a sportswear collection for plus-sized women.

## JILLIAN MICHAELS GETS A LICENSING AGENT

Trainer and life coach **Jillian Michaels**, from NBC's **The Biggest Loser**, signed with **Shark Branding** to license her brand for categories including swimwear, eyewear, fragrance, cosmetics, skincare, hair care, food appliances, and household cleaning products in North America. **Shark Branding** will work with **Michaels's** company,

**Empowered Media**, to ramp up licensing activity in North America and internationally.

## MADONNA TAKES HARD CANDY GLOBAL

Speaking of fitness-inspired licensing deals, **Madonna** will expand her **Hard Candy Fitness** brand with help from **Epic Rights**, just signed for global merchandising and branding programs. **Hard Candy Fitness** operates luxury fitness clubs in Moscow, Sydney, Mexico City, Rome, Berlin, Toronto and other big cities around the world.

## KLUM SPREADS COLOR FROM DOWN UNDER

**Heidi Klum** is ready to import her colorful line of men's underwear, **HK Man**, to the U.S., she told **WWD** in a recent interview. **HK Man** was launched in Australia and New Zealand and is currently available in the U.S. online via [www.heidiklumintimates.com](http://www.heidiklumintimates.com). The site also teases a pending expansion of **Klum's** lingerie brands to Europe. **Bendon** manufactures **HK Man**, as well as **Heidi Klum Intimates** and **Heidi by Heidi Klum**, a **Macy's** retail exclusive.

## F.Y.E. EXPANDS LICENSED MERCH

Entertainment licensed merchandise is playing a significant role in the turnaround of retailer **Trans World Entertainment Corp.**, which operates 310 entertainment stores primarily under the **f.y.e.** and **Suncoast** brands. The company reported that comparable store sales of "trend" merchandise rose 26.5% in its fiscal first quarter, ended May 2, with an ongoing shift in its inventory mix to emphasize "the growing categories of entertainment and pop culture merchandise," such as exclusive **Marvel** T-shirts. Trend merchandise now accounts for 15% of the retailer's sales, up from 11% a year earlier. Entertainment merchants including **TWEC** and **Hastings Entertainment** are growing outlets for licensed merchandise, as they seek to offset declining sales of DVDs and CDs.



### Editor-in-Chief

Glenn Demby  
glensdemby@gmail.com

### Managing Editor

Barbara Manning Grimm  
barb@plainlanguagemedia.com

### Contributing Editor

Karina Masolova  
karina@plainlanguagemedia.com

### Contributing Editor

Marcy Magiera  
marcy@plainlanguagemedia.com

### Business Development

Randy Cochran  
randy@plainlanguagemedia.com

### Marketing Director

Michael Sherman  
michaels@plainlanguagemedia.com

### Customer Service

customerservice@  
plainlanguagemedia.com

### General Manager

Jim Pearmain

### CEO

Mark Ziebarth

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Plain Language Media, LLC, 15 Shaw Street, New London, CT, 06320; Phone: 888-729-2315; Fax: 855-649-1623

## Global Retail Sales

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“Frozen dominated and became a category unto itself,” according to one.

Other Western European countries making gains in 2014 include Germany (2.8%), where entertainment, corporate goods and electronics had strong years, and, surprisingly, Spain where a surge in holiday spending helped turn 2013’s 4.2% decline into a 2014 gain of 1.0%. A 1.5% increase of sales in the Netherlands lifted the Benelux countries to 1.0% growth for the year; Scandinavia was up 1.0%, thanks to 1.5% growth in Sweden.

But most Western European countries were either flat or down. The financially strapped Mediterranean states continued to struggle, including the major licensing markets of France (-2.9%) and Italy (-2.75%), as well as Portugal (0.1%) and, of course, Greece (-15.5%). Once a bright spot, Turkey went from 5.1% growth in 2013 to 1.5% decline in 2014. High interest rates and new bans on credit card spending hurt sales. Things got so bad for retail in Turkey that home-grown electronics retail giant Vatan Bilgisayar scrapped plans to open dozens of new stores in 2014.

### Asia

At \$19.4 billion, Asia’s licensed goods market grew 3.1% in 2014, 50% above the global average and second highest of any territory (trailing only the Middle East and Africa at 4.4%). Asia now accounts for 12.2% of global sales. But while most countries and regions in Asia were up, the narrative differed across locations.

One of the biggest stories is the continued recovery of Japan, Asia’s biggest market and the world’s second largest consumer of licensed goods. After years of decline, Japan posted a 0.2% increase in 2013. In 2014, Japan kept growing and at a 150% higher rate, i.e., 0.5%. A Tokyo-based licensing agent attributes the turnaround to “Abenomics,” or government policies to improve consumer confidence and promote spending.

For all the recent talk about economic slowdown, licensed goods sales in mainland China increased at the second highest rate of any country (behind only tiny Macau at 9.0%). But there were red flags. 2014’s 8.0% growth rate was less than 2013’s 9.2% rate. Government “anti-corruption” policies slowed luxury goods sales. Chinese people saved more of their household income and, according to one respondent, directed more of what they did spend on licensed goods for local brands reflecting their own culture and heritage. Walmart closed 14 stores in China during the year. Tesco, Lotus and Metro Group also closed stores and/or called off expansion plans. Other western companies like Hermès, Ralph Lauren and Lalique are adapting by establishing local operations to create products for local tastes.

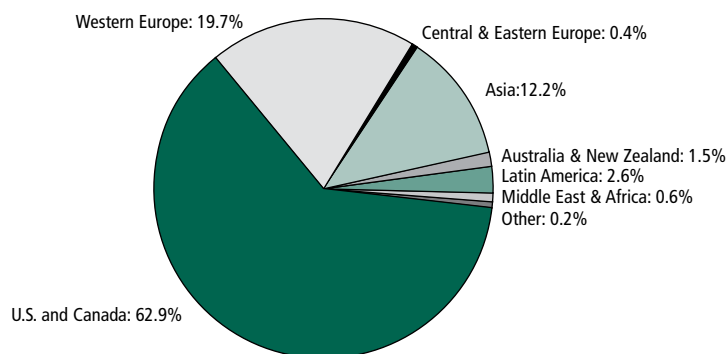
### RETAIL SALES OF LICENSED MERCHANDISE, WORLDWIDE, BY TERRITORY, 2013-2014 (IN MILLIONS OF U.S. DOLLARS)

TERRITORY	RETAIL SALES, 2014	RETAIL SALES, 2013	% CHANGE, 2013-2014	MARKET SHARE, 2014
U.S. and Canada	\$99,873	\$97,471	2.5%	62.9%
Western Europe	\$31,270	\$31,250	0.1%	19.7%
Central and Eastern Europe	\$598	\$632	-5.3%	0.4%
Asia	\$19,412	\$18,820	3.1%	12.2%
Australia and New Zealand	\$2,323	\$2,278	2.0%	1.5%
Latin America	\$4,120	\$4,122	0.0%	2.6%
Middle East and Africa	\$899	\$861	4.4%	0.6%
Other	\$393	\$398	-1.3%	0.2%
<b>TOTAL</b>	<b>\$158,888</b>	<b>\$155,832</b>	<b>2.0%</b>	<b>100.0%</b>

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

### GLOBAL RETAIL SALES OF LICENSED MERCHANDISE, BY TERRITORY, 2014

Total: \$158.8 Billion



SOURCE: THE LICENSING LETTER

Other Asian countries posting significant growth in 2014:

- ▶ India reached \$678 million in licensed sales but inflation, high interest rates and the weak rupee cut the rate of growth from 8.3% in 2013 to 6.5%;
- ▶ South Korea, Asia’s fourth biggest economy, grew 2.75% (as opposed to 3.1% in 2013);
- ▶ Taiwan and Hong Kong sales grew, respectively, 3.0% and 3.5%; and
- ▶ Most Southeast Asian countries were up, including the Philippines (4.5%), Indonesia (3.0%), Malaysia (2.75%) and Singapore (1.0%).

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### Central and Eastern Europe

Central and Eastern Europe was the only territory to record a decline in licensed sales, from \$632 to \$598 million in 2014 (-5.3%). Blame it on Russia where licensed sales fell a dizzying 10% after increasing 6.1% in 2013. Although long-term prospects for licensing in Russia remain bright, this year it all went wrong. War in Ukraine led to U.S. and EU sanctions. The ruble collapsed, taking the Russian retail market with it—although, in an ironic way, the ruble’s fall may have prevented an even bigger meltdown. As one licensing agent on the scene explains: “Russian consumers went on a binge at the end of the year not so much because they wanted licensed goods but in an effort to dump their rubles.”

Reverberations from Russia and bad economies and/or government policies hurt other countries in the territory, including Hungary (-2.0%), the Czech Republic (-2.0%) and, of course, Ukraine. The lone bright spot: Poland posted a 4.0% gain thanks to strong sales of licensed apparel, footwear, sporting goods and electronics.

### Other Territories

The Middle East and Africa grew 4.4%, most of any territory (albeit on the smallest base). The territory’s biggest market, South Africa, posted 5.0% growth thanks to strong sales of entertainment properties, footwear and toys. But according to one local licensing agent: “the decline of the rand vis-à-vis the dollar wiped out the increases in royalties generated.” Other Sub-Sahara countries like Nigeria, Kenya and Botswana did well (although their economies are too small to make much of an impact on the totals). Lower oil prices did little to slow consumption of licensed goods in the Gulf states of Saudi Arabia (3.0%), UAE (3.0%) and Qatar (2.75%).

As in 2013, sales of licensed goods in Australia and New Zealand increased 2.0% in 2014 to \$2.3 billion. Although the economies of both states remain fundamentally sound, challenges remain including the growth of piracy and the gray market. “Patchwork state intellectual property regulation is a major problem in Australia,” according to one licensing agency.

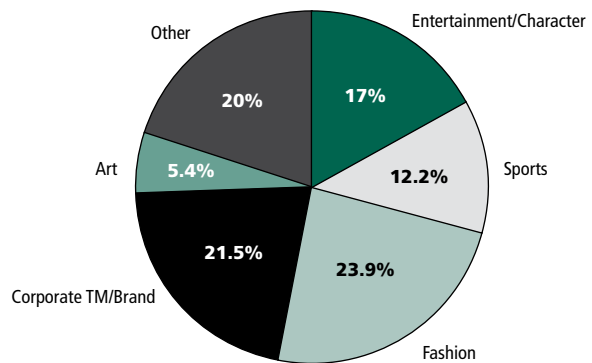
Latin America, where just about all licensed revenues come from sales of entertainment and celebrities-based properties, was flat in 2014. After growing 3.9% in 2013, Brazil declined 1.50%. The expected bump from the 2014 World Cup didn’t happen. “Brazil’s political situation and economy are going in the wrong direction,” one regional licensing agent explains. Mexico’s 4.1% inflation rate essentially cancelled out its 2.25% increase in sales. Bright spots in Latin America included Chile with 3.0% growth and \$191 million in sales and tiny (in terms of licensing revenues) but emerging countries like Colombia, Ecuador and Costa Rica.

RETAIL SALES OF LICENSED MERCHANDISE, WORLDWIDE, BY PROPERTY TYPE, 2013-2014 (IN MILLIONS OF U.S. DOLLARS)					
	RETAIL SALES, 2014	RETAIL SALES, 2013	% CHANGE, 2013-2014	MARKET SHARE, 2013	MARKET SHARE, 2014
Entertainment/Character	\$27,011	\$25,768	4.8%	16.5%	17.0%
Sports	\$19,384	\$18,755	3.4%	12.0%	12.2%
Fashion	\$37,974	\$37,101	2.4%	23.8%	23.9%
Corporate TM/Brand	\$34,161	\$33,752	1.2%	21.7%	21.5%
Art	\$8,580	\$9,231	-7.1%	5.9%	5.4%
Other	\$31,778	\$31,225	1.8%	20.0%	20.0%
<b>TOTAL</b>	<b>\$158,888</b>	<b>\$155,832</b>	<b>2.0%</b>	<b>100.0%</b>	<b>100.0%</b>

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

### GLOBAL RETAIL SALES OF LICENSED MERCHANDISE, PROPERTY TYPE, 2014

Total: \$158.8 Billion



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

### Property Trends

Entertainment/character increased 4.8% in 2014, highest of any property type. With worldwide sales of \$27.0 billion, entertainment now accounts for 17.0% of the licensing market (as opposed to 16.5% in 2013). It’s the same story all over the world: dominance of Disney and other “A” properties—Frozen, Teenage Mutant Ninja Turtles, Spider-Man, Avengers, Minions, et al. But there are local variations. Thus, for example, Hello Kitty, Angry Birds and other brands that got hammered in the U.S. and U.K. did well in other regions, especially less developed markets like Africa and Latin America. Meanwhile, non-U.S. entertainment properties like Peppa Pig and Purple Turtle continue to emerge to challenge Disney.

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Sports had the second highest growth rate at 3.4%, generating just under \$19.4 billion in sales and 12.2% in market share. Factors for growth include the continued popularity of pro sports in North America and expanded soccer team licensing—both national and club-based—around the world. The worlds are converging. Thus, for example, 35% of NBA licensed revenues now come from markets outside the U.S.; meanwhile, sales of English Premiere League and other foreign soccer goods continue to grow in North America.

Fashion is still the biggest segment accounting for 23.9% of all worldwide licensed sales. Despite competition and shrinking retail space, fashion grew 2.4% in 2014 to \$37.9 billion. Meanwhile, corporate/trademark properties, the second biggest property type, was flat at \$34.1 billion (1.2%). On the downside, art continues to decline, falling 7.1% to \$8.5 billion.

**Product Trends**

Key results in terms of licensed sales by product category:

- ▶ Toys/interactive games grew 3.1%, second most of any product type, with all of the growth coming from traditional toys; sales of electronic games were actually down in 2014;
- ▶ At 3.7%, the “Other” category actually grew the fastest fueled by sporting goods, electronics and electronics accessories;
- ▶ Apparel/accessories/footwear, by far the biggest category with 40% market share, recorded 2.6% growth thanks to strong sales in footwear, watches, fine jewelry and men’s fashion;
- ▶ Food/beverage posted the third highest growth rate at 2.7% and was up in almost all territories;

- ▶ Three product categories were down in 2014, including gifts/novelties (-4.7%), stationery/paper (-3.1%) and HBA (-1.7%).

RETAIL SALES OF LICENSED MERCHANDISE, WORLDWIDE, BY PRODUCT CATEGORY, 2013-2014 (IN MILLIONS OF U.S. DOLLARS)					
	RETAIL SALES, 2014	RETAIL SALES, 2013	% CHANGE, 2013-2014	MARKET SHARE, 2013	MARKET SHARE, 2014
Apparel/Accessories/Footwear	\$63,555	\$61,955	2.6%	39.8%	40.0%
Toys/Interactive Games	\$17,160	\$16,649	3.1%	10.7%	10.8%
Home Furnishings/Housewares/Domestics	\$12,076	\$11,928	1.2%	7.7%	7.6%
HBA	\$11,122	\$11,319	-1.7%	7.3%	7.0%
Food/Beverage	\$11,599	\$11,290	2.7%	7.2%	7.3%
Publishing	\$8,421	\$8,242	2.2%	5.3%	5.3%
Stationery/Paper	\$5,243	\$5,409	-3.1%	3.5%	3.3%
Gifts/Novelties	\$4,608	\$4,837	-4.7%	3.1%	2.9%
Other	\$25,104	\$24,203	3.7%	15.5%	15.8%
<b>TOTAL</b>	<b>\$158,888</b>	<b>\$155,832</b>	<b>2.0%</b>	<b>100.0%</b>	<b>100.0%</b>

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SOURCE: THE LICENSING LETTER

## Grow Your Share of the \$155.8B Worldwide Licensing Business



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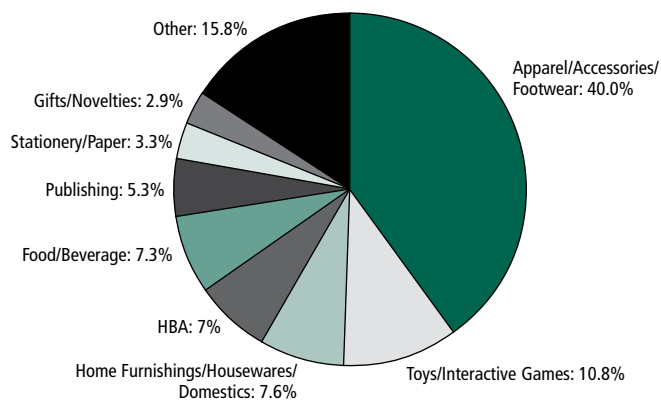
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**GLOBAL RETAIL SALES OF LICENSED MERCHANDISE, BY PRODUCT CATEGORY, 2014**

Total: \$158.8 Billion



SOURCE: THE LICENSING LETTER

# Licensing News

## Properties Available Or Recently Assigned, U.S.

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
Angry Birds	Mobile game app-based property featuring birds who enact revenge against pigs. First feature-length film hit theaters May 2016.	Beverages, food	Ross Misher, Brand Central
Are You Smarter Than a 5th Grader?	Quiz show which challenges adults to test their grammar school knowledge. New season airing this month.	Educational products, games, publishing, toys	Ross Misher, Brand Central
Hollywood Reporter (The)	Entertainment industry media brand whose flagship tabloid has circulation of over 70,000 readers and millions of monthly hits online.	All	Francisco Arenas, Guggenheim Media
Three Stooges (movie)	Action comedy film returning to the big screen with original 2012 cast reprising their roles.	All	Ani Khachorian, C3 Entertainment

## Licenses Recently Granted, U.S.

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
30 Days of Night	Fright Rags	Baseball tees, hooded sweatshirts, t-shirts	Idea Patch
American Kennel Club	Big Lots	Dog accessories, dog grooming products, dog toys, dog treats	American Kennel Club
Billy Idol	American Classics	Onesies, sweatshirts, t-shirts	Epic Rights
Bloom County	Acco Brands	Calendars	Idea Patch
Brisk	Mishka	Backpacks, baseball caps, jerseys, t-shirts	PepsiCo
CaptainSparklez	Jazwares	Action figures, plush	Maker Studios
Car and Driver	Argento SC by Sicura Inc.*	Car accessories, pet travel accessories	Joester Loria Group
Darth Vader	Ugg Since 1974	Boots	Disney Consumer Products
David Tutera	Fuzion Creations	Jewelry	Brand Liaison (The)
Deadliest Catch	HyperPower Game Group, Tapinator	Mobile game apps	Discovery Consumer Products
Def Leppard	American Classics	Onesies, sweatshirts, t-shirts	Epic Rights
Disney Princess	Delta Children's Products*	Beds (children's), cribs	Disney Consumer Products
ExplodingTNT	Jazwares	Action figures, plush	ExplodingTNT
From the Studio of Sandra Magsamen	Divatex Home Fashions	Body pillows	Mixed Media Group
Fruit Ninja	Halfbrick	Mobile game apps	Exim Licensing
Goodyear	SCL Footwear Group	Footwear (men's)	IMG Worldwide
H by Halston	QVC	Accessories, caftans, dresses, footwear, jumpsuits, knits	Xcel Brands
Journey	American Classics	Onesies, sweatshirts, t-shirts	Epic Rights
Juicy Couture	RAJ Manufacturing	Master swimwear (women's)	Authentic Brands Group
Jurassic World	Sambro Intl.	Stationery	Universal Studios Partnerships & Licensing
Kevlar	Reebok Intl.	Sporting equipment, sports accessories, sportswear	DuPont
Le Cordon Bleu	SodaStream Intl.	Carbonation systems (5 years)	Le Cordon Bleu
Little Charmers	Accessory Innovations	Backpacks, bags	Corus Entertainment/Nelvana Enterprises
	Bentex Group	Master apparel	
	Fantasia Accessories	Hair accessories, headwear, jewelry, rainwear	
	Franco Manufacturing	Bath, bedding (children's)	
	SG Footwear div. SG Companies	Footwear	
	SGI Apparel div. SG Companies	Sleepwear	
Martha Stewart	Mondelez Intl.	Crackers	Martha Stewart Living Omnimedia
Marvel Ant-Man	FunKo	Figures	Disney Consumer Products
Mr. Bubble	Alchemy 3	Lottery tickets	Firefly Brand Management
	Creative Apparel Concepts	Loungewear, sleepwear	
	Drizzle Art	Art prints, paintings	
	Mad Engine	Loungewear, sleepwear, tops (juniors')	
	Original Retro Brand	Hats, t-shirts	
National Geographic	TOMS	Backpacks, footwear, sunglasses	National Geographic Society

\*Extension or renewal.

Continued on page 7

## Licensing News *Continued from page 6*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
NFL Players Association	Freaker USA	Insulated beverage holders	NFL Players, Brandr Group (The)
	Identity Games	Electronic games	
	Zapexa	Emoji	
Outlander	Running Press Book Publishers	Mini kits	Knockout Licensing
	Scorpio Posters	Posters	
	Sellers Publishing	Calendars	
Pitch Perfect 2	Express	Apparel	Universal Studios Partnerships & Licensing
Sandra Magsamen	1-800-Flowers.com*	Containers, gifts	Mixed Media Group
	Sourcebooks*	Calendars, coupon books, gift books, picture books	
Shopkins	Sambro Intl.	Backpacks, bags, umbrellas	Moose Toys
SkyDoesMinecraft	Jazwares	Action figures, plush	Maker Studios SkyDoesMinecraft
Smosh	Dynamite Entertainment	Comics, graphic novels	Joester Loria Group
Star Wars	Concept One Accessories	Bags, belts, cold weather accessories, headwear (women's, junior's), wallets	Disney Consumer Products
Tokidoki		Bags, belts, board shorts, cold weather accessories, footwear, hats, luggage, wallets	Giuliano/Rafferty Branding Group (GRBranding)
Woodstock	Fifth Sun	Fashion tops (junior's)	Epic Rights
	Hybrid Apparel	Apparel	
	Neff Headwear	Apparel (juniors', men's)	
Yu-Gi-Oh!	Kaleidoscope Youth, Family, Millennials div. Kaleidoscope Marketing Group*	Trading cards	Konami Digital Entertainment
Zombies vs. Robot	Trau & Loevner	Fleece hoodies, night shirts, t-shirts	Idea Patch

## International Properties Available or Recently Assigned

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
Art Marketing	Collection of over 10,000 images previously licensed in the U.K. for wall art.	All (Worldwide)	Adam Meiklejohn, Meiklejohn Graphics Licensing (MGL)
Everyday California	Style-focused lifestyle brand based in an action water sports company and apparel line from the legendary shores of La Jolla.	All (Worldwide)	Henry Stupp, Cherokee Global Brands
Hard Candy Fitness	Fitness club brand founded by Madonna and inspired by her passion for fitness and health with strong music, dance, and entertainment element.	All (Worldwide)	Lisa Streff, Epic Rights
Mentos	Mint brand sold in more than 130 countries worldwide, targeting lifestyle categories for young adults.	Apparel, electronic accessories, health & beauty aids, sporting goods (France)	Aude Steinberg, Stories
Sharon Turner	U.K. artist with diverse collection of pattern designs, graphics, and illustrations.	All (Worldwide)	Adam Meiklejohn, Meiklejohn Graphics Licensing (MGL)

## International Licenses Recently Granted

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Animal Planet	Time Inc.	Books (U.K., Australia: 3 years)	Discovery Consumer Products
Anne Stokes	Zippo Manufacturing	Lighters (Worldwide)	Art Ask Agency
Buck Wear	Willow Creek Press	Wall calendars (U.S., Canada)	MHS Licensing + Consulting
Christine Adolph	Great Finds	Textiles (U.S., Canada)	
	Laural Home	Duvet sets, shower curtains (U.S., Canada)	
Clangers	B.M. Fashion Ltd. t/a Fashion U.K.	Apparel (children's) (U.K.)	Coolabi
	Dreamtex	Home goods (U.K.)	
	Jo-Y-Jo Ltd.	Knit accessories, knitwear (U.K.)	
	Redan Publishing	Magazines, workbooks (U.K.)	
	StoryToys	Mobile book apps, mobile game apps (U.K.)	

\*Extension or renewal.

*Continued on page 8*

## Licensing News *Continued from page 7*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY	
<b>Corbert Gauthier</b>	Andrews + Blaine	Puzzles (Worldwide)	MHS Licensing + Consulting	
	Signature Brands	Tins (U.S., Canada)		
<b>Courtney Morgenstern</b>	StyleCraft Home Collection	Lamps (U.S., Canada)		
<b>Crantston</b>	Unique Industries	Party paperware (U.S., Canada)		
<b>Darrell Bush</b>	Laural Home	Duvet sets, shower curtains (U.S., Canada)		
<b>Designs By Lolita</b>	Enesco/Department 56	Glassware (Worldwide)	Designs by Lolita	
<b>Farah Vintage</b>	South Pacific Apparel	Sportswear (men's) (ANZ)	Perry Ellis Intl. Europe Ltd./PEI Licensing	
<b>Gorjuss</b>	Preca Brummel S.p.A.	Apparel (girls') (Italy)	Santoro Licensing	
<b>James Meger</b>	Laural Home	Bath accessories, duvet sets, shower curtains (U.S., Canada)	MHS Licensing + Consulting	
<b>JCB</b>	Kids Bee Happy Ltd.	Sand art (U.K.)	JCB Consumer Products	
	Sambro Intl.	Back-to-school, dinnerware, luggage (U.K.)		
	Zippy	Apparel (infants') (U.K.)		
<b>Lalaloopsy</b>	Burger King	Promotional toys (Worldwide)	MGA Entertainment	
<b>Laundry by Shelli Segal</b>	Grace Home Fashions	Bedding (U.S., Canada)	Perry Ellis Intl./PEI Licensing	
<b>LEGO Friends</b>	Topps Europe Ltd.	Sticker albums, sticker collections (U.K.)	LEGO Systems	
<b>Mr. Men &amp; Little Miss</b>	Scimitar Sports	Cycling jerseys, running vests (U.K.)	Sanrio GmbH	
<b>My First JCB</b>	Gemma Intl.	Gift wrap, greeting cards (U.K.)	JCB Consumer Products	
	Kids Bee Happy Ltd.	Sand art (U.K.)		
<b>Paw Patrol</b>	Danilo Promotions Ltd.	Gift wrap, greeting cards (U.K.)	Nickelodeon & Viacom Consumer Products	
<b>Shopkins</b>	Blue Orange Games	Board games (U.S., Canada)	Licensing Shop (The)	
	Cardinal Industries	Games (U.S., Canada)		
	Mrs. Grossman's	Stickers (U.S., Canada)		
	NTD Apparel	Master apparel (Canada)		
	Radz Brands	Candy dispensers, novelty candies (U.S., Canada)		
	Roy Lowe & Sons Ltd.	Socks (U.K.)		Moose Toys
	Tech 4 Kids	Novelty lighting (U.S., Canada)		Licensing Shop (The)
Trends International	Posters (U.S., Canada)			
<b>Sluggterra</b>	Burger King	Promotional toys (Worldwide)	DHX Media	
<b>Thomas Edison's Secret Lab</b>	Wicked Cool Toys	Master toy (Worldwide)	Genius Brands Intl.	
<b>Tina Higgins</b>	Raz Imports	Ornaments, pillows, wall decor (Worldwide)	MHS Licensing + Consulting	
<b>Tokidoki</b>	Blueprint Collections	Stationery (U.K.)	tokidoki	
	NJ Screen Prints Ltd.	Fashion apparel (teen girl's) (U.K.)	Bloom	
	SLG	Cosmetic accessories, lip gloss, nail polish (U.K.)		
	VMC Accessories	Electronic accessories, fashion accessories (U.K.) Cosmetic accessories, lip gloss, nail polish (U.K.)		
<b>Twirlywoos</b>	HarperCollins Children's Books	Books (Worldwide)	DHX Media	
<b>Tyler Oakley</b>	Simon & Schuster	Books (Worldwide)	CAA	
<b>Wolfblood</b>	Bonnier	E-books, graphic novels, journals, novels, poster books (U.K.)	Bulldog Licensing	
<b>Woodstock</b>	Lauren Moshi	Apparel (U.S., Japan, Europe, China, Australia)	Epic Rights	
	Padma Textiles	T-shirts (Worldwide)		

\*Extension or renewal.

## Benchmark Royalty Rates, Guarantees & Advances



### DO YOU KNOW?

- ▶ The average royalty across all property types and product categories?
- ▶ Which three property types earn the highest royalties?
- ▶ Which three product categories pay the highest royalties?
- ▶ The range of guarantees for licensing agreements?
- ▶ How long the average licensing contract runs by property type and product category?

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# contacts & connections

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

**1-800-Flowers.com**, Lisa Hendrikson, VP Brand Strategy & Marketing, 718-745-0200, lisahendrikson@1800flowers.com, P. 7.

**Accessory Innovations**, Karyn Weiss, SVP Business Development & Licensing, 212-292-1238, kweiss@accessory-innovations.com, P. 6.

**Acco Brands**, Kendra Hull, Licensing Account Manager, 937-495-2466, kendra.hull@acco.com, P. 6.

**Alchemy 3**, Jeffrey Schweig, President & CMO, 770-442-6993, js@alchemy3.com, P. 6.

**American Classics**, David Brown, President, 256-737-9995, david@americanclassics.bz, P. 6.

**American Kennel Club**, Daphna Straus, VP Business Development, 212-696-8243, dxs@akc.org, P. 6.

**Andrews + Blaine**, Brandie Oliver, Public Relations & Licensing Manager, 850-368-3604, brandie@andrewsblaine.com, P. 8.

**Argento SC by Sicura Inc.**, Steven Scaba, President, 212-704-2006, steven@argentosc.com, P. 6.

**Authentic Brands Group**, Jamie Salter, Chairman & CEO, 212-760-2412, jsalter@abg-nyc.com, P. 6.

**Bentex Group**, Susan Peia, VP Licensing, 212-594-4250 x168, susan@bentex.com, P. 6.

**Big Lots**, Richard Chene, EVP & Chief Merchandising Officer, 614-278-6800, richardchene@biglots.com, P. 6.

**Blue Orange Games**, Julien Mayot, Co-founder & CEO, 415-252-0372, julien@blueorangegames.com, P. 8.

**Bonnier**, Julie Smartz, VP & GM Brand Development, 407-637-3652, julie.smartz@bonniercorp.com, P. 8.

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

**Brand Liaison (The)**, Steven Heller, Founder, 855-843-5424, steven@thebrandliaison.com, P. 6.

**Brandr Group (The)**, Wesley Haynes, President & CEO, 904-860-3249, wesley.haynes@thebrandr.com, P. 7.

**Burger King**, Alex Macedo, President North America, 305-378-3000, amacedo@whopper.com, P. 8.

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

**CAA**, Caitlin Hoyt, Literary Agent, 424-288-2000, choyt@caa.com, P. 8.

**Cardinal Industries**, Joel Berger, President, 718-784-3000 x114, joelb@cardinalgames.com, P. 8.

**Cherokee Global Brands**, Henry Stupp, CEO, 818-908-9868 x306, henrys@cherokeeglobalbrands.com, P. 7.

**Concept One Accessories**, Bernie Hafif, VP Licensing & Acquisitions, 212-868-2590, bernie@concept1.com, P. 7.

**Creative Apparel Concepts**, Ben Gray, Owner, 612-843-1845, ben@creativeapparelconcepts.com, P. 6.

**Delta Children's Products**, Jennifer Snyder, VP Licensing, 800-377-3777 x6565, jsnyder@deltanyc.com, P. 6.

**Designs by Lolita**, David Self, VP, 912-661-5075, david@designsbylolita.com, P. 8.

**Discovery Consumer Products**, Conal Byrne, VP Digital Media, 240-662-2000, conal\_byrne@discovery.com, P. 6.

**Discovery Consumer Products**, Sue Perez-Jackson, Licensing Director North America: Home, Publishing, Apparel, Accessories, Travel, Experiential, Gift & Seasonal, Stationery, Food & Beverage, 240-662-5419, sue\_perez-jackson@discovery.com, P. 7.

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

**Disney Consumer Products**, Paul Southern, SVP Licensing Star Wars, 415-623-1928, paul.southern@lucasfilm.com, P. 6,7.

**Disney Consumer Products**, Stephen Teglas, SVP Licensing Disney Princess & Disney Fairies, 818-544-0466, stephen.teglas@disney.com, P. 6.

**Divatex Home Fashions**, Avi Gross, President, 212-252-0802, agross@divatex.com, P. 6.

**Drizzle Art**, Robert Holton, Artist & Owner, 714-343-3043, robert@drizzleart.com, P. 6.

**DuPont**, Lynne Chappel, Global Leader Trademark Licensing, 302-999-2121, lynne.chappel@dupont.com, P. 6.

**Dynamite Entertainment**, Rich Young, Director Business Development, 856-312-1040 x107, rich.young@dynamite.com, P. 7.

**Enesco**, Mary Seitz-Pagano, Director Strategic Brand Licensing, 630-875-5841, mseitzpagano@enesco.com, P. 8.

**Epic Rights**, Lisa Streff, EVP Global Licensing, 310-424-1908, lisa@epicrights.com, P. 6,7,8.

**Exim Licensing**, Elias Hofman, President, 305-534-1900, ehofman@eximlicensing.com, P. 6.

**Express**, Patrice Croci, VP Brand Marketing, 614-474-7000, pcroci@express.com, P. 7.

**Fantasia Accessories**, Michael Brett, EVP, 212-391-1080, mbrett@fantasia.com, P. 6.

**Fifth Sun**, Dan Gonzalez, Owner & President, 530-343-8725, dan@5sun.com, P. 7.

**Firefly Brand Management**, Cynthia Modders, Owner, 415-513-5826, cynthiamodders@fireflybrandmanagement.com, P. 6.

**Franco Manufacturing**, Jeffrey Franco, Licensing Director, 732-494-0500 x398, jeffrey@franco-mfg.com, P. 6.

**Freaker USA**, Michael Barr, President & COO, 910-399-3988, michael@freakerusa.com, P. 7.

**Fright Rags**, Ben Scrivens, Founder, 585-730-8280, ben@fright-rags.com, P. 6.

**Funko**, Brian Mariotti, President & CEO, 425-783-3616, brian@funko.com, P. 6.

**Fuzion Creations**, Maney Douek, President, 718-369-8800, info@fzncreations.com, P. 6.

**Genius Brands Intl.**, Amy Moynihan Heyward, President, 310-273-4222, amy@gnusbrands.com, P. 8.

**Giuliano/Rafferty Branding Group (GRBranding)**, Mary Rafferty, Owner, 818-970-4176, mary@grbranding.com, P. 7.

**Grace Home Fashions**, Neeraj Jalan, Director, 212-273-0760, neeraj@ghcl.co.in, P. 8.

**Great Finds**, Karolyn Howard, President, 402-239-9633, karolyn@greatfinds.biz, P. 7.

**Guggenheim Media**, Francisco Arenas, SVP Business Development & Licensing, 212-739-0700, francisco.arenas@guggenheimpartners.com, P. 6.

**HarperCollins Children's Books**, Beth Ziemacki, Senior Manager Subsidiary Rights, 212-207-7000, beth.ziemacki@harpercollins.com, P. 8.

**Hybrid Apparel**, Derrick Baca, VP Licensing, 714-947-8347, dbaca@hybridapparel.com, P. 7.

**HyperPower Game Group**, Clark Nesselrodt, CEO & Co-founder, 917-599-6700, info@hyperpowergames.com, P. 6.

**Idea Patch**, Anietra Guzman-Santana, CEO & Founder, 917-496-8550, anietra@idea-patch.com, P. 6,7.

**Jazwares**, Laura Zebersky, EVP Global Sales & Licensing, 954-845-0800, laura@jazwares.com, P. 6,7.

**Joester Loria Group**, James Slifer, SVP Business Development, 212-683-8548, jslifer@tjlg.com, P. 6,7.

**Kaleidoscope Youth**, Family, Millennials div. Kaleidoscope Marketing Group, Mindelle Ziff, Founder & CEO, 843-853-9700, mindelle@kyfm.com, P. 7.

**Knockout Licensing**, Tamra Knepper, Co-President, 212-947-5958, tk@knockoutlicensing.com, P. 7.

**Konami Digital Entertainment**, Yumi Hoashi, VP Card Business, 310-220-8100, licensing\_usa@konami.com, P. 7.

**Laural Home**, Don Tweel, President, 201-264-6020, don@lauralhome.com, P. 7,8.

**Lauren Moshi**, Lauren Moshi, Owner, 323-888-8838, lauren@laurenmoshi.com, P. 8.

**Le Cordon Bleu**, Christine Annechino, Director Global Licensing, 917-593-4797, cannechino@cordonbleu.edu, P. 6.

**LEGO Systems**, Kristen Allshouse, Licensing Manager, 860-749-2291, kristen.allshouse@lego.com, P. 8.

**Luxe Brands**, Tony Bajaj, President, 954-791-6050, tony@luxebands.com, P. 2.

**Mad Engine**, Carolyn Foreman, VP Licensing, 858-558-5270, carolyn@madengine.com, P. 6.

**Maker Studios**, Courtney Holt, Chief Strategy Officer, 310-606-2182, cholt@makerstudios.com, P. 6,7.

**Martha Stewart Living Omnimedia**, Ann Henry, SVP Finance & Merchandising, 212-827-8650, ahenry@marthastewart.com, P. 6.

**MGA Entertainment**, Diana Luna, Director Intl. Licensing, 630-219-1981, dluna@mgae.com, P. 8.

**MHS Licensing + Consulting**, Marty Segelbaum, President, 952-544-1377 x202, marty@mhslicensing.com, P. 7,8.

**Mishka ( )**, Greg Rivera, President & Co-Owner, 888-724-0178 x101, greg@mishkany.com, P. 6.

**Mixed Media Group**, Trina Storfer, Founding Partner, 212-683-5055, tstorfer@mixedmediagroup.com, P. 6,7.

**Mondelez Intl.**, Paula Phillips, Global Retail Trademark Licensing, 502-551-5846, paula.phillips@mdlz.com, P. 6.

**Mrs. Grossman's**, Jason Grossman, CEO, 707-763-1700, mgpc@mrsgrossmans.com, P. 8.

**National Geographic Society**, Krista Newberry, SVP Licensing North America, 202-857-7374, knewberr@ngs.org, P. 6.

**Neff Headwear**, Travis Matsdorf, Director Business Development, 805-644-6333, travis@neffheadwear.com, P. 7.

**NFL Players**, Steve Scabelo, VP Licensing & Business Development, 202-572-7472, steven.scabelo@nflplayers.com, P. 7.

**Nickelodeon & Viacom Consumer Products**, Manuel Torres, SVP Global Toys & Publishing, 212-846-4735, manuel.torres@vimm.com, P. 8.

**Original Retro Brand**, Marc Herman, CEO, 323-583-4508 x241, mherman@originalretrobrand.com, P. 6.

**Paws, Inc.**, Jill Davis, SVP Licensing, 765-287-2222, jill@pawsinc.com, P. 2.

**PepsiCo**, Kathy Kennedy, Marketing Director Pepsi Lipton Partnership, 914-253-2000, kathy.kennedy@unilever.com, P. 6.

Continued on page 10

**Perry Ellis Intl./PEI Licensing**, Pamela Fields, VP Intl. Development & Licensing, 212-536-5602, pamelafields@perry.com, P. 8.

**Perryscope Productions**, Norman Perry, President, 646-437-1069, norman@perryscope.us, P. 7,8.

**QVC**, Ken O'Brien, SVP Merchandising, 484-701-1000, kobrien@qvc.com, P. 6.

**Radz Brands**, Megan Guild, Key Account Manager, 503-227-2226, megan@radzbrands.com, P. 8.

**RAJ Manufacturing**, Lori Miyamoto McAveney, Director Licensing & Merchandising, 714-838-3110, lmcaveney@rajman.com, P. 6.

**Raz Imports**, Meg Silva, 817-375-6223, msilva@razimports.com, P. 8.

**Reebok Intl.**, Linne Kimball, Head Licensing, 781-401-4669, linne.kimball@reebok.com, P. 7.

**Rovio Entertainment**, Randi Spieker, VP Consumer Products & Retail, 310-775-1107, randi.spieker@rovio.com, P. 6.

**Running Press Book Publishers**, Margaret Milnes, Senior Director Brand Management, 215-567-5080, margaret.milnes@perseusbooks.com, P. 7.

**SCL Footwear Group**, Lee Lemon, President Sales, 212-904-1010, info@scfootwear.com, P. 6.

**Scorpio Posters**, Frank Scorpio, President, 718-499-2001, info@scorpioposters.com, P. 7.

**Sellers Publishing**, Ronnie Sellers, President, 207-772-6833, rsellers@rsvp.com, P. 7.

**SG Footwear div. SG Companies**, Elisa Gangl, VP Licensing & Marketing, 201-342-1200, elisag@thesgcompanies.com, P. 6.

**Signature Brands**, Chris King, Senior Brand Manager, 877-726-8793, cking@signaturebrands.com, P. 8.

**Simon & Schuster**, Jeremie Ruby-Strauss, Senior Editor, 212-698-7000, jeremie.ruby-strauss@simonandschuster.com, P. 8.

**SkyDoesMinecraft**, Adam Dahlberg, skydoesbusiness@gmail.com, P. 7.

**Sourcebooks**, Dominique Raccach, CEO & Publisher, 630-961-3900, info@sourcebooks.com, P. 7.

**StyleCraft Home Collection**, Rob Duerstock, VP, 662-429-5279, rduerstock@stylecraft-us.com, P. 8.

**Tapinator**, Ilya Nikolayev, CEO, 914-930-6232, info@tapinator.com, P. 6.

**Time Inc.**, James Jacovides, SVP Intl. Licensing & Development, 212-522-4758, jim\_jacovides@timeinc.com, P. 7.

**tokidoki**, Pooneh Mohajer, CEO & Co-founder, 323-930-0555, pooneh@tokidoki.it, P. 8.

**TOMS**, Doug Piwinski, SVP Global Marketing & Communications, 310-566-3170 x194, doug@toms.com, P. 6.

**Trau & Loevner**, Howard Loevner, President, 412-361-7700, hloevner@trau-loevner.com, P. 7.

**Trends International**, Jeff Loeser, VP Licensing, 317-388-4068, jloeser@trendsinternational.com, P. 8.

**Unique Industries**, Scott Brown, VP Licensing, 215-336-4300 x7708, sbrown@favors.com, P. 8.

**Universal Studios Partnerships & Licensing**, Cindy Chang, SVP Consumer Products, 818-777-2067, cindy.chang@nbcuni.com, P. 6,7.

**Wicked Cool Toys**, Michael Rinzler, Co-President & Founding Partner, 267-536-9186, rinz@wickedcooltoys.com, P. 8.

**Willow Creek Press**, Jeremy Petrie, VP Sales, 715-358-7010, jpetrie@willowcreekpress.com, P. 7.

**Xcel Brands**, Robert D'Loren, Chairman & CEO, 347-727-2474, rdloren@xcelbrands.com, P. 6.

**Zapexa**, Alasdair Chesney, Director, a.chesney@zapexa.com, P. 7.

**Zippo Manufacturing**, Violet Snyder, Global Licensing Director, 814-368-2889, snyderv@zippo.com, P. 7.



## 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.

**Art Ask Agency**, Maria Strid, President, 34 936 452 225, maria@artaskagency.com, P. 7.

**B.M. Fashion Ltd. t/a Fashion U.K.**, Gurdev Mattu, Director, 44 116 276 2929, gurdev@fashions-uk.com, P. 7.

**Bloom**, Libby Grant, Director, 44 20 7097 8920, libby@wearbloom.co.uk, P. 8.

**Blueprint Collections**, Lisa Shand, Managing Director, 845 217 2400, lisa.shand@bluecoll.co.uk, P. 8.

**Bulldog Licensing**, Vicky Hill, Licensing Manager, 44 20 8325 5455, vickyh@bulldog-licensing.com, P. 8.

**Coolabi**, Valerie Fry, Director Sales/Licensing, 44 20 7004 0980, valerie.fry@coolabi.com, P. 7.

**Corus Entertainment/Nelvana Enterprises**, Andrew Kerr, Co-head, 416-479-7000, andrew.kerr@corusent.com, P. 6.

**Danilo Promotions Ltd.**, Trevor Jones, Licensing Director, 44 1992 702 903, tjones@danilo.com, P. 8.

**DHX Media**, Peter Byrne, EVP DHX Brands & CEO CPLG, 44 20 8563 6400, peter.byrne@dhxmedia.com, P. 8.

**DHX Media**, Tom Roe, Commercial Director DHX Brands, 44 20 8563 6400, tom.roe@dhxmedia.com, P. 8.

**Dreamtex**, Andrew Downie, Commercial Director, 44 844 499 8465, enquiries@dreamtexltd.com, P. 7.

**ExplodingTNT**, Samuel Ray, 647-785-8842, business@explodingtnt.com, P. 6.

**Gemma Intl.**, Tim Rudd-Clarke, Licensing Director, 44 1264 388 400, timr@gemma-international.co.uk, P. 8.

**Halfbrick**, Shainiel Deo, CEO, 61 7 3356 0429, sdeo@halfbrick.com, P. 6.

**Identity Games**, Emile Kalis, Owner, 31 10 201 4555, emile@identitygames.nl, P. 7.

**IMG Worldwide**, Fabrice Faurie, VP Licensing & Consumer Products Worldwide, 44 20 8233 5300, fabrice.faurie@img.com, P. 6.

**JCB Consumer Products**, Sam Johnson, Senior Licensing Manager, 44 1889 590 312, sam.johnson@jcb.com, P. 8.

**Jo-Y-Jo Ltd.**, Mark Corness, Managing Director, 44 161 817 8888, P. 7.

**Kids Bee Happy Ltd.**, Sandra Patterson, Director, 44 1292 314 811, sandra@kidsbeehappy.com, P. 8.

**Licensing Shop (The)**, Nancy Fowler, EVP, 416-322-7300 x202, nancy@thelicensingshop.com, P. 8.

**Meiklejohn Graphics Licensing (MGL)**, Adam Meiklejohn, Licensing Director, 44 20 7593 0510 x4, adam@mgllicensing.com, P. 7.

**Moose Toys**, Nicole Hardiman, Senior Licensing Manager, 61 3 9579 7377, licensing@moosetoys.com, P. 8.

**NJ Screen Prints Ltd.**, Andy Wilebore, Owner, 44 1455 848 575, enquiries@njscreenprints.co.uk, P. 8.

**NTD Apparel**, Michael Eliesen, Owner, 514-341-8330, michaele@ntdapparel.com, P. 8.

**Padma Textiles**, Anna, 356 275 02 700, anna@padmatextiles.com, P. 7.

**Perfetti Van Melle**, Marta Ballesteros, Licensing Area Manager, 34 937 73 92 00, marta.ballesteros@es.pvmgrp.com, P. 7.

**Perry Ellis Intl. Europe Ltd./PEI Licensing**, Anthony Pessok, Licensing Manager, 353 1 405 3840, anthony.pessok@perry.com, P. 8.

**Precia Brummel S.p.A.**, Francesca Campani, Licensing, 39 0331 98 81 11, francesca.campani@precabrummel.com, P. 8.

**Redan Publishing**, Robert Sutherland, Chairman, 44 1743 364 433, robert@redan.com, P. 7.

**Roy Lowe & Sons Ltd.**, Martin Lowe, Managing Director, 44 1623 441 144, martin@roylowe.co.uk, P. 8.

**SA Designer Parfums Ltd.**, Parag Vidyarthi, General Manager, 44 1923 208 111, parag@designerparfums.com, P. 2.

**Sambro Intl.**, Nikki Samuels, Director Licensing, 44 845 873 9380, nikki@sambro.co.uk, P. 6,7,8.

**Sanrio GmbH**, Alastair McHarrie, Head U.K. Licensing, amcharrie@sanriolicense.com, P. 8.

**Santoro Licensing**, Meera Santoro, President, 44 20 8781 1104, meera@santorographics.com, P. 8.

**Scimitar Sports**, Cat Ford, Marketing Manager, 44 1905 425 324, cat@scimitarsports.com, P. 8.

**SLG**, Lucy Braithwaite, Licensing Manager, 44 1242 225 720, lbraithwaite@slguk.com, P. 8.

**SodaStream Intl.**, Daniel Birnbaum, CEO, 972 3 976 2451, dbirnbaum@sodastream.com, P. 6.

**South Pacific Apparel**, Andy Williams, CEO, 61 2 8011 3491, awilliams@farah.com.au, P. 8.

**Stories**, Aude Steinberg, Founder, 33 6 33 49 51 83, aude.steinberg@thestories.fr, P. 7.

**StoryToys**, Gavin Barrett, Commercial Director, 353 16 718 952, gavin.barrett@storytoys.com, P. 7.

**Tech 4 Kids**, Brad Pedersen, President & CEO, 905-629-3836, brad@tech4kids.com, P. 8.

**Topps Europe Ltd.**, Chris Rodman, VP, 44 1908 800 100, chris.rodman@topps.co.uk, P. 8.

**Ugg Since 1974**, Richard Friedrichs, CEO & Owner, 61 7 5520 4066, info@uggaustralianmade.com.au, P. 6.

**VMC Accessories**, Laura Sumner, Commercial Director, 44 1538 392 500, laura.sumner@vmc.co.uk, P. 8.

**Zippy**, Nicole Graham, Founder, 44 1625 540 249, customercare@zippysuit.com, P. 8.

## Peppa Pig Joins the \$1 Billion Club

Continued from page 1

### The Peppa Licensing Program

Peppa Pig began airing in the U.K. in 2004. In the U.S., it bounced around Cartoon Network and Noggin before settling on Nick Jr., which currently runs the show seven days a week. It airs in 180 countries around the globe and has licensing programs in 50 countries.

As a licensed brand, Peppa is still getting established in the U.S. Entertainment One signed Jazwares as its master toy partner in 2014, when it also added VTech and Penwizard to existing licensees Fischer-Price, Scholastic and Candlewick Press. In its recent financial report, eOne said the brand launched recently with a small number of lines in Walmart, “which will grow steadily over time and is expected to mirror the growth profile achieved in the U.K.” Peppa products will launch in Target this summer, the company said. The brand is also in Toys R Us.

With an established presence in Italy, Spain and Australia as well as the U.S., eOne is focusing on rolling out Peppa Pig merchandise in new European markets, Brazil and China. The company said mass rollouts for the property are expected in France and Germany in 2016.

### LAST YEAR'S \$1 BILLION CLUB (2013)

Mickey & Friends (Disney)	\$4.0 billion
Hello Kitty (Sanrio)	\$3.9 billion
Disney Princess (Disney)	\$2.9 billion
Winnie the Pooh (Disney)	\$2.8 billion
Cars (Disney)	\$2.3 billion
Star Wars (Lucasfilm/Disney)	\$2.2 billion
Angry Birds (Rovio)	\$1.9 billion
Monsters University (Disney)	\$1.5 billion
Spider-Man (Marvel/Disney)	\$1.3 billion
Peanuts (Peanuts Worldwide—since acquired by Iconix)	\$1.2 billion

SOURCE: THE LICENSING LETTER

eOne owns half of the property's underlying rights, but controls the worldwide marketing of the brand.

The company's reported revenue for fiscal 2015, ended March 31, fell 5% to £785.8 million (\$1.2 billion), but profit before tax doubled to £44.0 million (\$68.2 million). Its film revenues dropped, but were offset by growing TV revenues, including its family and licensing business. Family and licensing revenues grew 71% to £60.8 million (\$94.2 million), due largely to Peppa.

## ART LICENSING

### 10 Things about the Current State of Art Design Licensing You Need to Know

If you couldn't make it to last month's SURTEX conference in NYC, here are key takeaways about the current state of licensing of surface designs for home goods, fashion, paper and other goods, courtesy of consultant Jeff Grinspan who put together the conference program:

1. Although the industry is more competitive than ever, it's also rife with opportunity;
2. More retailers are turning to artistic design to lure customers into stores;
3. Designs must be constantly refreshed to maintain the allure;
4. To succeed in this environment, artists must constantly come up with new designs;
5. Artists must also be “authentic” and in touch with cultural trends;
6. Tattoos and graffiti are a leading source of inspiration for modern art design;
7. Artists must also design for their target—manufacturers, retailers, consumers;
8. Artist royalties are lower than ever;
9. “Guarantees” and “advances” have become endangered species;
10. As licensing revenues decline, artists must pursue outside ventures to make a living.

### Art Licensing: Sales & Royalties

Total retail sales of licensed art properties in the U.S. and Canada, including not just surface designs but fine art, generated \$5.548 billion in 2014, according to *TLL's Annual Licensing Business Survey*.

Among the 13 major property types tracked by TLL, art was one of only four in which average royalty rates fell in 2014. The average royalty for art properties was 6.25% in 2014, down from 6.30% a year earlier. The art and artists subcategory had a slightly higher royalty rate than museums, but it fell more year-over-year. The average royalty for art and artists was 6.35%, a decline of 1.2% from 6.43% in 2013. Museum property royalties averaged 6.15%, down just 0.5% from 6.18% in 2013. The range of royalties is 4% to 12% for art and artists, and 4% to 15% for museums.

## CHARACTER/ENTERTAINMENT PROPERTIES

### Hello Kitty Hits the Road

Hello Kitty, one of the properties widely believed to have been squeezed by Frozen's wild popularity in 2014, is taking to the road to defend her turf. The Sanrio property, an almost \$4 billion globally licensed brand in 2013, is at the center of Hello Kitty's Supercute Friendship Festival, the property's first-ever North America touring show.

Continued on page 12

## Who's News

**John Kristick**, Global CEO of GroupM ESP leads the company's new ESP Properties and ESP Brands, which serve sports and entertainments rightsholders in identifying and negotiating partnerships. ESP Brands is managed regionally by North American CEO Bryce Townsend.

**Sebastian Nystrom** moves to Head of Strategy for Finnish grocery retailer S Group, from Head of New Products/Brand Licensing at Nokia's Technologies unit. Nokia is currently looking into returning to the smartphones business through licensing after selling its phone business to Microsoft last year.

Perry Ellis International, Inc. promotes **Oscar Feldenkreis** to CEO at the start of its next fiscal year, from President/Chief Operating Officer, a role he has held since 1993. He replaces company founder George Feldenkreis, who transitions from CEO/Chairman to Executive Chairman of the Board.

Guggenheim Media Group, owner of *The Hollywood Reporter* and *Billboard*, names **Francisco Arenas** SVP Business Development & Licensing, with the mandate of reaching younger audiences through branded products, promotions, retail activations and events.

**Alicia Brattin** becomes Director Licensing for Electronic Arts' PopCap Games in an expansion of EA's entertainment and licensing group and Popcap's Plants vs. Zombies franchise. She was Licensing/Business Operations Manager for Microsoft's Halo.

**Trish Whalen** becomes VP Business Development for the Ivanka Trump Collection, a role in which she will pursue new licensing partnerships. She previously headed Maxim magazine's domestic licensing division.

Ralph Lauren Corp. promotes **Christopher H. Peterson** to President Global Brands, from EVP Chief Financial Officer as part of a global brand management restructuring. There will be six brand groups: the Ralph Lauren luxury brands, excluding home, under Valerie Hermann as brand President; Polo; Denim & Supply; Lauren, Chaps and American Living in the same group; Ralph Lauren Home, and Club Monaco.

## Hello Kitty Hits the Road

*Continued from page 11*

The live entertainment show will stage more than 100 performances in at least 18 North American markets through October. Festival stops include a multi-stage show, interactive exhibits, cosplay fashion parade and, of course, lots and lots of Hello Kitty tour merchandise.

Hello Kitty ranked No. 3 on TLL's most recent list of \$100 million-plus properties, with an estimated \$1.1 billion in retail sales of licensed merchandise in the U.S. and Canada for 2013, and \$3.9 billion in global retail sales. Those figures represented a 3% decline in the U.S. and Canada and a 5% dropoff outside of North America, when compared to 2012, before the property would have felt any *Frozen* effect. The *Frozen* movie was released theatrically in late 2013, and become a licensing phenomenon the next year. It is expected to show up as a \$1 billion brand, or close to it, for 2014 on TLL's next ranking, due later this year.

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