

TLL THE LICENSING LETTER

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

Inside This Issue

Licensing Ledger.....	2
Licensing News.....	5
Contacts & Connections	11
M&A: Fashion	17
Esports Tracker: New Leagues & Expansions	19
Read Before Using: \$100 MM List Definitions & Methodology	20
37 Entertainment/Character Brands Earned Over \$100 MM in the U.S./Canada....	20
I Need a Hero! Super-based Merch Sales Down 7%	24
New Content: Film, TV & Digital Ventures	25
Specialty Food in 2018: Tea, Tacos & Tang	26
Back-to-School Shoppers Dragging Their Feet	27
Stage Shows, Events & Attractions	28
Fashion Track: Activations & Collaborations	29
Affluents Prefer Shopping Chanel, Nordstrom	30
Newspapers & Magazines Shake Things Up	30
Who's News.....	31

Licensed Entertainment/Character Sales Hit \$31.1 Billion Worldwide; Soft Goods Lead Growth

Entertainment/character-based licensed goods continue to grow at a faster rate than any of the other five major property types *TLL* tracks globally—as well as the 13 major properties we track within the U.S./Canada territory.

In the U.S./Canada, entertainment/character-based licensing grew by \$435 million in 2017 to reach \$13.2 billion in retail sales, or just over 12% of the territory total.

Internationally, the category was up 3.1% to reach \$17.9 billion in licensed retail sales. In 2017, the U.S./Canada was a major driver of growth in retail sales worldwide; the territory constitutes just under 43% of all global sales for the property type.

But growth rates were far from uniform in 2017—the brand landscape was extremely volatile, with a handful of brands single-handedly lifting the category from what would have otherwise been double-digit declines. Such brand volatility and consumer fatigue emerged even before Toys ‘R’ Us announced bankruptcy in late 2017—and, to put it mildly, that development wasn’t too helpful for the health of the toys/games industry. Thanks in part to TRU’s demise, the share of licensed entertainment/character sales made through specialty retailers declined in 2017.

For example, superheroes retain a super-sized influence in the licensing business, with respondents to *TLL’s Licensing Business Survey* reporting double-digit sales growth for A-list properties like Marvel and DC Comics in 2017.

On the other hand, many were disappointed by underperforming “sure hits” like *Cars 3* and *Despicable Me 3*—even Star Wars stumbled, although it continued to perform relatively well (think low-double-digit growth versus the triple-digit gains seen with the first Star Wars reboot).

Notably, the “character” part of the “entertainment/character” continued to record stiff declines. Retail sales of licensed merchandise for characters like Sanrio’s Hello Kitty and Disney’s Mickey & Minnie continue to trend downwards worldwide.

Just 37 entertainment/character brands made *TLL’s 100 Million* list (page 16).

Continued on page 3

E-COMMERCE

E-commerce Sales Surge as Specialty Purges Entertainment/Character

Retail sales of licensed merchandise based on entertainment/character properties grew to reach \$31.1 billion worldwide, according to *TLL’s Licensing Business Survey*. In the U.S./Canada, retail sales grew 3.4% to reach \$13.2 billion.

Across the board, *Survey* respondents reported that social media is now a dominant means of fan engagement and marketing. And particularly in entertainment/character, many are reporting that their largest retail sales gains have been from e-commerce rather than brick-and-mortar, where buy-ins are lower and margins are tighter.

Retail sales of licensed entertainment/character-based merchandise through e-commerce sales grew 11.1% in 2017 to reach \$6.1 billion. The increase can be attributed broadly to major e-commerce platforms like Amazon, the online arms of traditional brick-and-mortar retailers, and self-run branded e-commerce shops.

Online sales now make up 17.2% of all sales of licensed entertainment/character-based merchandise. Over 80% of orders are made at brick-and-mortar locations, and 1.3% are orders made through TV shopping, mail order, and “other” distribution channels.

Continued on page 18

➡ Licensing Ledger

The **Walt Disney Co.** signs a \$650 million 99-year lease for 4 Hudson Sq., New York. The media conglomerate is expected to build a new headquarters at the downtown Manhattan location taking up over 1.2 million sq. ft. The high-tech, energy-efficient project will consolidate production and studio spaces from the Upper West Side's WABC-TV headquarters and its Disney Streaming Services, which are now in the Google-owned Chelsea Market. Disney will sell Silverstein Properties several of its Lincoln Square buildings, including much of the current ABC headquarters complex, for \$1 billion. Disney will retain ESPN's offices at 56 W. 66th St. and lease back the rest of the facilities for 5 years while its new headquarters is being completed.

Rumor has it that **Amazon** is planning to publish its first holiday toy catalog this year. The Seattle-based e-commerce giant has plans to distribute the guide by sending them to American households as well as having them handed out at **Whole Foods Market** locations.

Singapore's **One Animation** closes its latest round of funding with Hong Kong's STI Financial Group as its lead Series B investor. The funding will be used to market consumer products based on One's existing IPs, expand merchandise into new territories, develop new IPs, and hire new international talent.

Snoopy is going into deep space with a Space Act Agreement between **Peanuts Worldwide** and **NASA**. With NASA's involvement, Peanuts will work on content for Astronaut Snoopy, including a STEM-based curriculum for students about America's deep space exploration objectives and interactive ways to celebrate next year's 50th anniversary of humans first setting foot on the Moon.

Along with Gen Z, Millennial spending power will account for 45% of the global personal luxury goods market by 2025, according to a recent study by **Bain & Company**.

The global toy market is forecast to hit \$139 billion by 2025, according to the market research firm **Coherent Market Insights**. Its latest

report forecasts that global revenue for the international traditional toys and games market grew 4.84% in 2017 to \$95.97 billion. The biggest growth drivers are territories like China, India, and Brazil—specifically in categories like outdoor and sport toys, puzzles, educational toys, construction sets, and model vehicles. The traditional toys and games market in North America was valued at \$28.73 billion in 2016 by the firm.

Supercell makes history as the first mobile publisher to have two multi-billion-dollar games on the Apple App Store and Google Play, according to market intelligence agency **Sensor Tower**. Mobile battle arena *Clash Royale* has now topped \$2 billion since launching in March 2016. It joins *Clash of Clans*, which itself has now generated over \$6 billion. Players from the U.S. account for the biggest chunk of revenue at around 30%.

Pokémon Go developer **Niantic** nabs **Seismic Games** for an undisclosed fee. Seismic has worked on mobile and VR titles including *Marvel: Strike Force* and *Blade Runner Revelations*.

Spin Master expands further into Europe; it will be selling directly to leading retailers in Russia, Switzerland, Austria, and Greece in 2019. To that end, the toyco has formed a Russian subsidiary, Spin Master Rus LLC, and will begin direct distribution in early 2019. Spin

Master will service the Swiss and Austrian as well as Greek markets directly through existing offices in Germany and Italy, respectively.

Spin Master acquires **Fuggler**, a line of collectible "funny, ugly" monster plush. The toys' characteristics include toothy grins, grimaces, eyes, and signature "button" holes.

Town & Country Living's holding company acquires **Home Dynamix** and **Amalgamated Textiles USA**. The newly combined entity will offer products spanning table linens, kitchen textiles, bath rugs and mats, floor and accent rugs, bedding, pet beds, decorative pillows, window treatments, window hardware, and solution-based home products. Executive leadership of both companies will remain active in the go-forward business entity.

Defy Media sells its flagship *Screen Junkies* brand, a TV, film, and pop culture hub that comprises the *Honest Trailers* YouTube channel, to **Fandom**, a wiki hosting service that operates 400,000 communities across the web centered around fan-centric topics like video games, movies, and television shows.

Snapchat enlists **Kylie Jenner** as its launch partner for its first influencer e-commerce push; a feature in its social media app that allows users to swipe up and buy merchandise like the Kyshadow eyeshot palette. Snap is not taking a percentage of influencers' sales, per a spokesperson's statement to *Digiday*.

Amazon launches a new package delivery service, helping entrepreneurs build their own companies delivering Amazon packages with start-up costs "as low as \$10,000." Amazon will give them access to its delivery technology, hands-on training, and discounts on various assets and services, including vehicle leases and comprehensive insurance.



Executive Editor
Karina Masolova
karina@plainlanguagemedia.com

Managing Editor
Barbara Manning Grimm
barb@plainlanguagemedia.com

Data & Digital Coordinator
Susan Adams
susan@plainlanguagemedia.com

Layout & Graphic Designer
David van der Gulik

Business Development
Randy Cochran
randy@plainlanguagemedia.com

Business Development Manager
Jennifer Frost
jen@plainlanguagemedia.com

Marketing Director
Michael Sherman
michaels@plainlanguagemedia.com

Customer Service
customerservice@plainlanguagemedia.com

General Manager
Jim Pearmain

CEO
Mark Ziebarth

THE LICENSING LETTER (ISSN: 8755-6235) is published 12 times a year by Plain Language Media, LLC. The annual subscription price for THE LICENSING LETTER is \$508.95 per year/\$568.95 outside North America. Low-cost site licenses are available for those who wish to distribute this newsletter to their colleagues at the same firm. Please contact our business development department at randy@plainlanguagemedia.com or 201-747-3737 for details.

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

Licensed Entertainment/Character Sales

Continued from page 1

Product Category Sales Come Home

Apparel and accessories now make up 20% of all entertainment/character brand-based sales in the U.S./Canada at 10% share, or roughly \$1.3 billion, each. Sales of licensed apparel grew 10.9% in 2017 (or \$130 million) compared to accessories' slightly higher 11% growth (\$131 million).

The most rapidly growing categories were in home-based goods such as furniture/home furnishings (24%) and domestics (23%). In sheer dollar amounts, however, such growth was not enough to overcome the roughly \$333 million loss sustained by the dip in the toys/games category.

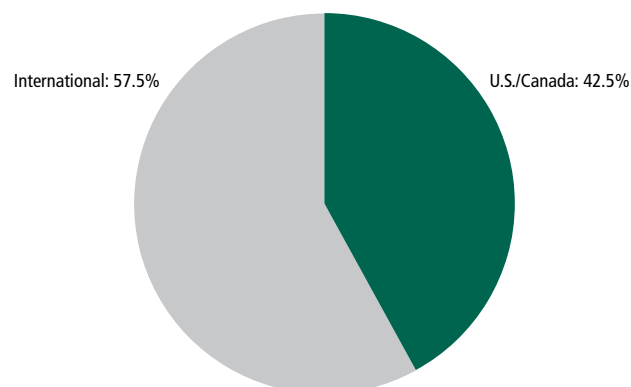
RETAIL SALES OF LICENSED ENTERTAINMENT/CHARACTER MERCHANDISE, BY PRODUCT CATEGORY, U.S. & CANADA, 2016–2017 (Figures in Millions)

PRODUCT CATEGORY	RETAIL SALES, 2017	RETAIL SALES, 2016	CHANGE, 2016–2017	SHARE, 2017
Accessories	\$1,319	\$1,188	11.0%	10.0%
Apparel	\$1,320	\$1,190	10.9%	10.0%
Consumer Electronics	\$547	\$521	5.0%	4.1%
Domestics	\$400	\$326	23.0%	3.0%
Food/Beverages	\$500	\$472	6.1%	3.8%
Footwear	\$302	\$300	0.5%	2.3%
Furniture/Home Furnishings	\$365	\$294	24.0%	2.8%
Gifts/Novelties	\$286	\$318	-10.0%	2.2%
HBA	\$708	\$593	19.5%	5.4%
Housewares	\$246	\$227	8.0%	1.9%
Infant Products	\$393	\$378	4.0%	3.0%
Publishing	\$868	\$815	6.5%	6.6%
Sporting Goods	\$207	\$202	2.4%	1.6%
Stationery/Paper	\$500	\$483	3.5%	3.8%
Toys/Games	\$3,832	\$4,165	-8.0%	29.0%
Video Games/Software	\$919	\$892	3.0%	7.0%
Other	\$503	\$421	19.5%	3.8%
Total	\$13,215	\$12,785	3.4%	100.0%

Note: Numbers may not add up exactly due to rounding.

SOURCE: THE LICENSING LETTER

RETAIL SALES OF LICENSED MERCHANDISE BASED ON ENTERTAINMENT/CHARACTER PROPERTIES, WORLDWIDE, 2017



SOURCE: THE LICENSING LETTER

Although sales fell by 8% in 2017, toys/games remains the largest product category in entertainment/character at 29% share. Notably, it was the only category to decline in entertainment/character.

Overall retail sales of licensed toys/games contracted 4.4% in 2017, with losses driven primarily by entertainment/character—corporate trademark/brand-, fashion-, and sports-based brands recorded flat to slight growth in 2017.

The general U.S. toy market is expected to remain flat at 0-1% growth in 2017, according to the NPD Group. In 2018, TLL anticipates growth to come from toyco-owned brands, in particular collectibles lines like Shopkins, which are expected to launch their own licensed extensions this year.

Another bright spot for entertainment/character brands is the health & beauty space, where sales grew 19.5%—or \$116 million—to reach almost \$708 million in 2017. Most new growth comes from girl-oriented brands like My Little Pony extending into makeup for tweens and adults. Surprisingly, some younger (unisex) brands are also seeing growth in the vitamin and supplement space as part of a broader health trend driving food/beverage growth.

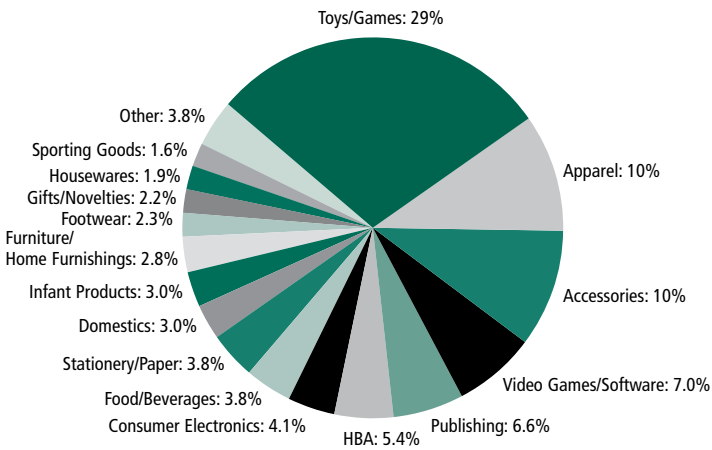
With 6.1% growth in 2017, food/beverage sales are expected to flatten somewhat both as the health foods market matures and some brands step back from an incredibly competitive space.

Healthy kid's products like juice boxes, cereal, gummy snacks, and snack bars are the most common medium on which entertainment/character brands appear, but everything from fresh fruit to frozen dinners to cake mixes is being actively licensed.

Continued on page 4

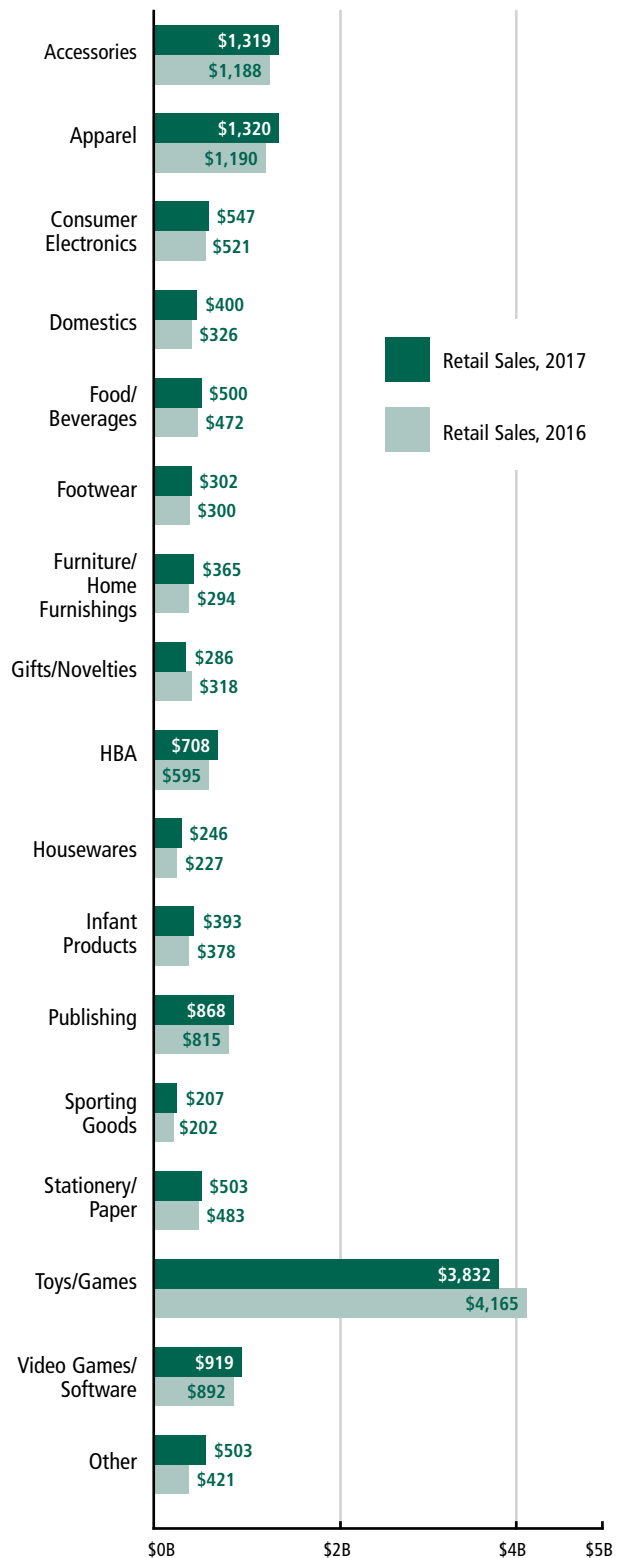
Continued from page 3

SHARE OF RETAIL SALES OF LICENSED ENTERTAINMENT & CHARACTER MERCHANDISE, BY PRODUCT CATEGORY, U.S. & CANADA, 2016–2017



SOURCE: THE LICENSING LETTER

RETAIL SALES OF LICENSED ENTERTAINMENT & CHARACTER MERCHANDISE, BY PRODUCT CATEGORY, U.S. & CANADA, 2016–2017 (Figures in Millions)



SOURCE: THE LICENSING LETTER

NEWLY UPDATED

Royalty Trends Report

\$379.00

ORDER TODAY FOR:

The average royalty across all property types and product categories

The highest royalty earning and paying properties

Licensing agreement guarantee ranges

Average contract lengths by property and product category

Create competitive agreements and graphs from the world's leader in licensing data.

- Back up your negotiations with charts, tables and graphs
- Use 10-year trendlines to formulate fair intellectual property licensing agreements
- Create realistic proposals with royalty rates broken out for 16 key product categories and 9 subcategories

ORDER YOURS TODAY!

Call: 888-729-2315

Licensing News

Properties Available Or Recently Assigned, U.S.

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
Downton Abbey (film)	Film based on the TV series follows the lives of the Crawley family and the servants who work for them in the turn of 20th century England.	All	Carole Postal, Spotlight Licensing & Brand Management

Licenses Recently Granted, U.S.

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY	
Alexa Hampton	Theodore Alexander	Home furnishings	Mark Hampton LLC/Alexa Hampton Inc.	
Avengers (The, U.K. TV series)	Art & Hue	Greeting cards	StudioCanal	
Betty Boop	Mad Engine	Apparel	King Features Syndicate	
Bob Ross	3D Retro	Talking plush	Firefly Brand Management	
	Aquarius Entertainment Merchandising	Mugs, novelties, stickers, tins		
	Roosevelts (The, RSVLTS)	Button-down shirts, swimwear		
	Savvy Sox	Air fresheners, socks		
Cats of 1986	Acco Brands	Calendars	Dimensional Branding Group (DBG)	
	DC Comics	Cryptozoic Entertainment		Card games
	Evel Knievel	LuLaRoe		Apparel
	Firefly	BOOM! Entertainment/BOOM! Studios, Inc.		Comics, graphic novels
Galaxian	My Arcade	Table-top arcade machines	Bandai Namco Games America	
Handmaid's Tale (The)	Lot18	Wine	Hulu	
Hang Ten	KAS Rugs	Rugs	Jewel Branding & Licensing	
Hello Kitty	Torrid	Plus size apparel	Sanrio	
I'M 1 (Ireland Men One)	Gravocore	Fitness equipment & accessories	Level Brands	
Intellivision	Active Brand Commerce	Posters	Licensing Works!	
John Wayne	Acco Brands	Calendars	Dimensional Branding Group (DBG)	
	Heritage Collectibles	Limited edition knives		
Kong: Skull Island	Mezco Toyz	Collectible figures, plush		
Luke Cage	Carhartt	Hooded sweatshirts	Disney Consumer Products	
MasterChef	Lot18	Wine	Endemol Shine North America	
Miraculous: Tales of Ladybug & Cat Noir	Bioworld Merchandising	Accessories (juniors'), sleepwear (juniors'), underwear	Zag America	
	Changes	Sweatshirts, t-shirts, tank tops		
	Great Eastern Entertainment	Buttons, fabric posters, key chains, wristbands		
	Sunstaches/H2W	Novelty sunglasses		
Nella the Princess Knight	Target	Accessories, apparel, home decor, toys	Nickelodeon & Viacom Consumer Products (NVCP)	
Nikki Chu	Artissimo Designs	Wall art	Jewel Branding & Licensing	
	Zingz & Thingz	Home decor		
Ninja	PSD Underwear	Underwear	Luminosity Gaming	
Pac-Man	My Arcade	Portable gaming devices	Bandai Namco Games America	
pocket.watch	Beverly Hills Teddy Bear	Toys	pocket.watch	
	Bonkers Toys	Toys		

*Extension or renewal.

Continued on page 6

Licensing News *Continued from page 5***Licenses Recently Granted, U.S.**

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
pocket.watch	H.I.S. Intl.	T-shirts (children's)	pocket.watch
	Orb Factory (The)	Activity sets, craft kits, toys	
Rick & Morty	Sunstaches/H2W	Novelty sunglasses	Cartoon Network Enterprises
Romero Britto	Lamps Plus	Lighting	Level Brands
Scott Living	Coaster Company of America	Furniture	Scott Living/Scott Brothers Global
	Karastan div. Mohawk Flooring	Rugs	
Skee-Ball	Buffalo Games	Wooden tabletop games	Dimensional Branding Group (DBG)
	Super Impulse USA div. Topcat Worldwide	Electronic toys	
Stacy Garcia	SG Footwear div. SG Companies	Footwear (adults')	Stacy Garcia
Steven Alan	JACHS	Apparel	Steven Alan
Tarzan	Active Brand Commerce	Posters, t-shirts	Licensing Works!
Transformers	Wizards of the Coast	Trading card games	Hasbro
Universal Monsters	Saucony	Limited edition footwear	Universal Brand Development
	Super7	Collectible figures, pennants, prints	
Yellow Submarine	Vandor Products	Collectibles	Bravado Intl. Group div. Universal Music Group
Zorro	Active Brand Commerce	Posters, t-shirts	Licensing Works!

International Properties Available or Recently Assigned

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
44 Cats	Animated series about cats who act normally when they are around people, but act just like humans when they are on their own.	All excl. master toy (LATAM)	Flavio Medeiros, Discovery Consumer Products (Latin America)
Arty Mouse	Children's brand stars a small character who is big on creativity, encouraging children to express what they see in the world around them.	All (Mexico)	Jaime Hofman, Exim Licensing (Mexico)
Bill & Ted's Bogus Journey	Film franchise features our favorite teens on another fantastical adventure when a villain from the future sends evil robot duplicates to terminate and replace them.	All (U.K., Europe)	Max Arguile, Reemsborko
Bill & Ted's Excellent Adventure	Film franchise featuring two seemingly dumb teens struggle to prepare a historical presentation with the help of a time machine.		
Boobooto	Edutainment brand tells the story of brothers and sisters learning about the world through their experiences in the inner part of the forest.	All (Worldwide)	Cynthia Chu, Skynet (Shanghai) Brand Management Co., Ltd.
Cuphead	Classic, rapid-fire-action video game heavily focused on boss battles. Inspired by cartoons of the 1930s, visuals and audio are created with the same techniques of the era.	All (U.K., Ireland)	John McInerny, Allsorts Licensing
		All (Belgium, Netherlands, Luxembourg)	David Speijer, BN Licensing B.V.
		All (Italy)	Maria Grazia Bussandri, Premium S.r.l./ Premium Licensing
		All (Japan)	David Buckley, Copyrights Asia Ltd.
David Walliams	Children's author with global sales exceeding 25 MM copies in 53 languages. Titles include Gangsta Granny, Mr Stink, and The Boy In The Dress.	All (U.K.)	Victoria Whellans, CPLG (U.K.)
Delicioso	Food content brand lets people connect and share their culture, love, and passion for food on social, digital, and TV platforms. Engages with millions of U.S. Hispanics.	Appliances, drinkware, food & beverage, kitchenware & cookware, textiles (U.S. incl. Puerto Rico)	Amy Pagels, ALP Consulting Inc.
Jerry Leigh	Design, manufacturing, and brand management firm known for kids, juniors, and young men's licensed apparel as well as private label programs.	All (Worldwide)	Melissa Moskowitz, Richmond Management Group (RMG)
Kidpoets	Children's lifestyle and apparel brand bringing extra fun to your little one; unique, playful and what dreams are made of.	All (Worldwide)	Beth Royall-Gordon, G Studios
Lauren Toyota	Social media influencer featuring vegan recipes and lifestyle tips, with over 30 MM views and 1.2 MM followers.	Food (U.S., Canada)	Heather Rosenthal, Brand Squared Licensing

*Extension or renewal.

Continued on page 7

Licensing News *Continued from page 6*

International Properties Available or Recently Assigned

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
London Taxi Company	Globally recognized Black Cab, the taxi of choice in London and now with electrical models created for environmentally friendly travel.	Games, toys, video games (Worldwide)	Rob Corney, Bulldog Licensing
Lottie Dottie Chicken	Brazilian children's digital series circa 2006 with more than 20.4 MM subscribers across 10 language channels and 420 MM monthly views.	All (English-speaking Worldwide)	Michael Carroll, Wildbrain Entertainment div. DHX Brands
Love is...	Iconic '70s comic strip features lovable boy and girl characters. Originated from a series of love notes from the cartoonist to her future husband.	All (North America)	Cynthia Modders, Firefly Brand Management
Lucky Monkey	Cartoon brand centered around the plush monkey that brings good fortune and luck on any adventure.	All (Worldwide)	Cynthia Chu, Skynet (Shanghai) Brand Management Co., Ltd.
Margaritaville	Lifestyle brand inspired by the lyrics and lifestyle of singer, songwriter, and author Jimmy Buffett. Celebrates the casual island life state of mind.	Beverages, food (North America)	Andrew Menceles, JAM Brands
Nikki Chu	Interior designer, trend setter, and TV personality known for using neutral tones and creating personalized, comfortable spaces with global appeal.	All (Worldwide)	Ilana Wilensky, Jewel Branding & Licensing
Odd Squad	Live action comedy series about a government agency run by kids in suits equipped with the world's most advanced and unpredictable gadgetry.	Apparel, DVDs, household items, novelties, toys & games (U.K., Europe)	Andrew Maconie, Licensing Management Intl. (LMI)
PGA of America	Founded in 1916, the Professional Golfers' Association of America has been the driving force in broadening global interest and participation in the game of golf.	Accessories, apparel, golf accessories, toys & games (Austria, Belgium, Denmark, Finland, France, Germany, Greece, Italy, Luxembourg, Netherlands, Portugal, Spain, Sweden)	Andrew Maconie, Licensing Management Intl. (LMI)
Ring Warriors	Weekly national TV series launching August 2018 on WGN America set to reach 80 MM households. Stars the world's superstars of wrestling.	All (Worldwide)	Andrew Maconie, Licensing Management Intl. (LMI)
Sesame Street	Fifty-year-old children's educational series combines live action, sketch comedy, animation, and puppetry.	All (U.K., Eire)	Vicky Hill, Bulldog Licensing
		All (Benelux)	Monique Beck, J&M Brands
Simon's Cat	Animated comedy features the mischievous antics of a charming cat and his long suffering owner Simon.	All (China)	Ken Shen, Block 12 Culture/Beijing Twelve Cultural Communication Co., Ltd.
Sunny Bunnies	Animated series without dialogue follows five fluffy balls of light that can appear anywhere there is a light source.	All (North America)	Travis Rutherford, Evolution USA
		All (LATAM)	Alexandre Volpi, Vertical Licensing
Super Geek Heroes	Animation focuses on health, literacy, numeracy, creative arts, and social-emotional development.	All (Turkey, Northern Cyprus)	Neslihan Guven Colak, Animation Intl. Ltd. (Turkey)
Tasty	World's largest social food network reaches nearly 540 MM people worldwide through social media, Tasty.co, a mobile app, and physical cookbooks.	All (EMEA)	Monika Eby, Licensing Matters Global
		All (ANZ)	Thomas Punch, Haven
		All (Spanish-speaking LATAM)	Ximena Duque, Lotus Global Marketing SAS (LATAM)
		All (Brazil)	Glenn Migliaccio, Lotus Global Marketing (Brazil)
Teddy Bear Collection	Cartoon brand featuring Teddy, the star of a London toy store who is curious about everything outside the window, and his friend Angel.	All (Worldwide)	Cynthia Chu, Skynet (Shanghai) Brand Management Co., Ltd.
TKO: Total Knock Out	Competition series hosted by Kevin Hart, where one player races through obstacles while other contestants attempt to knock them out.	All (U.S., Canada)	Ross Misher, Brand Central

International Licenses Recently Granted

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Abraham Hunter	Imagimex	Greeting cards (U.S., Canada)	MHS Licensing + Consulting
	Laural Home	Bath mats, shower curtains (U.S., Canada)	
Al Agnew	Andrews + Blaine	Jigsaw puzzles (Worldwide)	
	Artisans Apparel	Apparel (U.S., Canada)	
Amylee Weeks	Pictura	Greeting cards (U.S., Canada)	

*Extension or renewal.

Continued on page 8

International Licenses Recently Granted

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Archie	Bare Tree Media	Digital apps, digital stickers (Worldwide)	King Features Syndicate
	JCorp	Apparel, sleepwear (men's), swimwear (men's) (Canada)	
Ariana Grande	Luxe Brands	Fragrance (U.S., Canada)	Bravado Intl. Group div. Universal Music Group
Audrey Jeanne Roberts	Gina B. Designs	Greeting cards (Worldwide)	MHS Licensing + Consulting
Betty Boop	Aromatic Art LLC	Air fresheners, auto fragrance (Russia)	King Features Syndicate
	Soymilk Co. Ltd.	Bandanas, hooded sweatshirts, stickers, t-shirts, tote bags, towels (Japan)	
	Sunny Days Entertainment	Bendable figures (U.S., Canada)	
Beyblade	Accessories Trade Mark (ATM)	Backpacks (France)	Corus Entertainment/Nelvana Enterprises
	Leomil NV	Footwear (France)	
	Sun City	Bedding (France)	
British Museum (The)	Xiaomi Inc.	Mobile phones (China)	Alfilo Brands
Chinese Laundry	SG Footwear div. SG Companies*	Footwear (adults') (U.S., Canada, Puerto Rico)	CELS Enterprises Inc.
Chupa Chups	Foamous/Swis&senS SA	Fragrance (France, Mexico, Brazil, Spain)	Perfetti Van Melle (PVM)/PVM Licensing
Corbert Gauthier	Manual Woodworkers & Weavers (MWW)	Woven wall decor (U.S., Canada)	MHS Licensing + Consulting
Cuphead	Marketing Instincts - Controller Gear	Charging stands, controller stands, controllers, skins (U.S., Canada)	King Features Syndicate
Darrell Bush	Gerson Co.	Ceramic containers (U.S., Canada)	MHS Licensing + Consulting
	Signature Brands	Tins (U.S., Canada)	
David Walliams	Cooneen	Nightwear (U.K.)	CPLG (U.K.)
	Danilo Promotions Ltd.	Greeting cards (U.K.)	
David Walliams	Lagoon Group	Card games (U.K.)	CPLG (U.K.)
	Paul Lamond Games	Puzzles (U.K.)	
	Smiffy's	Dress-up (U.K.)	
Despicable Me franchise	SG Footwear div. SG Companies*	Footwear (U.S., Canada, Central America)	Universal Brand Development
Draper James	Altair Eyewear	Eyewear (Worldwide)	Draper James
Feisty Pets	American Marketing Enterprises (AME)/ Briefly Stated, Inc. (BSI), subsidiaries of Global Brands Group USA (GBG)	Sleepwear, underwear (North America)	Surge Licensing
	Franco Manufacturing/Franco MFG	Bath products, beach products, bedding, kitchen (North America)	
	Global Brands Group Bath & Beauty Div. (GBG)	Beauty products, personal care (North America)	
Flash Gordon	BIG Chief Studios Ltd.	Busts, figures (Worldwide)	King Features Syndicate
	Cend Intl. Ltd. div. The Hut Group	Cases, hoodies, mugs, posters, t-shirts (Worldwide)	
	Koch International GmbH/Hannibal Verlag	Books (GAS)	
Flower Fairies	Childrensalon	Loungewear (children's) (U.K.)	Penguin Ventures/Penguin Random House
Gina Linn	Custom Decor	Flags, garden decor, mailbox covers, outdoor decor (North America incl. Puerto Rico)	MHS Licensing + Consulting
	Gina B. Designs	Greeting cards (Worldwide)	
	Imagimex	Greeting cards (U.S., Canada)	
	Studio M by Magnet Works	Decorative flags, floor mats (Worldwide)	
	Wild Wings	Headwear (U.S., Canada)	
Groovy Chic	TDP Textiles	Apparel (U.K.)	DRi Licensing Ltd.
	TruffleShuffle.com	T-shirts (U.K.)	

*Extension or renewal.

Continued on page 9

Licensing News *Continued from page 8*

International Licenses Recently Granted

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Gruffalo (The)	Star Editions	Giftware & collectibles, personalized items (Worldwide)	Magic Light Pictures
Harry Potter	Carat Shop (The)	Jewelry (U.K.)	Warner Bros. Consumer Products
Hautman Brothers	Mountain Corp. (The)	Apparel, tote bags (Sweden)	MHS Licensing + Consulting
Highway Rat (The)	Star Editions	Giftware & collectibles, personalized items (Worldwide)	Magic Light Pictures
How to Train Your Dragon 3	SG Footwear div. SG Companies	Footwear (U.S., Canada, Central America)	Universal Brand Development
International Space Archives	Crux Corp. div. Kamio Japan Inc.	Bags, wallets (Japan)	Licensing Management Intl. (LMI)
	Kids Connect Fashion B.V.	Apparel (Benelux)	
	Mistiarn Pty Ltd. tda Mitch Dowd Design	Apparel (men's), sleepwear, underwear (ANZ)	
	VMC Accessories	Accessories, headwear (U.K., Eire)	
Jim Killen	Westminster Collection (The) div. 288 Group Ltd.	Collector medals (U.K., Eire)	
	Artisans Apparel	Apparel (U.S., Canada)	MHS Licensing + Consulting
Kim Norlien	Birchwood Trading	Throws (U.S., Canada)	
	Gerson Co.	Ceramic containers (U.S., Canada)	
L.O.L. Surprise!	Imagimex	Greeting cards (U.S., Canada)	
	SG Footwear div. SG Companies	Footwear (girls') (U.S., Canada, Puerto Rica)	MGA Entertainment
Laura Lee	DIFF Eyewear	Sunglasses (Worldwide)	Digital Brand Architects
LEGO Jurassic World	SGL Apparel div. SG Companies	Sleepwear (children's) (U.S., Canada, Mexico)	LEGO Systems
Lisa Jane Smith	Stupell Industries	Wall decor (U.S., Canada)	MHS Licensing + Consulting
	Thirstystone Resources	Dolomite coasters (U.S., Canada)	
London Taxi Company	Bioworld Merchandising	Accessories, apparel (North America, U.K.)	Bulldog Licensing
	High Resolution Design Ltd. (HRD)	Plush (U.K.)	
	IglooBooks div. Bonnier U.K.	Publishing (U.K.)	
	Infinity Brands t/a Keep Calm And Carry On Beverage Company Ltd.	Gift tins (food) (U.K.)	
Masha and the Bear	Oxford Diecast Ltd.	Die-cast vehicles (U.K.)	
	Viber Media S.à r.l.	Digital stickers (Worldwide)	Masha and The Bear Ltd./ Animaccord Animation Studio
Miraculous: Tales of Ladybug & Cat Noir	Funko	Pop vinyl figures (Worldwide excl. China, Korea, Japan)	Zag America
	Mighty Fine	Accessories, apparel (U.S., Canada)	
Miraculous: Tales of Ladybug & Cat Noir	Pez Candy	Candy dispensers (Worldwide excl. U.S., Canada)	Zag America
	Rubie's Costume	Costumes (U.S., Canada, U.K.)	
	Spencer Gifts/Spirit Halloween	Costume accessories, costumes (U.S., Canada)	
	Stor USA	Drinkware (U.S., Canada)	
Monopoly	Olympia Le-Tan (OLT Paris)	Hand bags (Worldwide)	Hasbro
Nintendo	SG Footwear div. SG Companies	Footwear (children's) (U.S., Canada, Mexico)	Nintendo of America
Nitro Circus	Ripley Entertainment	Publishing (Worldwide)	Nitro Circus
Paddington Bear	Royal Mint (The)	Coins (U.K.)	Copyrights Group (The)
Peter Rabbit	Childrensalon	Loungewear (children's) (U.K.)	Penguin Ventures/Penguin Random House
PGA Tour	HB Studios Multimedia Ltd.	Video games (Worldwide)	PGA TOUR
Pokémon	Funko	Pop vinyl figures (U.S., Canada, U.K.)	Pokémon Company Intl.
Popeye	Aromatic Art LLC	Air fresheners, auto fragrance (Russia)	King Features Syndicate
	Artovision	Art prints, desktop art, postcards, shadowbox art (U.S., Worldwide online)	

*Extension or renewal.

Continued on page 10

International Licenses Recently Granted

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Popeye	Brasterapica Industria Farmaceutica	Vitamins (Brazil)	King Features Syndicate
	GameFood Co.	Protein bars, protein shakes, vitamins (CIS)	
	Giordano Ltd.	Apparel, caps, tote bags (Hong Kong, Macau, China, Taiwan)	
	Ripple Junction	Accessories, apparel, mobile phone accessories, on-demand merchandise (U.S., Canada)	
	Sunny Days Entertainment	Bendable figures (U.S., Canada)	
Powerpuff Girls (The)	Sabrina Pilewicz	Handbags (EMEA)	Cartoon Network Enterprises EMEA
Ripley's Believe It or Not!	Nitro Circus	Digital content (Worldwide)	Ripley Entertainment
Robin Roderick	Birchwood Trading	Blankets (infants') (U.S., Canada)	MHS Licensing + Consulting
	Imagimex	Greeting cards (U.S., Canada)	
Robot Trains	Bizak, S.A.	Toys (Spain)	Mondo TV S.p.a.
	Comansi	3D figurines (Spain)	
		Back-to-school (Portugal)	
	Concentra Produtos Para Crianças S.A.	Toys (Portugal)	
	Grabo Intl. Srl	Balloons (Italy, Russia)	
	Kstationery, Design e Produção Gráfica Lda.	Back-to-school (Portugal)	
	Panini Group S.p.A.	Sticker albums (Spain)	
Robozuna	Hengxin Shambala Culture Co., Ltd. (HSK)	Master toy (China)	ITV Studios Global Entertainment - Kids Division
Room on the Broom	Star Editions	Giftware & collectibles, personalized items (Worldwide)	Magic Light Pictures
Royal Horticultural Society	Posh Shed Co. (The)	Accessories, back door stores, garden products, sheds (U.K.)	Royal Horticultural Society/RHS Enterprises Ltd.
Rubik's	McDonald's	Promotional toys (North America, EMEA, Scandinavia)	Smiley Company (The)/ SmileyWorld
Secret Life of Pets 2 (The)	SG Footwear div. SG Companies	Footwear (U.S., Canada, Central America)	Universal Brand Development
Sex Pistols	Midnight Studios	Apparel (U.S., U.K.)	Bravado Intl. Group div. Universal Music Group
	Selfridges & Co. Ltd.	Sweatshirts, t-shirts (U.K.)	
Slush Puppie	Manchester Drinks Co. Ltd.	Pre-mixed beverages (U.K.)	Pink Key Consulting
Smiley	Ultra Toys & Gifts Pvt Ltd.	Accessories, gifts & collectibles, toys (India)	Smiley Company (The)/ SmileyWorld
Splashlings	Play Visions	Glow-in-the-dark toys (North America)	Shaftesbury/Smokebomb Entertainment
Stephanie Ryan	Split P	Ceramic dinnerware, napkins, placemats, runners (U.S., Canada)	MHS Licensing + Consulting
Stick Man	Star Editions	Giftware & collectibles, personalized items (Worldwide)	Magic Light Pictures
Stranger Things	Dark Horse Comics	Comics, graphic novels (Worldwide)	Netflix
Sunny Bunnies	Funrise Toys	Master toy (North America, ANZ)	Media I.M.
Swizzels	Beams International Ltd.	Food gift collections (U.K.)	Blonde Sheep Licensing
Swizzels Matlow	Sambro Intl.	Backpacks, bags, kitchen storage, melamine, purses, toys (U.K.)	
Ted Baker	Delta Galil	Loungewear, pajamas, thermals, underwear (men's) (Worldwide)	Ted Baker London
Terry Doughty	Artisans Apparel	Apparel (U.S., Canada)	MHS Licensing + Consulting
Tod's	Marcolin*	Eyewear (Worldwide)	Tod's SpA
Treasure X	Smyths Toys Superstores	Collectibles (U.K., Ireland)	Moose Toys
Tupac Shakur	Trapstar	Apparel (U.K.)	Bravado Intl. Group div. Universal Music Group

*Extension or renewal.

Continued on page 11

International Licenses Recently Granted

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Twinkie	Funko	Pop vinyl figures (U.S., Canada)	Hostess Brands
UglyDolls	SG Footwear div. SG Companies	Footwear (children's) (U.S., Canada)	STX Entertainment
Victoria & Albert Museum	People Tree Ltd.	Apparel (U.K.)	V&A (Victoria & Albert Museum)
Warhammer 40K	Hasbro	Board games (Worldwide)	Games Workshop Group Plc
Who (The)	Scomadi Worldwide Ltd.	Scooters (Worldwide)	Bravado Intl. Group div. Universal Music Group
World of Eric Carle (The)	Little Goodall	Apparel (children's) (U.S., Canada, U.K., France, Asia)	Joester Loria Group (JLG)
Yellow Submarine	Winning Moves U.K. Ltd.	Board games (Monopoly) (U.K.)	Caroline Mickler



contacts & connections

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

20th Century Fox Consumer Products, Tim Erickson, SVP Global Licensing & Operations, 310-369-1000, tim.erickson@fox.com, P. 5.

3D Retro, Ben Goretsky, Owner, 818-630-7063, ben.goretsky@3dretro.com, P. 5.

Acco Brands, Jill Broering, Senior Director Product Marketing, 937-495-6323, jill.broering@acco.com, P. 5.

Active Brand Commerce, Stephanie Gonzalez, Director Licensing, 747-226-5212, stephg@activebrandcommerce.com, P. 5-6.

ALP Consulting Inc., Amy Pagels, President, amy@alpconsultinginc.com, P. 6.

Altair Eyewear, 800-505-5557, altaircs@vsp.com, P. 8.

American Marketing Enterprises (AME)/Briefly Stated, Inc. (BSI), subsidiaries of Global Brands Group USA (GBG), Jennifer Nitz, Senior Director Licensing, 646-839-7000, jennifernitz@ameny.com, P. 8.

Andrews + Blaine, Brandie Oliver, Public Relations & Licensing Manager, 850-368-3604, brandie@andrewsblaine.com, P. 7.

Aquarius Entertainment Merchandising, Linda Judy, VP Licensing & Business Development, 559-561-4577, linda@aquariusimages.com, P. 5.

Artisans Apparel, Charlie O'Mahoney, President & COO, 800-657-4766, comahoney@artisansinc.com, P. 7-9.

Artissimo Designs, John Ling, CEO, 310-802-7900, mmann@artissimodesigns.com, P. 5.

Artovision, Stuart Sandler, Owner, 715-514-0401, stuart@artovision.com, P. 9.

Bandai Namco Games America, Karim Farghaly, Director Business Development, 408-235-2000, kfarghaly@namcobandaigames.com, P. 5.

Bare Tree Media, Robert Ferrari, CEO, 617-899-3347, rferrari@baretreemedia.com, P. 7.

Beverly Hills Teddy Bear, David Socha, CEO, 661-257-0750, david@bhteddybear.com, P. 5.

Bioworld Merchandising, Jennifer Staley, VP Licensing, 972-488-0655, jennifers@bioworldmerch.com, P. 5,8.

Birchwood Trading, Brittany Hook, 888-959-4502, bhook@birchwoodtrading.net, P. 8-9.

Bonkers Toys, Brian Bonnett, CEO, 858-692-3287, hello@bonkerstoys.com, P. 5.

BOOM! Entertainment/BOOM! Studios, Inc., Lance Kreiter, VP Licensing & Merchandising, 323-617-4124, lkreiter@boom-studios.com, P. 5.

Brand Central, Ross Misher, CEO, 310-268-1231, ross@brandcentralgroup.com, P. 7.

Brand Squared Licensing, Heather Rosenthal, Partner, 917-748-8836, hsrosenthal@bsquaredlicensing.com, P. 6.

Bravado Intl. Group div. Universal Music Group, Joe Marziotto, VP Brand Marketing The Beatles, 212-445-3432, joe.marziotto@bravado.com, P. 6.

Bravado Intl. Group div. Universal Music Group, Mat Vlastic, CEO Bravado, 212-445-3400, mat.vlastic@umusic.com, P. 7.

Buffalo Games, Ben Jamesson, VP Sales, Marketing & Product Development, 716-827-8393, bjamesson@buffalogames.com, P. 6.

Carhartt, Tony Ambroza, Chief Brand Officer & SVP Marketing, 313-271-8460, tambroza@carhartt.com, P. 5.

Cartoon Network Enterprises, Peter Yoder, VP Cartoon Network Enterprises, 212-275-6535, peter.yoder@turner.com, P. 5.

CELS Enterprises Inc., Leah Formiconi, VP, 310-838-0280, lformiconi@chineselaundry.com, P. 7.

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

Continued on page 12

contacts & connections *Continued from page 11*

Coaster Company of America, 877-221-9666, info@coastercompany.com, P. 5.

Cryptozoic Entertainment, Jamie Kiskis, VP Marketing & Product Development, 949-385-6000, jamie.kiskis@cryptozoic.com, P. 5.

Custom Decor, Alison Pearson, EVP, 302-735-7600, alisonp@customdecornet.com, P. 8.

Dark Horse Comics, Kari Torson, Director Intl. Licensing, 503-652-8815, karit@darkhorse.com, P. 9.

Delta Galil, Isaac Dabah, CEO, 212-481-3550, isaac.dabah@deltagalil.com, P. 9.

DIFF Eyewear, Nicole Cutright, Merchandising & Brand Partnerships, 310-354-5929, nicole@diffeyewear.com, P. 8.

Digital Brand Architects, Reesa Lake, EVP Brand Partnerships, 323-602-0856, reesa@thedigitalbrandarchitects.com, P. 8.

Dimensional Branding Group (DBG), John Leonhardt, President, 415-310-6135, john@dimensionalbranding.com, P. 5-6.

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

Draper James, Taylor Rettig, Interim CEO, 844-357-8953, info@draperjames.com, P. 8.

Endemol Shine North America, Thomas Ferguson, VP Licensing Partnerships, 747-529-8150, thomas.ferguson@endemolshine.us, P. 5.

Evolution USA, Travis Rutherford, President Licensing & Retail, 818-501-3186, travis@evomgt.com, P. 7.

Firefly Brand Management, Cynthia Modders, President & CEO, 415-513-5826, cynthia@fireflybrandmanagement.com, P. 5-6.

Franco Manufacturing/Franco MFG, Stacey Sobin, VP Licensing, 732-494-0500, stacey.sobin@franco-mfg.com, P. 8.

Funko, Brian Mariotti, President & CEO, 425-783-3616, brian@funko.com, P. 9.

Funko, Lauren Winarski, Senior Licensing & Brand Manager, 425-783-3616 x173, lauren@funko.com, P. 8,10.

Funrise Toys, Randy Shoemaker, SVP Global Brand Marketing & Licensing, 818-989-6570, randyshoemaker@funrise.com, P. 7,9.

G Studios, Beth Royall-Gordon, President, 949-697-8006, beth@gstudiosllc.com, P. 6.

Gerson Co., Nancy Denny, Product Designer, 913-535-7569, ndenny@gersoncompany.com, P. 7-8.

Gina B. Designs, Gina Bugee, Founder & President, 763-559-7595, gina@ginabdesigns.com, P. 7-8.

Global Brands Group Bath & Beauty Div. (GBG), Amy Alperin, Senior Licensing Manager - GBG Beauty, 646-786-2344, kelleydavisonglobalbrandsgroup.com, P. 8.

Gravocore, Gorgi Nikkaran, Founder & CEO, gorgi@gravocore.com, P. 5.

Great Eastern Entertainment, Kent Hsu, Owner, 310-638-5058, kent@geanimation.com, P. 5.

H.I.S. Intl., Steve Rahmey, President, 212-967-3990 x6680, srahmey@nokidding-his.com, P. 5.

Hasbro, Eddy Baptista, Global Brand Licensing/Publishing & Product Development/Collaborations, 401-280-2115, eder.baptista@hasbro.com, P. 10.

Hasbro, Tom Warner, SVP Franchise Transformers, 401-431-8697, twarner@hasbro.com, P. 6.

Heritage Collectibles, John Etten, CEO, 775-825-4817, jetten@hcknives.com, P. 5.

Hostess Brands, Becky Logan, Brand Director, 816-701-4752, blogan@hostessbrands.com, P. 10.

Hulu, Randy Freer, CEO, 310-571-4700, randy.freer@hulu.com, P. 5.

JACHS, Hayati Banastey, Founder, CEO & Creative Director, 212-334-4380, shop@jachsny.com, P. 6.

Jewel Branding & Licensing, Ilana Wilensky, VP, 404-698-3350, ilana@jewelbranding.com, P. 5-6.

Joester Loria Group (JLG), James Slifer, SVP Business Development, 212-683-8548, jslifer@tjlggroup.com, P. 10.

K&K Promotions, Inc, Kelly Knievel, President, kelly@evelknievel.com, P. 5.

Karastan div. Mohawk Flooring, Tracy Pruitt, VP Design, 800-234-1120, tracy_pruitt@mohawkind.com, P. 5.

KAS Rugs, Santhi Yarlalagadda, VP Business Development, New Business & Licensing, 732-545-1900, santhi@kasrugs.com, P. 5.

King Features Syndicate, Carla Silva, VP, GM & Global Head Licensing, 212-969-7582, csilva@hearst.com, P. 5,7-9.

Lamps Plus, Clark Linstone, President & CEO, 818-886-5267, clinstone@lampsplus.com, P. 5.

Laural Home, Don Tweel, President, 201-767-1880, don@lauralhome.com, P. 7.

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

Level Brands, Blake Van Leer, Consultant, 704-445-5800, contact@levelbrands.com, P. 5.

Licensing Matters Global, Monika Ebly, Licensing & Sales Manager, 312-777-6057, monika.ebly@licensingmattersglobal.com, P. 7.

Licensing Works!, Leslie Levine, Owner & Founder, 702-485-5677, leslie@licensingworks.us, P. 5-6.

Little Goodall, Molly Goodall, CEO & Creative Director, 469-617-3074, info@littlegoodall.com, P. 10.

Lot18, Craig Davis, CMO, 855-695-6818, craig@lot18.com, P. 5.

LuLaRoe, Mark Stidham, Co-founder & CEO, mark.stidham@lularoe.com, P. 5.

Luxe Brands, Joel Ronkin, CEO, 954-791-6050, jronkin@luxebands.com, P. 7.

Mad Engine, Lorne Bloch, VP Licensing, 858-558-5270, lorne@madengine.com, P. 5.

Continued on page 13

contacts & connections *Continued from page 12*

Manual Woodworkers & Weavers (MWW), Jim Clarke, VP & CFO, 828-692-7333, jimc@manualww.com, P. 7.

Marcolin, Jennifer Wright, SVP Product Development, 908-595-6200, jwright@marcolin.com, P. 9.

Mark Hampton LLC/Alexa Hampton Inc., Alexa Hampton, Owner, 212-753-4110, mail@markhampton.com, P. 5.

Marketing Instincts - Controller Gear, Kevin Machen, Senior Brand Marketing Manager - Controller Gear, 951-587-2700, hello@controllergear.com, P. 7.

McDonald's, Jennifer Lennon, Director Global Consumer Insights, 630-623-3000, jennifer.lennon@us.mcd.com, P. 9.

Mezco Toyz, Mez Markowitz, President, 718-472-5100, mez@mezco.net, P. 5.

MGA Entertainment, Diana Luna, Senior Director Intl. Licensing, 818-894-2525, dluna@mgae.com, P. 8.

MHS Licensing + Consulting, Marty Segelbaum, President, 952-544-1377 x202, marty@mhslicensing.com, P. 7-9.

Midnight Studios, info@midnight-usa.com, P. 9.

Mighty Fine, Patty Timsawat, President Licensing & COO, 213-235-4710, patty@welovefine.com, P. 8.

Mountain Corp. (The), Kenny Ballard, CEO, 603-355-3700, kballard@themountain.com, P. 8.

My Arcade, Crystal Dugan, Head Marketing, 310-222-1045, support@myarcadegaming.com, P. 5.

Netflix, Jess Richardson, Director Global Licensing, Merchandising & Promotions, 408-540-3700, jerichardson@netflix.com, P. 9.

Nickelodeon & Viacom Consumer Products (NVCP), Jose Castro, SVP Softlines, Global Fashion Collaborations & Specialty Retail, 212-846-8000, jose.castro@nick.com, P. 5.

Nintendo of America, Sandy Hatcher, Manager Licensing, 425-861-2089, cammyb@noa.nintendo.com, P. 9.

Nitro Circus, Cassie Dombrowski, Director Global Licensing, 949-429-8345, cassie@nitrocircus.com, P. 9.

Pez Candy, Christian Jegen, President & CEO, 203-795-0531, cjegen@pezcandyinc.com, P. 9.

PGA TOUR, Matt Lofredo, Senior Director Licensing & New Ventures, 904-543-5176, mattiofredo@pgatourhq.com, P. 9.

Pictura, Ramona Coughlin, SVP, 800-742-8872 x33, ramona.coughlin@picturausa.com, P. 7.

Play Visions, Mark Chernick, President & CEO, 425-482-2836 x104, markc@playvisions.com, P. 9.

pocket.watch, Hanna Sheinin, Director Global Licensing, 424-298-8234, hanna@pocket.watch, P. 5.

Pokémon Company Intl., Colin Palmer, VP Marketing & Licensing, 425-274-4800, c.palmer@pokemon.com, P. 9.

PSD Underwear, Sean Long, VP Sales, 323-685-2119, slong@psdunderwear.com, P. 5.

Richmond Management Group (RMG), Melissa Moskowitz, VP Licensing, 818-386 9454, melissa@richmondmanagement.com, P. 6.

Ripley Entertainment, Amanda Joiner, Senior Director Publishing, 407-692-8010, joiner@ripleys.com, P. 9.

Ripley Entertainment, Sabrina Sieck, Creative Content Manager, 407-345-8010 x8183, siek@ripleys.com, P. 9.

Ripple Junction, Scott Morton, Licensing Director, 513-559-3900, smorton@ripplejunction.com, P. 9.

Roosevelts (The, RSVLTS), John Tramutolo, Creative Director, john.tramutolo@rsvlts.com, P. 5.

Rubie's Costume, Felicia Palumbo, Director Licensing, 516-326-1500 x135, fpalumbo@rubies.com, P. 9.

Sanrio, Linh Forse, Licensing Director, 310-896-3277, lforse@sanrio.com, P. 5.

Saucony, Amanda Reiss, CMO, 617-824-6000, amanda.reiss@saucony.com, P. 6.

Savvy Sox, Elbert Irving, MD, 909-989-9100, info@savvysox.com, P. 5.

Scott Living/Scott Brothers Global, Stephanie Pierotti, VP Marketing, 702-858-7200, stephanie.p@scottbrothersglobal.com, P. 5.

SG Footwear/SGI Apparel div. SG Companies, Elisa Gangl, VP Licensing & Marketing, 201-342-1200, elisag@thesgcompanies.com, P. 6-10.

Signature Brands, Kathleen Piper, VP Marketing, Innovation, R&D, 612-310-6295, kathleen@projectpartnersnetwork.com, P. 7.

Spencer Gifts/Spirit Halloween, Rick Goralnick, VP Licensing, 609-645-3300, rick.goralnick@spirithalloween.com, P. 9.

Split P, Stacey Ross, 847-868-3113, sross@split-p.net, P. 9.

Spotlight Licensing & Brand Management, Carole Postal, President, 212-947-5958, carole@spotlightlicensing.com, P. 5.

Stacy Garcia, Larry Chudy, VP Licensing, 845-426-5806, licensing@stacygarcia.com, P. 6.

Steven Alan, Steven Alan, CEO, 877.978.2526, orders@stevenalan.com, P. 6.

Stor USA, Borja Urbina, VP Sales Marketing & Licensing North America, 954-864-6430, b.urbina@storline.es, P. 9.

Studio M by Magnet Works, Sue Todd, President, 800-886-3121 x227, sue.todd@studio-m.com, P. 8.

Stupell Industries, Robert Stupell, President, 401-831-5640, robert@stupellind.com, P. 8.

STX Entertainment, Philip Button, EVP Intl. Production & Management, 310-742-2300, pbutton@stxentertainment.com, P. 10.

Sunny Days Entertainment, Melvin Wells, CEO, sales@sunnydaysent.com, P. 7,9.

Sunstaches/H2W, Dan Gershon, President, 800-578-3088, dan@sunstaches.com, P. 5.

Super Impulse USA div. Topcat Worldwide, Alan Dorfman, President, 267-878-0466 x101, alan@superimpulse.com, P. 6.

Continued on page 14

contacts & connections *Continued from page 13*

Super7, Mark Morse, VP Marketing, Product & IP Development, 415-553-6155, mark@super7store.com, P. 6.

Surge Licensing, Elan Freedman, VP Business Development & Licensing, 516-939-2225, elan@surging.com, P. 8.

Target, Gaye Dean, Marketing Director, 612-696-8326, gaye.dean@target.com, P. 5.

Theodore Alexander, Neill Robinson, President, 336-885-5005, info@theodorealexander.com, P. 5.

Thirstystone Resources, Emily McGuire, Licensing & Marketing Coordinator, 940-668-6793, licensing@thirstystone.com, P. 8.

Torrid, Kate Horton, SVP & GMM, 626-839-4681, khorton@torrid.com, P. 5.

Toynk Toys/Incogneato, Steven Loney, President & CEO, 773-220-3204, steven@toynk.com, P. 5.

Universal Brand Development, Cindy Chang, SVP Consumer Products, Partnerships & Licensing, 818-777-2067, cindy.chang@nbcuni.com, P. 8-9.

Universal Brand Development, Joe Lawandus, SVP & GM Consumer Products North America, 818-777-1000, joe.lawandus@nbcuni.com, P. 6.

Vandor Products, Lynn Keller, VP Licensing, 801-952-4603, lkeller@vandorproducts.com, P. 6.

Warner Bros. Consumer Products, Maryellen Zarakas, SVP Worldwide Marketing, Franchise Management & TV/Studio Licensing, 818-954-4170, maryellen.zarakas@warnerbros.com, P. 8.

Warner Bros. Consumer Products, Pamela Lifford, President, 818-954-7980, pam.lifford@warnerbros.com, P. 5.

Westminster Collection (The) div. 288 Group Ltd., 44 333 00 32 777, enquiries@westminstercollection.com, P. 8.

Wild Wings, Sara Koller, VP, 800-445-6413, sara.koller@wildwings.com, P. 8.

Wizards of the Coast, Jerome Lalin, SVP Global Brand Strategy & Marketing, 425-226-6500, jerome.lalin@wizards.com, P. 6.

Zag America, Jennifer Toledo, Licensing Dept., 818-474-1663, jtoledo@zag-inc.com, P. 5,8-9.

Zingz & Thingz, Cory Russell, VP & MD, 888-466-5447, info@zingzinc.com, P. 5.

The Latest Licensing Industry Survey Results on Salaries, Bonuses, and Demographics at Your Fingertips!
Including territorial breakdowns for the U.S. and the EU!

TLL's new **Compensation Report 2018** gives you up-to-date survey data and historical comparisons for years 2012, 2015, and 2017 on:

- ✓ Salary & bonus by 5 titles, plus broader executive versus mid-level titles.
- ✓ Regional, age, racial, and gender demographics for both U.S. and internationally
- ✓ Percent of licensing executives who expect to receive a 2018 bonus.
- ✓ Level of education attainment and experience for licensing executives in 2017
- ✓ Average time since last increase in compensation—and amount of last compensation increase
- ✓ Number of full-time and part-time employees engaged in licensing at companies, **And More!**
- ✓ Average amount of raise received vs expectation in 2017

ORDER YOURS TODAY! Call: 888-729-2315

Or Visit: www.thelicensingletter.com/shop/licensing-industry-salary-survey



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.

Accessories Trade Mark (ATM), Cedric Chen, CEO, 33 1 84 79 18 20, cedric.chen@atm-e.com, P. 7.

Alfilo Brands, Yizan He, Co-founder & Managing Partner, 86 21 60 400 968 x804, yzh@alfilo.com, P. 7.

Allsorts Licensing, John McInnery, MD, 44 1234 212411, john@allsortsmedia.co.uk, P. 6.

Animation Intl. Ltd. (Turkey), Neslihan Guven Colak, Head Trade Turkey, CIS, MENA, 90 212 351 01 96, neslihan@ai-turkey.com, P. 7.

Aromatic Art LLC, Dmitry Porchkhidze, Owner, 7 499 517 91 84, dmitriy@aurami.ru, P. 7-9.

Art & Hue, P. 5.

Beams International Ltd., 44 1634 265 480, enquiries@beamsint.com, P. 9.

BIG Chief Studios Ltd., Tony Leetham, Head Product Development, 44 3458 055 777, tony@bigchiefstudios.co.uk, P. 8.

Bizak, S.A., 34 944 34 14 90, bizak@bizak.es, P. 9.

Block 12 Culture/Beijing Twelve Cultural Communication Co., Ltd., Ken Shen, 86 18101887036, ken@12dong.cn, P. 7.

Blonde Sheep Licensing, Natasha Dyson, MD, 44 7855 858 711, natasha@blondesheep.co.uk, P. 9.

BN Licensing B.V., David Speijer, Director, 31 887734500, david@bnlicensing.com, P. 6.

Brasterapica Industria Farmaceutica, 55 4414 7788, brasterapica@brasterapica.com.br, P. 9.

Bravado Intl. Group div. Universal Music Group, Alex Mitchell, Licensing & Partnership Manager, 44 3305 871 192, alexander.mitchell@bravado.com, P. 9-10.

Bravado Intl. Group div. Universal Music Group, David Boyne, MD, 44 330 587 1234, david.boyne@bravado.com, P. 10.

Bulldog Licensing, Rob Corney, Group MD, 44 20 8325 5455, robc@bulldog-licensing.com, P. 6,8.

Bulldog Licensing, Vicky Hill, Licensing Director, 44 20 8325 5455, vickyh@bulldog-licensing.com, P. 7.

Carat Shop (The), Anna May, MD, 44 1279 739239, anna.may@thecaratshop.co.uk, P. 8.

Caroline Mickler, Caroline Mickler, Licensing Agent & Consultant, 44 208 392 2439, caroline@carolinemicklerltd.co.uk, P. 10.

Cartoon Network Enterprises EMEA, 44 207 693 1000, contact@cartoonnetwork.co.uk, P. 9.

Cend Intl. Ltd. div. The Hut Group, 44 8450 949 889, reception@thg.com, P. 8.

Childrensalon, 44 1892 779110, hello@childrensalon.com, P. 8-9.

Comansi, 34 933 364 653, comansi@comansi.com, P. 9.

Concentra Produtos Para Crianças S.A., 351 21 940 5800, cliente@concentra.pt, P. 9.

Cooneen, 44 28 8952 1401, info@cooneen.com, P. 7.

Copyrights Asia Ltd., David Buckley, President, 81 3 3377 8300, buckley@copyrights.co.jp, P. 6.

Copyrights Group (The), 44 203 714 1181, info@copyrights.co.uk, P. 9.

Corus Entertainment/Nelvana Enterprises, Lily Yan, Head Brands, 416-479-6771, lily.yan@corusent.com, P. 7.

CPLG (U.K.), Victoria Whellans, Senior Business Development Manager, Brands, 44 20 8563 6400, victoria.whellans@cplg.com, P. 6-8.

Crux Corp. div. Kamio Japan Inc., Masahiro Kitada, CEO, 81 6 6264 8820, kitada@kamiojapan.jp, P. 8.

Danilo Promotions Ltd., Dan Grant, Licensing Director, 44 1992 702 903, dgrant@danilo.com, P. 7.

Discovery Consumer Products (Latin America), Flavio Medeiros, Director Acquisitions, 55 11 2138 9600, flavio_medeiros@discoverybrasil.com, P. 6.

DRI Licensing Ltd., Alicia Davenport, Licensing Director, 44 20 3757 2170, alicia@drilicensing.com, P. 8.

Exim Licensing (Mexico), Jaime Hofman, General Director, 52 55 5545 1413, mexico@eximmexico.com.mx, P. 6.

Foamous/Swis&senS SA, 41 79 554 22 33, contact@swisandsens.com, P. 7.

GameFood Co., Igor Stremilov, 7 922 023 49 21, 204@irontrue.ru, P. 9.

Games Workshop Group Plc, 44 11 5900 4000, licensing@gwplc.com, P. 10.

Giordano Ltd., 852 2746 4668, wws@giordano.com, P. 9.

Grabo Intl. Srl, Lamberto Fabbri, Head R&D, 39 0541 657435, ordini@graboballoons.com, P. 9.

Hasbro, Nikki Gie, Director Consumer Products, Brand Licensing, 44 208 569 1234, nikki.gie@hasbro.co.uk, P. 9.

Haven, Thomas Punch, MD, 61 2 9357 9888, tom@havenglobal.com, P. 7.

HB Studios Multimedia Ltd., Alan Bunker, CEO, 902-634-8316, alanb@hb-studios.com, P. 9.

Hengxin Shambala Culture Co., Ltd. (HSK), 86 10 88846666, office@hxgro.com, P. 9.

High Resolution Design Ltd. (HRD), 44 20 3488 1558, info@highresolutiondesign.co.uk, P. 8.

Continued on page 16

contacts & connections *Continued from page 15*

IglooBooks div. Bonnier U.K., Paul Gregory, CEO Bonnier U.K., Igloo, Autumn, Licensing, 44 1604 741 116, paul.gregory@bonnierpublishing.com, P. 8.

Imagimex, Mick Lussier, 613-932-6735, micjdl@cogeco.ca, P. 7-9.

Infinity Brands t/a Keep Calm And Carry On Beverage Company Ltd., 44 208 906 4888, info@infinitybrands.co.uk, P. 8.

ITV Studios Global Entertainment - Kids Division, Stephen Green, EVP Kids Content & Distribution, 44 20 7157 3000, stephen.green@itv.com, P. 9.

J&M Brands, Monique Beck, MD, 31 23 76 000 61, m.beck@jmbrands.nl, P. 7.

JAM Brands, Andrew Menceles, President, 416-209-5307, andrew@jam-brands.com, P. 6.

JCorp, Priscilla Pacheco, Licensing Coordinator, 514-384-3872, ppacheco@jcorp.ca, P. 7.

Kids Connect Fashion B.V., 31 43 2031995, info@kidsconnect.nl, P. 8.

Koch International GmbH/Hannibal Verlag, Robina Schutter, Marketing & Licensing, 43 5672 606 213, r.schuetter@kochmedia.com, P. 8.

Kstationery, Design e Produção Gráfica Lda., 351 226 101 621, licensing@kstationery.com, P. 9.

Lagoon Group, Alice Delmar-Morgan, Sales Manager, 44 20 8563 6520, sales@thelagoongroup.com, P. 8.

Leomil NV, 32 55 30 54 20, info@leomilgroup.com, P. 7.

Licensing Management Intl. (LMI), Andrew Maconie, CEO, 44 1425 403 430, andrew@lmiuk.com, P. 6-8.

Lotus Global Marketing (Brazil), Glenn Migliaccio, Senior Manager Brand Strategy & Planning, 55 11 3065-0400, marketing@lotusglobalmkt.com, P. 7.

Lotus Global Marketing SAS (LATAM), Ximena Duque, General Director, 571 236 5757, xduque@lotusglobalmkt.com, P. 7.

Luminosity Gaming, Steve Maida, CEO, info@luminosity.gg, P. 5.

Magic Light Pictures, Daryl Shute, Brand Director, 44 20 7631 1800, daryl@magiclightpictures.com, P. 8-9.

Manchester Drinks Co. Ltd., Richard Benjamin, Director, 44 161 763 0033, richard@manchesterdrinks.com, P. 9.

Masha and The Bear Ltd./Animaccord Animation Studio, Vladimir Gorbulya, Head Licensing & VP Animaccord, 7 495 230 01 80, v.gorbulya@animaccord.com, P. 8.

Media I.M., info@mediaiminc.com, P. 9.

Mistiyarn Pty Ltd. tda Mitch Dowd Design, Dane Totham, CEO, 61 3 9569 8800, dane@mitchdowd.com.au, P. 8.

Mondo TV S.p.a., Valentina La Macchia, Director Consumer Products & Global Licensing, 39 2 4952 6694, valentina.lamacchia@mondotvgroup.com, P. 9.

Moose Toys, Nicole Hardiman, Senior Licensing Manager, 61 3 9579 7377, nicole.hardiman@moosetoys.com, P. 10.

Olympia Le-Tan (OLT Paris), 33 1 42 36 42 92, sales@olympialetan.com, P. 9.

Orb Factory (The), Steve Kay, President, 902-477-9570, steve@orbfactory.com, P. 5.

Oxford Diecast Ltd., 44 1792 643 500, sales@oxforddiecast.co.uk, P. 8.

Panini Group S.p.A., Licia Dallolio, Licensing Manager, 39 059 382450, ldallolio@panini.it, P. 9.

Paul Lamond Games, Richard Wells, MD, 44 20 7254 0100, richardw@paul-lamond.com, P. 8.

Penguin Ventures/Penguin Random House, 44 20 7010 3083, licensing@uk.penguinigroup.com, P. 8-9.

People Tree Ltd., 44 20 7042 8900, people@peopletree.co.uk, P. 10.

Perfetti Van Melle (PVM)/PVM Licensing, Christine Cool, Intl. Brand Licensing Manager, 34 93 773 9316, christine.cool@es.pvmgrp.com, P. 7.

Pink Key Consulting, Richard Pink, Director, 44 12 7950 5455, richard@pinkkey.co.uk, P. 9.

Posh Shed Co. (The), Richard Frost, MD, 44 1544 387 101, info@theposhshedcompany.co.uk, P. 9.

Premium S.r.l./Premium Licensing, Maria Grazia Bussandri, MD, 39 0523 955024, premium@premiumlicensing.it, P. 6.

Reemborko, Max Arguile, Owner, max@reemborko.com, P. 6.

Royal Horticultural Society/RHS Enterprises Ltd., Cathy Snow, Licensing Manager, 44 20 3176 5800, licencing@rhs.org.uk, P. 9.

Royal Mint (The), Leighton John, Operations Director, 44 1443 222111, circulatingcoin@royalmint.com, P. 9.

Sabrina Pilewicz, 48 695 000 030, s@sabrinapilewicz.com, P. 9.

Sambro Intl., Nikki Samuels, Founder & Director Licensing, 44 845 873 9380, nikki@sambro.co.uk, P. 9.

Scomadi Worldwide Ltd., Frank Sanderson, Co-founder, info@scomadi.co.uk, P. 10.

Selfridges & Co. Ltd., 44 207 160 6222, customerservices@selfridges.com, P. 9.

Shaftesbury/Smokebomb Entertainment, Christina Jennings, CEO, 416-363-1411, cjennings@shaftesbury.ca, P. 9.

Skynet (Shanghai) Brand Management Co., Ltd., Cynthia Chu, New Media Promotion Manager, 86 21 5236 0010 x836, cynthia.chu@skynetasia.com, P. 6-7.

Smiffy's, Dominique Peckett, Director, 44 800 590 599, dompeckett@smiffys.com, P. 8.

Smiley Company (The)/SmileyWorld, Lori Heiss Tiplady, VP Brand Strategy, 44 20 7378 8231, lori@smiley.com, P. 9.

Smyths Toys Superstores, 353 91743698, cs@smythstoys.com, P. 10.

Continued on page 17

contacts & connections *Continued from page 16*

Soymilk Co. Ltd., 81 3 6721 6432, info@soymilk-lifestyle.com, P. 7.

Star Editions, Will Marston, CEO, 44 1449 721304, info@stareditions.com, P. 8-9.

StudioCanal, 44 20 7534 2700, info@studiocanal.co.uk, P. 5.

Sun City, 33 1 49 89 47 98, commercial@sun-city.fr, P. 7.

TDP Textiles, Dean Greasley, Director Licensing, 44 1283 550400, dean@tdptex.com, P. 8.

Ted Baker London, 44 20 7255 4800, ask.ted@tedbaker.com, P. 9.

Tod's SpA, 39 7348661, licensing@todsgroup.com, P. 9.

Trapstar, 44 20 3538 9198, support@trapstarlondon.com, P. 10.

TruffleShuffle.com, Pat Wood, MD, 44 117 982 8884, pat@trufflesuffle.co.uk, P. 8.

Ultra Toys & Gifts Pvt Ltd., Neha Bhan, MD, 9122 40190400, shop@ultragiftbox.com, P. 9.

V&A (Victoria & Albert Museum), Lauren Sizeland, Director Licensing & Business Development, 44 20 7942 2981, l.sizeland@vam.ac.uk, P. 10.

Vertical Licensing, Alexandre Volpi, CEO, contato@verticallicensing.com.br, P. 7.

Viber Media S.à r.l., support@viber.com, P. 8.

VMC Accessories, 44 1538 392500, sales@vmc.co.uk, P. 8.

Wildbrain Entertainment div. DHX Brands, Michael Carroll, Business Development Manager, 44 20 7631 3931, mcarroll@wildbrain.com, P. 6.

Winning Moves U.K. Ltd., 44 20 7262 9696, enquiries@winningmoves.co.uk, P. 10.

Xiaomi Inc., 86 10 6060 6666, service.global@xiaomi.com, P. 7.

BUSINESS**M&A: Fashion**

Differential Brands Group will acquire the majority of Hong Kong-based **Global Brands Group** Holding Ltd.'s North American licensing business for \$1.38 billion in an all-cash deal expected to close Q3 2018. The acquisition is expected to boost Differential Brands' annual revenues up to more than \$2.3 billion.

The assets at stake comprise all of GBG's North American children's apparel and accessories businesses as well as a majority of its West Coast and Canadian fashion operations. Included are licensing rights for Disney, Star Wars, Calvin Klein, Under Armour, Juicy Couture, Tommy Hilfiger, BCBG, Bebe, Joe's, Buffalo David Bitton, Frye, Michael Kors, Cole Haan, and Kenneth Cole. Prior to the deal, DBG's apparel brands included Hudson Jeans, Robert Graham, and SWIMS.

GBG's remaining businesses will comprise its footwear business, New York fashion business, European and Asian businesses, and its Global Brand Management business. In

2014, the company was spun off from sourcing and supply chain giant **Li & Fung**. GBG reported a \$877 million net loss in fiscal 2017 (ended March 31), compared to a profit of \$95 million the year prior.

An unexpected wrench is tossed into the \$437 million transaction to take **Perry Ellis** private—**Randa Accessories** makes an unsolicited bid for the company. The George Feldenkreis merger agreement is expected to close in the second half of calendar year 2018, subject to several conditions—including a shareholder vote.

The **Rockport Group**, known for its comfort-driven walking shoes and Aravon, Rockport, and Dunham brands, completes a court-approved marketing process after which it will sell substantially all of its assets to **Charlesbank**. The private equity investment company will own Rockport's global wholesale, independent and e-commerce operations as well as all of its Asia and Europe operations.



THE LATEST EXCLUSIVE Sports Licensing Report!
Join the winner's circle in the \$22.2 billion worldwide sports and collegiate licensing business.

At your fingertips you'll have:

- Key U.S. and International growth opportunities
- Team breakdowns in each league; licensees lists; media profiles, marketing strategy and sales data
- Contacts you need whether you're a seasoned sports licensing player or a rookie
- Best-selling merchandise categories separated by league
- Key manufacturers
- Exclusivity insight for the best return on your investment

Capitalize on this explosive market with a comprehensive analysis of this **\$22.2 billion** business.

ORDER YOURS TODAY & JOIN THE WINNER'S CIRCLE!

\$449 Call: **888-729-2315**

E-commerce Sales Surge

Continued from page 1

Sales via specialty outlets shrunk -10.5% in 2017 to reach \$2.7 billion or 20.5% share of all sales. Although the category remains the second-largest distribution channel, in 2017 there was a steep drop in shelf space at specialty retailers like toy, gift, stationery, and book sellers. One reason was the booming popularity of collectible toys that were not based on licensed properties; another was the diminishing reliance of these shops on licensed brands to attract shoppers.

The exception to this trend were comic book and video game shops, which relied on entertainment- and video game-based merchandise to diversify their standard offerings.

Discounters saw sales rise 8.6% to reach \$6.1 billion in entertainment/character-based retail sales in 2017 as retailers like Target, Walmart, and even Kohl's stepped up to vend more entertainment-based toys, apparel, and accessories than they had the year prior.

Department stores were the only other channel to drop in share, with sales decreasing -5% from 2016 to reach just under \$400 million in licensed retail sales. Faced with a tougher retail market, these stores by-and-large decided to shed licensed offerings in favor of their own branded merchandise.

For 2018, sales share is expected to increase for discounters, dollar, mid-tier, and of course, e-commerce.

RETAIL SALES OF LICENSED ENTERTAINMENT & CHARACTER MERCHANDISE, BY DISTRIBUTION CHANNEL, U.S. & CANADA, 2016–2017 (Figures in Millions)

DISTRIBUTION CHANNEL	RETAIL SALES, 2017	RETAIL SALES, 2016	CHANGE, 2016–2017	SHARE, 2017
Discounters	\$6,054	\$5,574	8.6%	45.8%
Specialty stores	\$2,712	\$3,030	-10.5%	20.5%
E-commerce	\$2,273	\$2,046	11.1%	17.2%
Food and drug	\$868	\$831	4.5%	6.6%
Variety, dollar and convenience	\$764	\$742	3.0%	5.8%
Department store/mid-tier	\$377	\$396	-5.0%	2.8%
TV shopping	\$104	\$102	1.5%	0.8%
Mail order	\$13	\$13	1.0%	0.1%
Other	\$52	\$51	1.0%	0.4%
Total	\$13,215	\$12,785	3.4%	100.0%

Note: Numbers may not add up exactly due to rounding.

SOURCE: THE LICENSING LETTER

Representative Retail Stores by Distribution Channel

Mass/Discount/Club/Big Box: BJ's, Costco, Kmart, Sam's, Target, 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, Walgreens

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

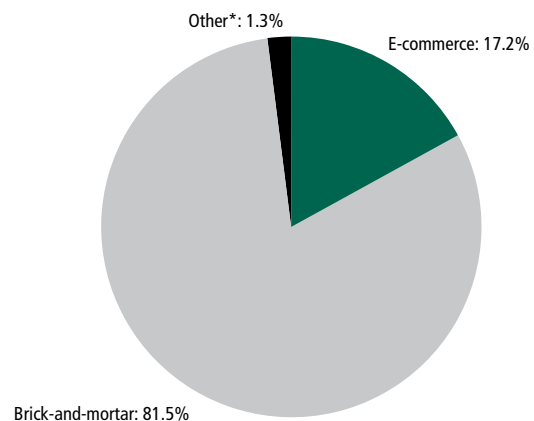
TV Shopping: HSN, QVC, ShopHQ

Mail Order: Oriental Trading, Signals

Other: Kiosks, on-site, vending, etc.

SPECIALTY AND DISCOUNT WERE THE ONLY CHANNELS TO DROP IN SHARE

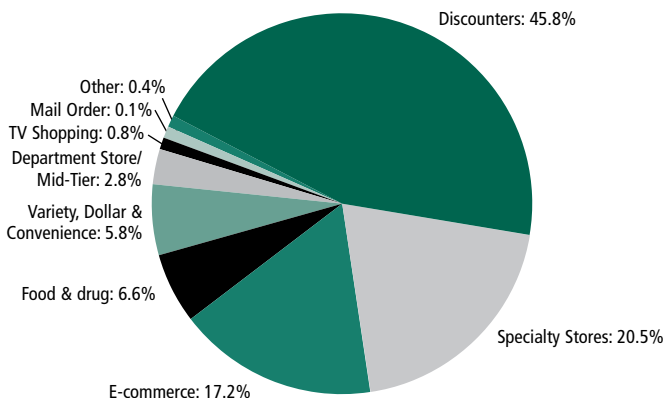
RETAIL SALES OF LICENSED ENTERTAINMENT & CHARACTER MERCHANDISE, BY DISTRIBUTION CHANNEL, U.S. & CANADA, 2017



Note: *Includes TV shopping, mail order, vending, and kiosk sales.

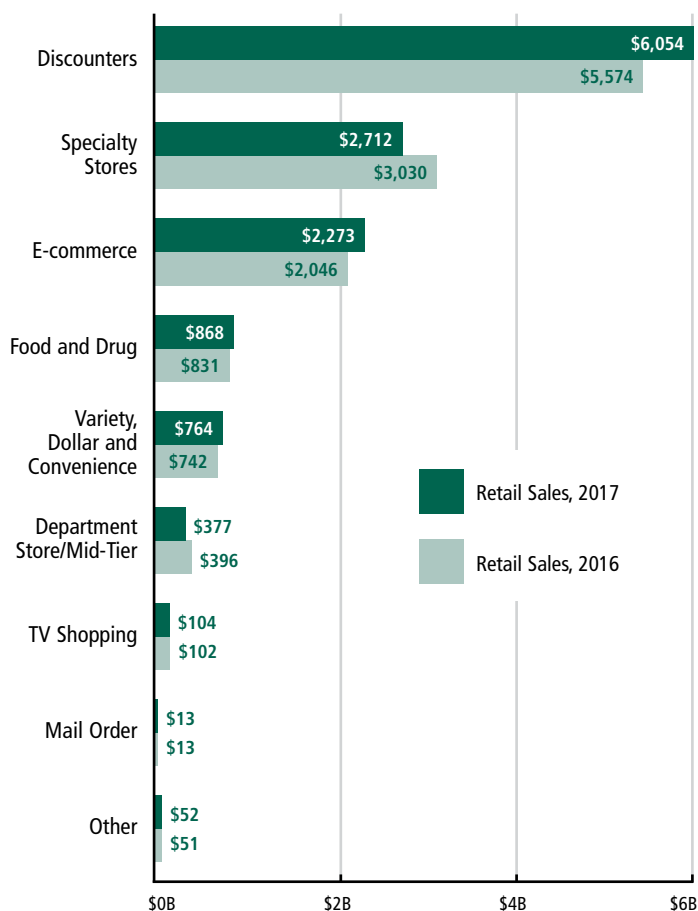
SOURCE: THE LICENSING LETTER

RETAIL SALES OF LICENSED ENTERTAINMENT & CHARACTER MERCHANDISE, BY DISTRIBUTION CHANNEL, U.S. & CANADA, 2017



SOURCE: THE LICENSING LETTER

RETAIL SALES OF LICENSED ENTERTAINMENT & CHARACTER MERCHANDISE, BY DISTRIBUTION CHANNEL, U.S. & CANADA, 2016–2017 (Figures in Millions)



SOURCE: THE LICENSING LETTER

ESPORTS

**Esports Tracker:
New Leagues & Expansions**

Goldman Sachs reports that the esports market will see revenues hit \$2.17 billion by 2023, with a compound annual growth rate of 18.6%, according to a *Reuters* report. The revenue total includes media rights, ticket sales, merchandise, sponsorship, publisher fees, and direct advertisement.

Talent agency **UTA** makes two acquisitions in the esports area: **Press X**, an esports talent and marketing agency, and its sister company **Everyday Influencers**, which furnishes management services for top gaming stars. UTA now represents an additional 90 esports athletes, including *League Of Legends* players Aphromoo, sOAZ, Imaqtpie, Pokimane, and Disguised Toast.

Top streamer **Ninja** locks in a deal with clothing company **PSD Underwear** to launch a line of boxer briefs inspired by the Twitch competitor. PSD is owned by NBA stars Kyrie Irving, Jimmy Butler, and Chandler Parsons.

The **IOC** and the **Global Association of Intl. Sports Federations** host an Esports Forum at the Olympic Museum in Lausanne to “explore synergies, build joint understanding and set a platform for future engagement between the esports and gaming industries and the Olympic Movement.” Invited participants will include representatives from across the esports and gaming ecosystem: players, publishers, teams, media, sponsors and event organizers.

Twitch and **YouTube** will carry live streaming coverage of Universal Open Rocket League, NBC Sports Group and FACEIT’s annual esports tournament. The platforms will live stream nearly 100 hours of action through the weekend of Aug. 24-26.

Activision Blizzard will reportedly offer **Overwatch League** franchisees first crack at the upcoming franchise model for its **Call of Duty World League**. Activision Blizzard is reportedly assessing how to integrate the OWL ownership groups—10 of which do not hold teams in *Call of Duty* at this time—with existing *Call of Duty* participating teams, according to ESPN.

Separately, **Disney** and **ESPN** ink a deal with **Blizzard Entertainment** to televise esports league Overwatch.

Bandai Namco Entertainment hosts the Dragon Ball FighterX World Tour, which launched at the CEO Fighting Game Championships in Daytona Beach. The tour is carried by **Twitch**, which acts as managing partner for league operations, circuit events, and content. The tour will make various “Saga Event” stops, including the Ultimate Fighting Arena (France), Thunderstruck (Mexico), Southeast Asia Major (Singapore), VS Fighting (United Kingdom), and CEO Fighting Game Championships (U.S.). Competitions will be held throughout 2018 and culminate at the Dragon Ball FighterZ World Tour Finals in January 2019.

Read Before Using: \$100 Million List Definitions & Methodology

Before delving into *TLL's \$100 Million list* (pg. 23), take a moment to consider our methodology.

The list reflects the top properties by licensed retail sales in the U.S./Canada only and excludes top-performing global properties that may have \$100 million or higher in sales internationally. Note, as well, the difference between retail sales and revenue: Just because a brand is selling at retail does not mean that it is profitable for its licensor.

It is inappropriate to compare total sales from the *\$100 Million list* to those of the product category (pg. 1) because *TLL* includes a higher range of properties in the former. The list tracks properties that are based on a recognized character(s) and use the strategies associated with an entertainment/character licensing program, as well as the expected TV shows and films.

For example, in our annual business-wide estimates, some properties would be categorized as video games/interactive (Minecraft, Pokémon, and Angry Birds), toys/games (Barbie, My Little Pony), or publishing (Peanuts). In that sense, we've managed to pre-empt some big screen debuts over the years; e.g., Angry Birds (added in 2011, film in 2016) and Minecraft (added 2013, film 2019).

The individual property figures are sometimes at variance with publicly reported numbers in company financials or cited by company executives. We look exclusively at consumer products that are licensed to third parties for manufacture and distribution and for which the manufacturer is paying a royalty. Our analysis does not

include products created through in-house divisions of the licensor rather than through licensing agreements with third parties, or "core" products made by the licensor (e.g., toys for Hasbro- or Mattel-owned properties).

In addition, the numbers reflect retail sales of traditional licensed products but exclude content licensing and nonretail products such as live touring shows, theme park attractions, lotteries and slot machines, cruises, and similar ventures.

For those properties that are multimedia, the estimates include all merchandise for the franchise (e.g., tied to film, TV shows, etc.). LEGO cross-licensing deals (e.g., LEGO Star Wars, LEGO Batman) are included under the respective partners' properties (e.g., "LEGO Star Wars" under Star Wars). Subbrands are included along with the master property (e.g., Clone Wars under Star Wars). If individual properties are sometimes licensed as a group (e.g., Batman as part of a multi-property DC Comics), the estimate includes only those products tied to the individual property as specified.

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

\$100 MM+ ENT/CHAR LIST

37 Entertainment/Character Brands Earned Over \$100 Million in the U.S./Canada

In 2017, a total of 37 properties made *TLL's* annual list of entertainment/character brands that generated over \$100 million in licensed retail sales in the U.S./Canada. Last year, *TLL* tracked 46 brands that qualified for the list based on 2016 sales.

Worldwide, these top brands generated almost \$36 billion in global sales. For the first time in recent memory, the top brands were down a combined 11% from year-to-year. In the U.S./Canada, declines were softer at -4% while internationally, sales dropped -15% overall.

This was a year of extremes—nearly a quarter (24%) of properties on the list saw double-digit increases, an equal number (14%) saw single-digit shifts, and nearly half recorded double-digit declines (49%).

Three brands cleared the \$1 billion mark in the U.S./Canada alone—Mickey, Minnie & Friends (\$1.3 billion), Star Wars (\$1.2), and Paw Patrol (\$1.1). But just one of these brands is on the upswing.

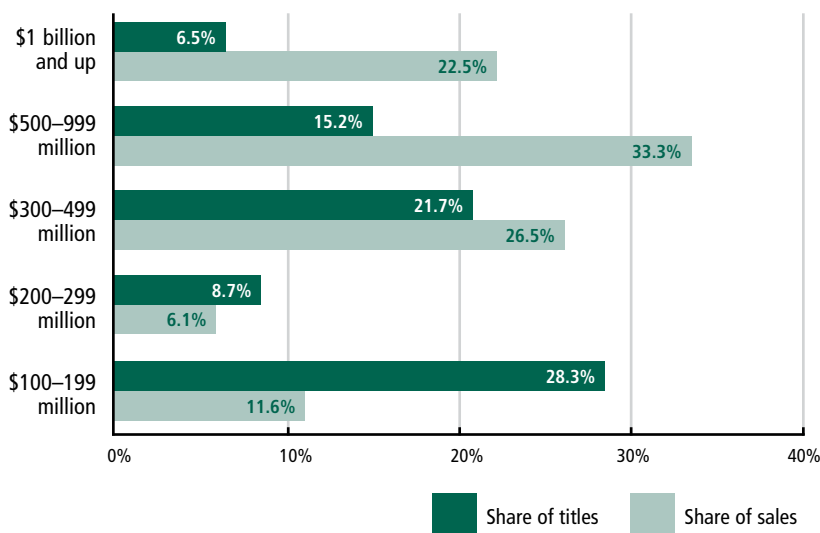
For the purposes of the *\$100 Million list*, Mickey, Minnie & Friends is a new omni-brand combining previously separate listings for Mickey & Friends, Minnie's Bow-Tique, and Mickey Mouse Clubhouse.

ESTIMATED RETAIL SALES OF LICENSED MERCHANDISE BASED ON ENTERTAINMENT/CHARACTER PROPERTIES, WORLDWIDE, 2017 (Figures in Millions)

RANK	PROPERTY	LICENSOR	GLOBAL RETAIL SALES	SHARE U.S./ CANADA SALES
1	Mickey, Minnie & Friends	Disney	\$3,233	39.9%
2	Hello Kitty	Sanrio	\$2,663	24.0%
3	Star Wars	Disney	\$2,403	48.9%
4	Disney Princess	Disney	\$2,133	40.5%
5	Winnie the Pooh	Disney	\$1,649	29.0%
6	Peanuts	DHX Media	\$1,558	29.5%
7	Paw Patrol	Nickelodeon	\$1,550	67.7%
8	Frozen	Disney	\$1,404	57.2%
9	Spider-Man	Disney	\$1,402	34.0%
10	Peppa Pig	eOne	\$1,273	19.4%
11	Marvel Avengers	Disney	\$1,227	43.8%
12	PJ Masks	eOne	\$1,158	85.3%
13	Batman	Warner Bros.	\$1,024	46.1%

SOURCE: THE LICENSING LETTER

SHARE OF TITLES VS. SHARE OF SALES GENERATED FOR \$100 MM ENTERTAINMENT/CHARACTER PROPERTIES, U.S./CANADA, 2017



SOURCE: THE LICENSING LETTER

Although it remains the No. 1 brand, the House of Mouse is facing increasing pressure from up-and-comers like Paw Patrol and PJ Masks as well as its own brands like Star Wars and Frozen. *TLL* estimates that in 2018, Disney’s top two brands will see at least a 10% drop in global retail sales while Nickelodeon’s Paw Patrol will continue to grow internationally.

Thirteen lucky brands cleared \$1 billion in global licensed retail sales, with Disney nabbing four out of five of the top spots (seven in total).

Despite recording sustained drops in retail sales over the last couple of years, Hello Kitty is No. 1 on the list for international sales outside the U.S./Canada in 2017 at just over \$2 billion. With licensor Sanrio focused on developing new character brands and experiential formats, Kitty is expected to continue to fall into 2018.

The top three brands generated 22.5% of all retail sales attributable to the list, or just about \$3.5 billion. Most entertainment/character brands that made the list, or 28%, counted \$100-199 million in licensed retail sales within the U.S./Canada. Compared to last year, however, there were fewer brands that made the cut.

The cohort that contributed the most in sheer dollar amounts (33.3% of sales) were those brands generating between \$500-999 million in licensed retail sales.

Disney, Nick & eOne Drive Sales

Disney properties account for 24% of the number of properties on the \$100 Million list and nearly 38% of licensed retail sales in the U.S./Canada at \$5.9 billion. In 2016, Disney counted 43.2% of all sales attributable to the list.

Despite counting the second-largest number of brands on the list, Warner Bros. properties contributed to 7.3% of retail sales, or just north of \$1.1 billion. On the flip side, eOne counted just 2 properties on the list (5.4% share) but generated 7.9% of retail sales at \$1.2 billion. In its annual report, eOne indicated that its “family and brands” unit grew 60% to reach a total of \$2.4 billion in licensed retail sales thanks to PJ Masks and Peppa Pig.

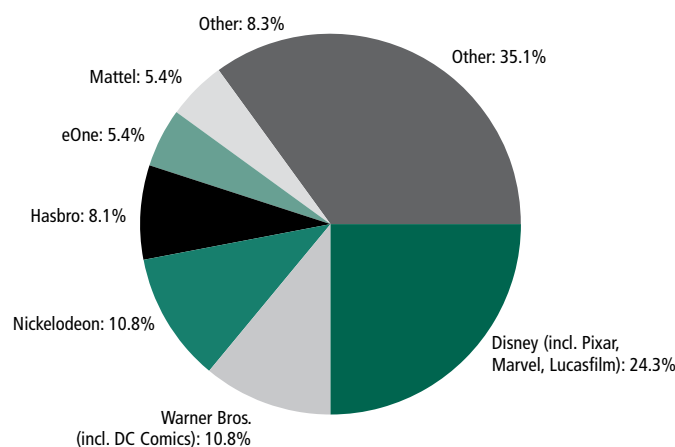
eOne, Hasbro Home to the Fastest-Growing Properties

eOne’s PJ Masks and Nick’s Paw Patrol saw the highest growth rates in 2017, in part because the two children’s brands were starting from low 2016 sales. Growth is expected to flatten somewhat in the U.S./Canada for 2018 as sales level off, but continue to blossom internationally.

Hasbro’s newest acquisition, Power Rangers, had a surprisingly good year in 2017, with the NPD reporting that its branded action figures were No. 1 in that category. Sales are expected to sink like a stone in 2018 before rebounding in early 2019 thanks to the launch of Hasbro-manufactured action figures (which, incidentally, are not counted in this list).

Hasbro’s Transformers and My Little Pony also had a good year, growing 50% and 40% in the U.S./Canada, respectively, thanks to new film releases. The toyco reports that its top two brands generated a combined \$2.7 billion in overall retail sales (including toys manufactured

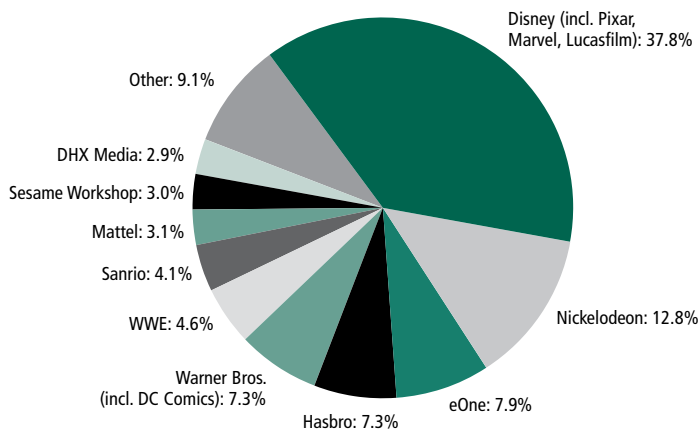
LICENSOR SHARE OF \$100 MM ENTERTAINMENT/CHARACTER PROPERTIES, U.S./CANADA, 2017



SOURCE: THE LICENSING LETTER

Continued on page 22

LICENSOR SHARE OF \$100 MM ENTERTAINMENT/CHARACTER RETAIL SALES, U.S./CANADA, 2017



SOURCE: THE LICENSING LETTER

by Hasbro), compared to *TLL*'s estimate of \$1.3 billion in purely licensed sales.

Disney Cars also bounced back on the list this year thanks to a feature film, and is expected to drop off (or at least get pretty close) next year. For the House of Mouse, Cars was one of its brightest stars, albeit its fifth-largest grossing property for merchandising.

Moose Toys' Shopkins is one of the most exceptional properties on the \$100 Million this year because it is expected to keep growing at a faster pace in 2018 than it has in 2017. The girls' collectable property is worth over \$1 billion at retail overall, compared to \$358 million in licensed retail sales.

As three of the more adult-oriented brands, WWE, Pokémon, and Star Trek had a respectable year in 2017, tracking high single-digit growth. Worth \$1.2 billion at retail overall, WWE had a flattish year domestically with sales tracking higher internationally as the brand continues to expand its viewership.

Despite being worth \$3.5 billion at retail, Pokémon generates just \$473 of that number from purely-licensed merchandise. With 450 licensees globally and Wicked Cool Toys signed on as master toy partner for 2018, *TLL* expects the video game-based property to catch a few more dollars next year.

On the Down-low

Peanuts observed a flattish year domestically, but nevertheless accounted for nearly \$1.6 billion in licensed retail sales worldwide, or \$1.8 billion overall. The other publishing property on the list, Garfield, also dipped slightly in the U.S. The property is cited as generating up to \$800 million in overall sales a year; in 2017, licensed share was roughly half that at almost \$440 million.

FALLING 80% IN 2017 DOMESTICALLY AND 75% GLOBALLY, UNIVERSAL'S DESPICABLE ME/MINIONS HAS REACHED THE END OF ITS MOVIE-DRIVEN HIGHS.

Sesame Street saw its merchandise sales drop worldwide; *TLL* expects its new HBO series to spur some dollar growth going forward.

After sky-high growth (think triple-digits for some licensees), Star Wars is finally starting to fall. Retail sales contracted 21% worldwide to reach \$2.4 billion. Star Wars remains Disney's second-largest source of income for merchandise.

Girl's brands just can't seem to catch a break in 2017: Frozen, Barbie, and Disney Princess were down 15%, 16%, and 18% in the U.S./Canada, respectively. Core toy sales have been stagnating for each of the three properties, especially among younger children.

Dora & Friends saw an even more dramatic drop domestically of 40%, although she continues to maintain her pace of sales internationally. Similarly, the star of the top holiday toy of 2016, Doc McStuffins, will welcome the last season of her TV show this year, and with it, the end of her blockbuster merchandising program.

After seeing a surprising uptick in 2016 (thanks to its collectibles line), licensed sales of Thomas & Friends merchandise slid 26% worldwide. Another '90s powerhouse, SpongeBob SquarePants, observed similar declines but is expected to spring back for 2018 thanks to a new Broadway show and film.

Nick's Teenage Mutant Ninja Turtles saw a steep drop-off at the end of 2017, which will continue through mid-2018 until a new product range gives the property a fresh restart. Unlike the TMNT, however, Warner Bros.' Scooby Doo will not see a similar rebound in the next year. The gang of meddling kids and their dog will hit theaters in a live action film in 2020.

Falling 80% in 2017 domestically and 75% globally, Universal's Despicable Me/Minions has reached the end of its movie-driven highs. Don't bury the franchise yet, though: a sequel film is slated for 2020.

Brands to Watch

While they didn't make the list this year, *TLL* has our eye on a number of up-and-coming properties.

No. 41 on last year's list, Cartoon Network's Ben 10 missed this year's cut-off because there was no major product push for half of 2017. The property saw healthy growth in Europe, and is expected to return for 2018's round-up. In girl's properties, Nick's Sunny Day is expected to light up the list in 2018.

Universal's Jurassic World property has potential to make the list in 2018 thanks to movie-driven sales, as does Disney's The Incredibles and Warner Bros.' Wizarding World.

RETAIL SALES OF LICENSED MERCHANDISE BASED ON \$100 MM ENTERTAINMENT/CHARACTER PROPERTIES, U.S./CANADA, 2016–2017
 (Figures in Millions)

RANK, 2016	PROPERTY	LICENSOR	U.S. & CANADA			OUTSIDE U.S. & CANADA			GLOBAL			SHARE FOR U.S. & CANADA, 2016
			RETAIL SALES, 2016	RETAIL SALES, 2017	CHANGE IN RETAIL SALES, 2016–2017	RETAIL SALES, 2016	RETAIL SALES, 2017	CHANGE IN RETAIL SALES, 2016–2017	RETAIL SALES, 2016	RETAIL SALES, 2017	CHANGE IN RETAIL SALES, 2016–2017	
1	Mickey, Minnie & Friends	Disney	\$1,555	\$1,291	-17%	\$2,428	\$1,942	-20%	\$3,983	\$3,233	-19%	39.9%
2	Star Wars	Disney	\$1,367	\$1,176	-14%	\$1,681	\$1,227	-27%	\$3,049	\$2,403	-21%	48.9%
3	Paw Patrol	Nickelodeon	\$375	\$1,050	180%	\$125	\$500	300%	\$500	\$1,550	N/A	67.7%
4	PJ Masks	eOne	\$260	\$988	280%	\$40	\$170	325%	\$300	\$1,158	286%	85.3%
5	Disney Princess	Disney	\$1,053	\$863	-18%	\$1,671	\$1,270	-24%	\$2,724	\$2,133	-22%	40.5%
6	Frozen	Disney	\$945	\$803	-15%	\$653	\$600	-8%	\$1,598	\$1,404	-12%	57.2%
7	WWE	WWE	\$672	\$726	8%	\$250	\$248	-1%	\$922	\$974	6%	74.5%
8	Teenage Mutant Ninja Turtles	Nickelodeon	\$927	\$649	-30%	\$166	\$174	5%	\$1,093	\$823	-25%	78.8%
9	Hello Kitty	Sanrio	\$888	\$639	-28%	\$2,530	\$2,024	-20%	\$3,418	\$2,663	-22%	24.0%
10	Marvel Avengers	Disney	\$517	\$537	4%	\$726	\$689	-5%	\$1,242	\$1,227	-1%	43.8%
11	Winnie the Pooh	Disney	\$840	\$479	-43%	\$1,951	\$1,171	-40%	\$2,791	\$1,649	-41%	29.0%
12	Spider-Man	Disney	\$463	\$477	3%	\$1,089	\$925	-15%	\$1,551	\$1,402	-10%	34.0%
13	Batman	Warner Bros.	\$530	\$472	-11%	\$569	\$552	-3%	\$1,100	\$1,024	-7%	46.1%
14	Sesame Street	Sesame Workshop	\$504	\$469	-7%	\$271	\$255	-6%	\$775	\$724	-7%	64.8%
15	Peanuts	DHX Media	\$468	\$459	-2%	\$999	\$1,099	10%	\$1,468	\$1,558	6%	29.5%
16	Transformers	Hasbro	\$273	\$410	50%	\$173	\$242	40%	\$446	\$652	46%	62.9%
17	Power Rangers	Hasbro	\$225	\$406	80%	\$136	\$143	5%	\$361	\$548	52%	74.0%
18	My Little Pony	Hasbro	\$234	\$328	40%	\$222	\$332	50%	\$456	\$660	45%	49.7%
19	Superman	Warner Bros.	\$359	\$323	-10%	\$454	\$399	-12%	\$812	\$722	-11%	44.7%
20	Minecraft	Mojang/Microsoft	\$334	\$321	-4%	\$366	\$358	-2%	\$700	\$679	-3%	47.3%
21	Thomas & Friends	Mattel	\$366	\$293	-20%	\$619	\$434	-30%	\$985	\$726	-26%	40.3%
22	Peppa Pig	eOne	\$193	\$246	28%	\$996	\$1,026	3%	\$1,189	\$1,273	7%	19.4%
23	Looney Tunes	Warner Bros.	\$214	\$206	-4%	\$431	\$418	-3%	\$645	\$624	-3%	33.0%
24	SpongeBob SquarePants	Nickelodeon	\$268	\$201	-25%	\$639	\$512	-20%	\$907	\$712	-21%	28.2%
25	Angry Birds	Rovio	\$315	\$189	-40%	\$962	\$625	-35%	\$1,277	\$814	-36%	23.2%
26	Barbie	Mattel	\$224	\$188	-16%	\$149	\$111	-25%	\$373	\$300	-20%	62.8%
27	Pokémon	Pokémon Co.	\$177	\$186	5%	\$276	\$287	4%	\$453	\$473	4%	39.3%
28	Disney Cars	Disney	\$139	\$175	26%	\$450	\$499	11%	\$588	\$674	15%	25.9%
29	Simpsons	20th Century Fox	\$192	\$144	-25%	\$219	\$153	-30%	\$410	\$297	-28%	48.4%
30	Star Trek	CBS	\$132	\$138	5%	\$28	\$42	50%	\$159	\$180	13%	76.8%
31	Shopkins	Moose Toys	\$110	\$138	25%	\$169	\$220	30%	\$279	\$358	28%	38.5%
32	Scooby-Doo	Warner Bros.	\$197	\$134	-32%	\$304	\$219	-28%	\$501	\$353	-30%	38.0%
33	Despicable Me/Minions	Universal	\$535	\$107	-80%	\$787	\$220	-72%	\$1,322	\$327	-75%	32.7%
34	Doc McStuffins	Disney	\$205	\$103	-50%	\$120	\$66	-45%	\$325	\$168	-48%	60.9%
35	Garfield	Paws Inc.	\$107	\$101	-5%	\$331	\$338	2%	\$438	\$439	0%	23.1%
36	Five Nights At Freddy's	Striker Entertainment*	First appearance	\$101	N/A	N/A	\$23	N/A	N/A	\$124	N/A	0.0%
37	Dora & Friends	Nickelodeon	\$167	\$100	-40%	\$546	\$465	-15%	\$714	\$565	-21%	17.8%
TOTAL			\$16,330	\$15,615	-4%	\$23,523	\$19,979	-15%	\$39,854	\$35,594	-11%	44%

Notes: Figures are for retail sales of all licensed merchandise for calendar years 2016–2017. Does not include: Content licensing such as DVDs; products created through in-house divisions rather than through licensing agreements with third parties (e.g. toys at Mattel or Hasbro or Pokémon video games from Nintendo); or non-retail products such as touring shows, theme park attractions, cruises, gambling/lotteries, and the like. N/A=Not applicable. F/A=First appearance. *Agent.

SOURCE: THE LICENSING LETTER

SUPERHEROES

I Need a Hero! Super-based Merch Sales Down 7%

Retail sales of licensed merchandise based on the top superhero properties from Marvel and DC Comics dipped 7% to reach \$4.4 billion in 2017, according to *TLL's* latest edition of the *\$100 Million Entertainment/Character* list.

From the 2017 list, Marvel's top two properties are Spider-Man (\$1.4 billion in licensed retail sales) and the Avengers (\$1.2) while DC Comics is represented by Batman (\$1) and Superman (\$0.7).

It should be noted that DC Comics hosts more brands that do not make it on to the *\$100 Million* list such as DC Super Hero Girls, Wonder Woman, and Suicide Squad. Justice League-based sales are split between Batman and Superman where appropriate, but *TLL* counts film-based merchandise separately.

Accounting for the superhero house's other brands, *TLL* estimates that licensed DC Comics-based sales reached \$2 billion in 2017. Last year, the company reported that fans spent \$4.5 billion on DC-related consumer products in 2016—that figure includes CD, Blu-ray/DVD, comic book, and location-based sales not included in *TLL's* calculations.

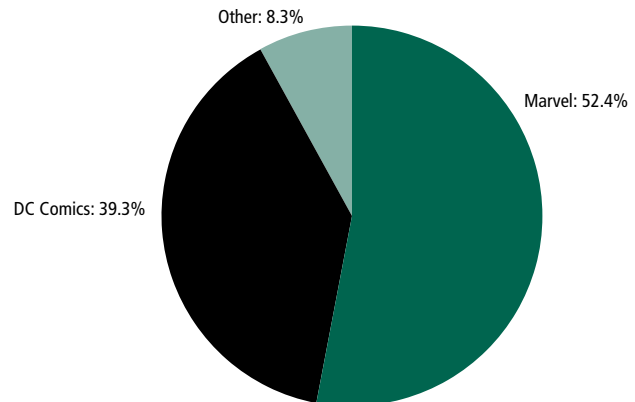
In comparison, total Marvel-based sales reached \$2.7 billion in 2017. The Disney-owned studio counted those additional sales, in most part, from Guardians of the Galaxy. The 2017 sequel's promotional marketing tie-ins reportedly generated \$80 million for Marvel.

Other superhero properties from houses like Valiant Entertainment and Dark Horse Comics generated a combined total of approximately \$425 million in global licensed retail sales, or 8.3% of all licensed superhero-branded merchandise.

Looking forward, superhero-based sales are expected to continue to experience flat-to-down growth, with Marvel Avengers the only superhero brand *TLL* expects to see grow in 2018 licensed retail sales.

THIS YEAR'S BREAKOUT PROPERTIES, BLACK PANTHER AND WONDER WOMAN, ARE GEARED TO TAKE \$10 TO \$20 MILLION EACH IN LICENSED RETAIL SALES IN 2018

RETAIL SALES OF LICENSED SUPERHERO MERCHANDISE, WORLDWIDE, 2017



SOURCE: THE LICENSING LETTER

Just because it's a cultural phenomenon does not mean it will sell. This year's breakout property, Warner Bros.' *Black Panther*, is geared to take \$10 to \$20 million globally in licensed retail sales in 2018. Similarly, DC Comic's *Wonder Woman* is estimated to have enjoyed similar levels of sales in 2017.

RETAIL SALES OF LICENSED RETAIL MERCHANDISE FOR TOP SUPERHERO PROPERTIES, 2016–2017 (Figures in Millions)

RANK, 2017	PROPERTY	LICENSOR	U.S. & CANADA			WORLDWIDE			SHARE U.S./ CANADA, 2017
			RETAIL SALES, 2017	RETAIL SALES, 2016	CHANGE, 2016–2017	RETAIL SALES, 2017	RETAIL SALES, 2016	CHANGE, 2016–2017	
1	Marvel Avengers	Disney	\$537	\$517	4%	\$1,227	\$1,242	-1%	43.8%
2	Spider-Man	Disney	\$477	\$463	3%	\$1,402	\$1,551	-10%	34.0%
3	Batman	Warner Bros.	\$472	\$530	-11%	\$1,024	\$1,100	-7%	46.1%
4	Superman	Warner Bros.	\$323	\$359	-10%	\$722	\$812	-11%	44.7%
TOTAL			\$1,809	\$1,868	-3%	\$4,375	\$4,706	-7%	58.7%

Note: Numbers may not add up exactly due to rounding.

SOURCE: THE LICENSING LETTER

ENTERTAINMENT/CHARACTER

New Content: Film, TV & Digital Ventures

Will Smith and Marc Forster have partnered to acquire **Telepool GmbH**, a German licensing and distribution company. As part of the deal, it will become a development, financing, and distribution partner for Smith's and Forster's films.

Former Nickelodeon producer Butch Hartman launches a Kickstarter project to develop a safe, family-centric SVOD service called **Oaxis**, which will feature original, acquired and user-generated content spanning animation, drama, comedy, feature films, sports, fitness, reality, news and video games. The company has named a \$250,000, 30-day goal to finance the first phase of Oaxis's startup costs with rewards including Hartman-designed digital wallpaper, customized pen and ink drawings from his sketchbook, and an opportunity to participate in a Hartman-hosted video tutorial.

Prior to his departure, Hartman inked a non-exclusive three-year deal with **Pocket.watch** to develop a trio of animated kids series in partnership with the platform's CCO, Albie Hecht. Hartman is also currently maintaining his senior creative consultant role with Pocket.watch.

Marvel's Korean-American superheroine Cindy Moon, star of comic *Silk*, is in early development on a movie adaptation from **Sony** and producer Amy Pascal. A classmate of Peter Parker's, Cindy gains similar abilities to Spider-Man after also being bitten by a radioactive spider around the same time as him. The character appeared in 2017's *Spider-Man: Homecoming* and 2018's *Avengers: Infinity War* played by Tiffany Espensen.

Amazon Studios orders animated series *Invincible* from *The Walking Dead's* Robert Kirkman, Cory Walker, and artist Ryan Ottley. Based on Kirkman's comic book series of the same name, the project marks the first series greenlit under the overall deal Amazon Studios struck with Kirkman last year.

Legendary Entertainment is partnering with Japanese animation studio **Sunrise** to develop a live-action film based on the *Mobile Suit Gundam* anime.

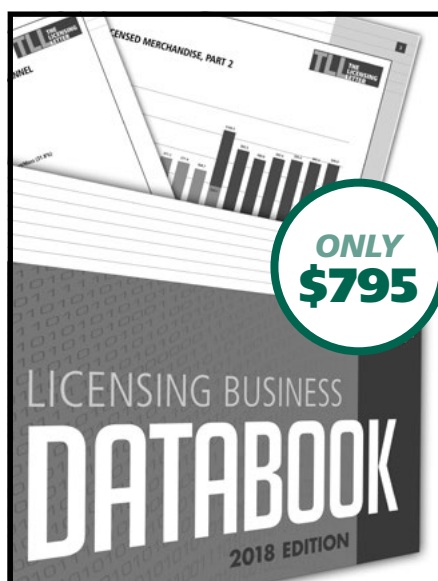
U.K. independent producer **Nevision** is developing a live action adaptation after optioning a trilogy of children's books by **M.G. Leonard**: *Beetle Boy*, *Beetle Queen*, and recently released *Battle of the Beetles*. The trilogy is published by **Chicken House** in the U.K. and **Scholastic** elsewhere. M.G. Leonard is signed on as screenplay writer, Nigel Pickard as Executive Producer, and Ceri Barnes as Development Executive. The deal was negotiated with Kirsty McLachlan of **DGA Ltd.**

Nick Jr. partners with **Vue Entertainment** to bring episodes of *PAW Patrol*, *Top Wing*, and new content from *Shimmer & Shine* to cinemas in the U.K. and Ireland.

Entertainment One enters into a two-year, first-look deal for scripted and unscripted programming with **Cedar Park Entertainment**, David Ayer's and Chris Long's new production house.

Rovio's *Angry Birds World* launches in Qatar, with the indoor section developed by location-based entertainment company **Trimoo** now welcoming visitors. The entertainment park boasts over 4 acres of floor space a roller glider, multi-level indoor/outdoor karting track, trampolines, and The Big Tree interactive learning center, which will teach guests about science and encourage kids to express their musical abilities.

Hasbro debuts *The Play-Doh Show*, a weekly series of minute-long animated shorts, on YouTube. Each episode features stop-motion animations made from Play-Doh modeling compound and focus on themes like pets, birthday parties, and going back to school.



Licensing Letter Exclusive! Instant access to hundreds of charts, tables, graphs and retail sales history you can use for budgeting, business plans, investor proposals and more!

- Hundreds of charts, graphs and tables you can drop right into your presentations
- Visual representation of the full spectrum licensing activity
- FREE JPEG image of every exhibit for use in presentations

PLUS

- Retail sales of licensed merchandise for 35 property types and 38 product categories
- Results by product category for Trademark/Brand, Entertainment/Character, Sports, Fashion, and Art properties
- Sales results of licensed merchandise by distribution channel for key property types
- Selected international data by territory, property type, and product category

ORDER YOUR PDF COPY NOW! Call: 888-729-2315

FOOD/BEVERAGE

Specialty Food in 2018: Tea, Tacos & Tang

New York City welcomed the Summer Fancy Food Show for another year of specialty foods and beverages. Despite fierce competition from the Fourth of July weekend, the World Cup, and the scorching weather, hundreds of exhibitors lined up to show off the latest and greatest food/beverage trends.

The Specialty Food Association (SFA) estimates that retail sales of specialty foods grew 11% over the two-year time span between 2015 and 2017, reaching \$140.3 billion. According to SFA's annual report, specialty food sales outpaced the growth of all food at retail—growth for the former was up 12.9% vs. 1.4% for the later.

Distribution of specialty foods also grew increasingly diversified; U.S. sales through foodservice increased 12.8%, online channels by 21%, and brick-and-mortar by 10.7%. According to exhibitors *TLL* spoke to selling licensed goods on the floor, discount distributors also saw tremendous growth for lower-priced, bulk confectionery as well as healthy snacks.

The SFA estimates that 65% of consumers purchase specialty foods, with 79% of those aged 18-23 buying specialty foods, 67% of Millennials (24-41), 65% of Gen Xers (42-53), and 60% of Boomers (54-72).

At just over \$4 billion in market size, cheese is the largest share of the specialty foods business, followed by frozen/refrigerated meats, poultry, and seafood (\$3.84 billion) and chips, pretzels, and snacks (\$3.82 billion). The top five growth categories under the specialty foods banner in 2017, as compared to 2015, are:

1. Water (+76.1%)
2. Rice cakes (+64.1%)
3. Refrigerated RTD tea and coffee (+63.2%)
4. Jerky and meat snacks (+62.1%)
5. Shelf-stable creams and creamers (+61.7%)

In 2017, retail sales of specialty foods grew at a faster rate than did licensed foods (10.5% versus 6.0% growth compared to 2016). But a clear comparison between the two categories of food/beverage goods is difficult for one simple reason: They overlap.

As part of an overall trend, it is interesting to note just how informed and concerned consumers of specialty foods are. Education is still a large part of the specialty industry's way of doing business, ranging from sustainability (does a honey brand fight to save bees?) to transparent labeling.

One of the bigger concerns noted among exhibitors of all types this year was the packaging their food came in; namely, how to fit all the better-for-you markers (high protein! high fiber! all natural! no added sugars! vitamins and minerals!) on the front. And then, how to get the most simple, readable terminology on the back.

TOP 10 SPECIALTY FOODS/BEVERAGES,
BY MARKET SIZE, U.S., 2017 (Figures in Millions)

FOOD/BEVERAGE	TOTAL MARKET, 2017	CHANGE, 2015-2017
Cheese and plant-base cheese	\$4,005	6.6%
Frozen or refrigerated meat, poultry, and seafood	\$3,841	3.3%
Chips, pretzels, and snacks	\$3,822	11.8%
Non-RTD coffee and hot cocoa	\$3,329	5.4%
Bread and baked goods	\$3,058	18.1%
Chocolate and other confectionery	\$2,368	10.8%
Yogurt and kefir	\$2,229	41.6%
Frozen desserts	\$2,227	41.6%
Refrigerated entrees	\$2,147	27.2%
Frozen lunch or dinner entrees	\$2,143	13.1%

SOURCE: Specialty Food Industry

Teas: From Matcha to Botanicals

Ready-to-drink (RTD) offerings continue to grow at a breakneck pace—cold brew coffee, tea, juice, vegetable blends, water, yogurt, and alcoholic beverages.

This year, the floor was also welcoming to do-it-yourself offerings. Just in terms of coffee, attendees could field samples of whole beans (raw and roasted), instant blends, K-cups and other pods, and cold brew beanies.

For tea, the breakout flavor was matcha—from the traditional powder, to hot brew tea packets, to cold brew pods. But consumers are also thirsty for raw tea, as well as white, red, black, and other (such as yerba mate) varieties.

Botanical, naturally uncaffeinated infusions were also big, with a growing number of people seeking to self-medicate (self care) with natural, “healthier”, alternatives to energy drinks and prescription pills. A number of attendees boasted new or expanded lines of teas meant to cure various ills (energy, sleep, calm, focus, with some even promising better “performance” during bedroom activities).

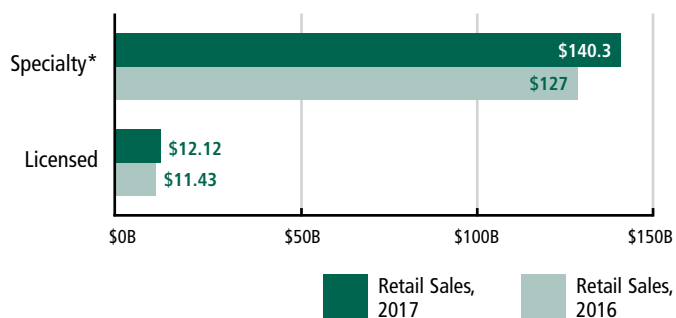
One interesting variant on the tea trend was mixers and beers brewed from organic tea and botanicals.

Tacos, Wraps & Layers

If you must eat something in 2018, it best be wrapped up in something else. Not like a sandwich, though—bread is so blasé—but everything from cheese folios to gluten-free tortilla wraps made from alternative flours were available.

Snack and protein bars have also stepped up their game, with consumers preferring to have a little fun with whole, crunchy ingredients layered on top of soft, filling spreads.

RETAIL SALES OF FOOD/BEVERAGE, SPECIALTY VS. LICENSED, U.S. & CANADA, 2016–2017 (Figures in Billions)



Note: *For U.S. only, includes food service sales. Categories overlap.
SOURCE: Specialty Food Industry, THE LICENSING LETTER

Tang for Miles

In 2018, the flavor profile of choice is loud, bold, and confident. Tangy flavors are being embraced much more widely, although spice (chili, jalapeño, pepper, etc.) remains an outsized presence.

To this end, sauces were everywhere on the floor. Tasting them was an interesting experience in itself, however, as many exhibitors skipped plain bread and instead choose to show off their wares on cheeses or crackers to demonstrate how each emphasized certain flavors. In the same way, sour vinegar and fruit preserves meant to enhance the flavor of cheese (or some gluten-free alternative) also had a moment.

For foodies that don't want to bother with a dip—no worries. There were plenty of chips, tortillas, puffs, and bites that packed enough punch on their own. Mushrooms and meats were much more prominent on the floor this year, boasting full-bodied, mature flavor profiles. Dry snacking meats and jerkies continue to prove popular.

And There's More!

Ancient grains have long been a cornerstone of the specialty food market, and this year quinoa was the MVP. We saw it in every form—whole, as a flour, and in mixes with foods like mac and cheese, oatmeal, salads, and snack bars.

Alternative flours beyond the ancient grains were also in attendance—cauliflower, coconut, and even sunflower seed.

BACK-TO-SCHOOL

Back-to-School Shoppers Dragging Their Feet

American consumers are delaying their back-to-school shopping, which is expected to fall 1% to \$82.8 billion this year from \$83.6 billion in 2017, according to the National Retail Federation (NRF) and Prosper Insights and Analytics. And according to Deloitte's *2018 Back-to-College Survey*, students and their families are expected to spend \$25.5 billion this back-to-school shopping season.

This year, the NRF estimates that K-12 students and their parents plan to spend \$684.79 each for a total of \$27.5 billion. Shoppers plan to spend the most on apparel (\$236.90) followed by electronics (\$187.10), shoes (\$138.66), and school supplies (\$122.13).

The NRF notes that kids today are more discerning, but that in exchange for meeting their exacting standards, parents are expecting kids to contribute. Teenagers will spend \$35.60 of their own money on average for back-to-school, while pre-teens will spend \$25.06. Deloitte notes that while 82% of surveyed parents plan to collaborate with their students on shopping needs, only 18% expect their kids to contribute more than half the budget.

College and graduate spending is set to hit its highest levels yet, with older students spending \$942.17 each for a total of \$55.3 billion. The older cohort will spend the most on electronics (\$229.21) followed by apparel and accessories (\$153.32), furnishings (\$109.29), food (\$102.82), shoes (\$83.41), HBA (\$78.70), school supplies (\$69.46), gift cards (\$62.61), and collegiate branded gear (\$53.34).

Top destinations for both groups are department stores (57% of K-12 versus 40% of college students), online retailers (55% vs. 49%), and discount stores (52% vs. 35%).

Deloitte's report tends to correlate with the NRF's findings, showing that of the average \$1,330 per household that parents anticipate spending this shopping season, 54% of that (for a total of \$13.8 billion) is expected to come from in-store shopping. Just one-quarter (\$6.1 billion) is expected to come from e-commerce.

Mass merchants are the top destination among all income levels, with 75% of Deloitte's respondents planning to shop there. Low-income households prefer dollar stores (32%) and off-campus bookstores (27%), while high-income households prefer traditional department stores (27%) and warehouse membership clubs (26%).

The shopping season is getting longer: the NRF says that more students are starting their shopping earlier and stretching it out until later, including not stocking up for the whole year and instead planning to replenish as needed throughout the year. Eighty-nine percent have not bought half of their lists; of those, half are still waiting for the best deals.

According to Deloitte, retailers can expect the busy season to peak between the last two weeks of July and first two weeks of August, with 80% of all back-to-college shoppers expecting to be active in this period, spending \$14 billion (or 50% of total spend).

EXPERIENTIAL

Stage Shows, Events & Attractions

Discovery Consumer Products collaborates on a line of apparel and accessories with British pop artist **Philip Colbert** of The Rodnik Band. Labeled Discovery Shark, the dedicated pop-up shop opened at Old Spitalfield's Market in the U.K. leading up to the Discovery Channel's week-long event of shark programming.

Zag Heroez Entertainment partners with **Mills Entertainment** to exclusively produce and tour *Miraculous: Tales of Ladybug and Cat Noir*, a live stage spectacular based on the hit TV series. The multi-city national tour is expected to launch Spring 2019.

Ripley's Believe It or Not! reenergizes its history with a two-year touring, digital content, and publishing partnership with action sports entertainment brand **Nitro Circus**. Ripley's will be featured throughout Nitro Circus' live shows and the Nitro World Games. As part of the agreement, Ripley Publishing also becomes the exclusive publisher for Nitro Circus, releasing its first title in Spring 2019.

The **Michael Jackson Estate** and **Columbia Live Stage** are developing a new stage musical inspired by the life of Michael Jackson. The as yet untitled show is expected to arrive on Broadway in 2020 and will boast a book by Lynn Nottage, a score drawing on Jackson's catalogue, and direction and choreography by Christopher Wheeldon.

The newest addition to the **Nintendo** dynasty, Super Nintendo World, is an immersive theme park under construction at Universal Studios Japan with plans to open ahead of the 2020 Summer Olympic Games in Tokyo. The Nintendo-themed attraction is expected to come to the U.S. and "synergize" with IP like Super Mario and Nintendo Labo.

Edutainment Licensing opens new Arty Mouse Pop-Up Activity Centres in China following a deal with **Jolliplay Cultural & Technology Ltd.** in a deal brokered by regional sub-agent **PPW Digital**. The standalone edutainment attractions bring to life to the pre-school property in a series of interactive and immersive play areas that offer kids and parents the chance to learn to read and write English and watch and take part in theatre shows. The first will open in Shanghai and Beijing, with more rolling out across China in 2019.

Warner Bros. Interactive Entertainment launches *Westworld*, a mobile simulation game, based on the HBO TV series of the same name, that invites players to take on the role of a new Delos employee who is given access to the Delos Park Training Simulation. Players control all aspects of Westworld park operations including manufacturing, managing, and upgrading AI based hosts as well as satisfying a wide range of guest desires. The game app was produced by WB Games San Francisco in collaboration with **Kilter Films** and was developed by **Behaviour Interactive**. Almost immediately, however, **Bethesda Softworks** sues over allegedly copied code from Bethesda's own mobile game, *Fallout Shelter*.

Universal and **Earplay**, a developer of interactive audio stories, release *Jurassic World Revealed*, an interactive audio adventure available on **Amazon** Alexa-enabled devices. Players participate with their voice in a parallel story set during the events of *Jurassic World: Fallen Kingdom*.

The Beyblade Burst National Championship brings Bladers aged 8-13 years old to Mall of America in Bloomington, Minnesota to test their skills and compete for the title of the ultimate Beyblade Burst champion. The event is being executed on behalf of **Hasbro** by **Nickelodeon Velocity**, Nickelodeon's partner marketing and creative services team, and Nickelodeon Experience.

Aardman and **Tohokushinsha Film Corp.** will open the Shaun the Sheep Farm Garden within the English Garden Rosa & Berry attraction in Tawada, Japan in April 2019. The attraction features life-sized sets from the world of Shaun the Sheep, such as the Farmer's House and the Sheep's Barn, statues of the series' characters, a café with outdoor terrace, multipurpose facility, and more.

Sequential Brands Group teams up with **USA Today** and **MGM Resorts Intl.** for an event featuring Martha Stewart in Las Vegas this October. The Martha Stewart Wine & Food Experience will take place across 35 outdoor acres in Las Vegas, NV and showcase a variety of food wine, beer, and spirits from both local and national chefs. Themed activations include a showcase of Stewart's branded products; a selfie area; product displays featuring the Martha Stewart lines at Macy's and Michaels, select pieces from the QVC product line, books, and more.

The **Rugby Football Union (RFU)** partners with **Fanatics** to open a stadium store at the heart of England's rugby, Twickenham. The launch is part of an eight-year project to develop the RFU's global retail and e-commerce program. Last year, an original 10-year partnership reflecting global e-commerce rights was extended until 2025 with the addition of all retail outlets at Twickenham Stadium and non-technical product rights.

Kakao Friends, mobile messenger operator Kakao's character licensing arm, changes its name to **Kakao IX** after merging with JOH, a brand consulting firm. Kakao IX plans to upgrade its two flagship character stores in Seoul from conventional gift shops to venues where users can enjoy various cultural experiences. Over the second half of 2018, Kakao IX said it will also push to make inroads into overseas markets, including Japan, China, and Europe.

Italian jewelry brand **Bulgari** adds a Shanghai hotel in partnership with **Marietta Intl.**, bringing its total count to six locations. New luxury hotels are scheduled to open in Moscow, Paris, and Tokyo from 2020 through 2022. Sticking to its luxury jewelry roots, the hotel is designed to be "obviously an authentic Italian hotel with features and services and design and amenities and food that are authentically Italian," per its GM.

Cubicall, a modern office phone booth company, partners with **Warner Bros.** for a limited-edition Superman-themed booth for his 80th anniversary. The phone booth is marketed towards open-floor plan work spaces and offers sound-proof and vision-proof options to office workers.

Japanese lifestyle brand **Muji** opens its first global flagship hotel in Shenzhen, China. The location is operated by **Shum Yip Group**, with Muji providing its brand, “anti-goracious and anti-cheap” design, and products—over 70% of

products in rooms are available for sale at stores, including its signature wall-mounted CD players, tea-sets, bedding, and air diffusers. The hotel business is expected to generate user data as well as boost sales in approximately 200 retail stores in mainland China.

UBM is relocating BLE to ExCeL London from 2019 as part of its strategy to evolve the show, attract even more European licensees, retailers and licensors, and improve the customer experience for both visitors and exhibitors.

FASHION

Fashion Track: Activations & Collaborations

The **Jordan Brand** makes its first-ever women’s collaboration with editorial approval from **Vogue** Editor-in-Chief Anna Wintor. The Air Jordan 1 High Zip “AWOK,” is named after Wintor’s signature on approved editorial or creative pages of the magazine, and will be followed by the Air Jordan 3 “AWOK,” to be released the next month.

Astral Brands completes the purchase of **butter LONDON**, a pure, posh nail and makeup brand known for its chemical-free cosmetics.

Cartoon Network collaborates with Spanish fashion designer **María Escoté** for a new *The Powerpuff Girls* collection on the catwalk at the Mercedes Benz Fashion Week in Madrid. The apparel and footwear collection pays homage to the brand’s 90s heritage with a sophisticated take on female sportswear.

Authentic Brands Group (ABG) will work with cannabis company **Invictus** on a collection of lifestyle-inspired brands. Invictus will tap into ABG’s portfolio of lifestyle brands like Garden Earthly of Delights, Zooney, and Sinister to develop all-new, lifestyle-inspired cannabis brands feature for patients and recreational adult users. Products will include dried flowers, oils, concentrates and consumables that will be rolled out through Invictus’ producer Acreage Farms.

The World of Eric Carle teams up with **Little Goodall** for an apparel line inspired by Carle’s illustrations in a deal brokered by the **Joester Loria Group**. The initial collection will feature *The Very Hungry Caterpillar* and debut in spring 2019 for the book’s 50th anniversary. The entire collection is set to hit the U.S., Canada, France, and Asia in spring 2019.

Social influencer **LaurDIY** partners with the Self Esteem brand from **All Access Apparel** to create a new apparel collection in a deal brokered by **The Brand Liaison**. The fashion blanks are being developed to integrate with the LaurDIY fashion crafting system from licensee **Plaid Enterprises** and will be featured on LaurDIY’s YouTube content.

Differential Brands Group’s Robert Graham brand signs an agreement with **Peerless Clothing Intl.** for men’s

and boys’ tailored clothing, suit separates, and top coats in the U.S., Canada, and Mexico.

In an exclusive partnership with **Amazon**, **Level Brands** partners with **Gravacore** for its Ireland Men One (I’M1) brand to create intelligent, portable, joint-friendly mounted fitness training machines. The five-year licensing agreement includes annual brand participation fees as well as an 8% royalty on net sales of all licensed products sold under the I’M1 brand.

The **Pokémon Co. Intl.** brings characters like Pikachu, Charizard, and Jigglypuff to a children’s shoe range with Italian footwear and apparel company **Geox**. The line, which includes 14 sneaker models, will be supported by pop-ups and in-store events throughout Europe.

DKNY and **Donna Karan New York** enter into a multi-year global licensing agreement with **Marchon Eyewear** and **G-III Apparel Group** to produce sun and optical eyewear launching March 2019.

Ted Baker strikes its 22nd licensing agreement with Israeli manufacturer **Delta Galil** for men’s underwear, pajamas, and loungewear worldwide. The collection launches Spring 2019.

Kenneth Cole has replaced **Reliance Brands** with Mumbai-based **Brandzstorm India** as its partner for designing, manufacturing, distributing and retailing its products in India, Bangladesh and Sri Lanka. The 10-year master licensing agreement aims to cover 1 billion people and open about 10 stores in India by 2020. Two flagship stores in Mumbai and Delhi are likely to be opened by the end of this year. The deal includes different Kenneth Cole product categories like men and women’s apparel, handbags, footwear and travel gear. Watches and fragrances are excluded.

Separately, **Brandzstorm** has also signed a long-term exclusive master licensing agreement with **Giordano Intl.** for apparel, footwear and accessories. The firm additionally has exclusive deals with Furla, Tonino Lamborghini, and Steve Madden.

CONSUMER RESEARCH

Affluents Prefer Shopping Chanel, Nordstrom

Affluent consumers say **Chanel** and **Louis Vuitton** are the most “emotionally intelligent” brands, while among multi-brand retailers, that honor goes to **Nordstrom**, per the **Luxury Institute’s** annual *Emotionally Intelligent Brand Index*. The survey polled over 1,200 individuals with a minimum of \$150,000 annual household income.

Nordstrom performs most strongly on empathy, trustworthiness, and generosity, particularly among women. **Amazon** is the best-known retailer, with 88% familiarity versus 61% for Nordstrom, and also the most popular, with 79% of respondents reporting making a purchase from the e-commerce site in the last 12 months versus 27% for Nordstrom.

Perceptions are extremely mixed for Amazon, with 20% rating the site as having the best quality merchandise and 40% rating it as having the worst. Similarly, 36% say it has the best customer service and 24% say it has the worst. Fashion retailers rated and ranked are in alphabetical order:

- ▶ Amazon
- ▶ Barneys New York
- ▶ Bergdorf Goodman
- ▶ Bloomingdale’s
- ▶ Neiman Marcus
- ▶ Net-A-Porter
- ▶ Nordstrom (*No. 1*)
- ▶ Saks Fifth Avenue
- ▶ Sephora
- ▶ Ulta

Chanel is ranked first for its customer service experience and, like Louis Vuitton, is ranked highly in quality of products and customer service experience. When it comes to human elements, Chanel drops—ranking No. 13 for empathy, #3 for trustworthiness, and #13 for generosity and kindness.

In comparison, Stella McCartney is ranked No. 1 in generosity and kindness, #1 in empathy, #4 in trustworthiness, but #17 in quality of products and #6 in customer service experience. Brands rated and ranked in alphabetical order include:

- | | |
|---------------------------|----------------------------------|
| ▶ Alexander McQueen | ▶ Hermès |
| ▶ Balenciaga | ▶ Louis Vuitton (<i>No. 2</i>) |
| ▶ Bally | ▶ Marc Jacobs |
| ▶ Bottega Veneta | ▶ Michael Kors |
| ▶ Burberry | ▶ Miu Miu |
| ▶ Chanel (<i>No. 1</i>) | ▶ Prada |
| ▶ Chloé | ▶ Ralph Lauren |
| ▶ Christian Dior | ▶ Saint Laurent |
| ▶ Dolce & Gabbana | ▶ Salvatore Ferragamo |
| ▶ Donna Karan | ▶ Stella McCartney |
| ▶ Fendi | ▶ Tory Burch |
| ▶ Giorgio Armani | ▶ Valentino |
| ▶ Givenchy | ▶ Vera Wang |
| ▶ Gucci | ▶ Versace |

PUBLISHING

Newspapers & Magazines Shake Things Up

Hearst’s King Syndicate Feature and Emerging Tech divisions launch the conglomerate’s first AI-voice enabled entertainment for **Amazon Alexa**. Trivia Treat is meant to offer a challenging and fun daily gameplay experience for players around the world with games and puzzles.

The *NYT* is stepping up its content licensing game with the re-branding and grouping of its syndication and licensing arms into **The New York Times Licensing Group**. The paper aims to have more of its content in aggregation and on radio and podcasts, starting with a licensing deal on Medium and an upcoming TV show based on the Times’ long-running Modern Love column. The *NYT* is particularly looking towards magazines, like its current style supplement title *T*, that are fully or co-branded with the paper.

After folding *Teen Vogue* and *Interview*, **Condé Nast** lays off an additional 8 *Vogue* staffers as part of an “internal reorganization”—the American mag’s most significant layoffs in two years, according to *BoF*. Earlier this year, a

few staffers were let go from *Allure* and *GQ*. For months, rumors have swirled surrounding the departure of *Vogue’s* Editor-in-Chief, Anna Wintour. *WWD* now reports that the publisher is mulling cutting *W Magazine*.

The *New York Post* launches **New York Post Entertainment**, focused on scripted and unscripted television. President and producer Troy Searer will head development of projects for cable, broadcast, streaming and emerging platforms.

Maxim and global marketing agency **Lagardere Sports and Entertainment** announce a new joint venture to redesign, produce, and market the magazine brand’s three annual tentpole events—the *Maxim Hot 100*, *Halloween* and *Big Game* events—as the new “Maxim Experiences” platform. As part of the joint venture, Lagardère Sports and Entertainment will market and sell the events, from both a partnership and ticket perspective.

Who's News

Are you hiring—or being promoted, changing jobs, retiring, launching a new company, or otherwise changing your employment? Email Jen at jen@plainlanguagemedia.com and we'll announce the news in our next issue of Who's News.

Jennifer Lee and **Pete Docter** are appointed the new Chief Creative Officers of Walt Disney Animation Studios and Pixar Animation Studios, respectively. The *Frozen* and *Inside Out* filmmakers report directly to Walt Disney Studios Chairman **Alan Horn**. **Jim Morris** and **Andrew Millstein**—the respective Presidents of Pixar Animation Studios and Walt Disney Animation Studios—will continue to report to Disney and Pixar President **Ed Catmull**, who reports to Horn.

Separately, Walt Disney Intl.'s SVP Media Distribution **Mark Endemaño** steps down after 14 years at the House of Mouse.

Karen K. Miller joins NBCUniversal's U.S.-based Universal Kids as SVP Content. Plus, marketing executive **Ellen Stone** has a newly expanded purview that includes Universal Kids.

GameStop names **Dawn Henry** as its new VP of pop culture merchandise division, ThinkGeek, reporting to SVP **Janet Bareis**. The retailer recently added **Kris Ventura** as VP Collectables Merchandising.

9 Story Media Group taps **Angela C. Santomero** to serve as CCO following the prodc's acquisition of Out of the Blue Enterprises, since rebranded as 9 Story USA. Santomero co-founded Out of the Blue and has worked as a creator, executive producer, and writer on several preschool titles including *Blue's Clues*, *Super Why!*, and *Daniel Tiger's Neighborhood*.

Posh Paws Intl. welcomes **Sally Fielding** as its new Sales Director.

Jennifer Twiner McCarron is promoted to CEO of Thunderbird Entertainment. She will also stay on as CEO of Atom Cartoons, a Thunderbird subsidiary.

TSBA Group is expanding its team with the appointment of **Richard Woolf** as Intl. Licensing Director.

Rainbow appoints a new CEO for its Bardel Entertainment division, **Rick Mischel**.

As the NYT re-brands and re-groups its syndication and licensing arms into The New York Times Licensing Group, **Michael Greenspoon** is appointed as its Manager.

The U.S. Olympic Committee names **Sarah Hirshland** as its 12th CEO. Hirshland comes

to the organization after serving as CCO for the United States Golf Association.

Xcel Brands taps **Jim Fielding** to serve on its Board of Directors. Fielding is currently President Consumer Products & Innovation at Twentieth Century Fox Film Corporation and Fox Network Group.

DHX Media appoints **Jon Gisby** to the position of Managing Director at WildBrain, its digital kids' network and studio.

Boat Rocker Media names **Andrew Spergel** to the newly-created role of EVP Boat Rocker Ventures. Spergel was previously SVP Corporate Development & Strategy at Entertainment One.

Spin Master forms a Russian subsidiary, Spin Master Rus LLC, and will begin direct distribution in early 2019. Overseeing sales and marketing activities will be **Andrey Savchenko**, GM Russia.

Alex Soto is appointed Gaumont's first Creative Director for animation and family. Soto was most recently Executive of Creative Development for Spin Master Entertainment.

NCC Media veteran CEO **Greg Schaefer** is named the company's Executive Chairman, reporting to the NCC Board of Directors. He stays on through the remainder of 2018 to ensure a smooth leadership transition to new President & CEO **Nicolle Pangis**.

Viacom promotes **Kurt Patat** to an expanded role as SVP Communications for Paramount Network and CMT.

Under new President & CEO **Marvin Ellison**, Lowe's restructures its executive team:

- ▶ The positions of COO, Chief Customer Officer, Corporate Administration Executive, and Chief Development Officer are eliminated.
- ▶ The company initiates an external search for a newly created position, EVP Stores. They will oversee the North, South, and West divisions, Orchard Supply Hardware, operations engineering, pro and services businesses, and asset protection.
- ▶ The senior leaders of the store operations team will report to the CEO until an EVP Stores is named.
- ▶ **Mike West** serves as a transitional EVP Supply Chain as Lowe's searches externally for someone to fill the new role.

▶ **William Boltz** joins on Aug. 15 as EVP Merchandising, where he will be responsible for merchandising, marketing, digital and data analytics, and customer insights.

▶ COO **Richard Maltsbarger** leaves the company effective immediately.

▶ On Nov. 6, Chief Customer Officer **Michael McDermott** will also leave Lowe's.

MGA Entertainment appoints a new Senior Brand Manager, **Simone Inskip**, for the U.K. Little Tikes team.

Cartoonist and educator **Gene Luen Yang** joins the Board of Directors for the Comic Book Legal Defense Fund.

Walmart names U.S. CMO **Tony Rogers** to the newly created post of Chief Member Officer at Sam's Club, effective in late July.

Separately, the retailer appoints former American Express executive **Janey Whiteside** to the newly created role of Chief Customer Officer. She joins Walmart Aug. 1 and will be responsible for both B&M stores and e-commerce.

Card and board game manufacturer Carta-mundi names **Stefaan Merckx** as its new CEO. He succeeds **Chris Van Doorslaer**, who passed away in December 2017.

MGM acquires Big Fish Entertainment, expanding Mark Burnett's television division. The company will continue to operate as Big Fish Entertainment, with Founder & President **Dan Cesareo** to remain President, reporting to **Barry Poznick**, President Unscripted Television at MGM.

Former Hasbro, Ocean Spray, TJ Maxx, and NPD Group executive **Donna Tobin** launches a new marketing and consulting studio to aid the development of new products called SKY-D8. Tobin is currently in the process of discussing a new gender-neutral IP targeting multiple consumer groups with licensing partners, publishers, and entertainment studios.

TOMY restructures its European business, bringing it in under the TOMY Intl. arm, the subsidiary responsible for North America, Latin America, (and now) Europe. TOMY Intl. President **Pete Henseler** and CEO **Greg Kilrea** will take on the new international assignment. **Mary Wood** continues to lead the U.K. business.

Continued on page 36

Who's News, Cont'd.

Coty Inc. restructures its Consumer Beauty leadership team under the division's President, **Laurent Kleitman**:

- ▶ **Mike Bryce**, Global CMO Color Cosmetics, oversees the international color cosmetics portfolio including Rimmel, Bourjois, and Miss Sporty.
- ▶ **Mark Cooper** is now Global CMO for retail hair, body care, and lifestyle scenting. He leads marketing for brands including Clairol, Wella, Adidas, David Beckham, Katy Perry, and Nautica.
- ▶ **Ukonwa Ojo** is now Global CMO Cover Girl, Sally Hansen & Consumer Beauty U.S. She oversees U.S. marketing of brands including Rimmel, Clairol, and mass fragrances.
- ▶ **Sean Foster** is appointed SVP Digital & E-commerce for Consumer Beauty and global e-commerce.
- ▶ **Jing Mertoglu** is promoted to SVP Consumer Marketing & Insights for global consumer beauty.

Valiant Entertainment hires **Matthew Klein** as Director Sales.

UTA launches a standalone esports division that will be led by Press X and Everyday Influencers co-founder **Damon Lau**. Lau reports to **Ophir Lupu**, Head UTA Games, and **Sam Wick**, Head UTA Ventures.

Tervis promotes **Hosana Fieber** to CFO.

The Neiman Marcus Group appoints **Darcy Penick** as President of Bergdorf Goodman starting Sept. 4 and reporting to **Geoffroy van Raemdonck**, CEO. Penick will manage the Bergdorf Goodman brand, including its online enterprise and two Manhattan-based flagship locations.

The Toy Association forms a new Creative Factor Advisory Board made up of innovators and experts across a range of creative fields: **Brett Klisch** (Creative Factor), **Robin Raskin** (Living in Digital Times), **Warren Tuttle** (United Inventors Association Board of Directors), **Billy Langsworthy** (Mojo Nation), and **Matt Nuccio** (Design Edge). The advisory board is tasked with growing The Toy Association's educational programming, events, and resources for toy inventors, designers, and entrepreneurs.

Bed Bath & Beyond's new Chief Merchandising Officer is **Todd Johnson**, succeeding **Art Stark**, who left the company last month.

Oprah Winfrey makes a significant investment in True Food Kitchen and joins the board of the growing restaurant chain.

Pentland Brands appoints **Charlotte Cox** as Brand Director Team Sports (Canterbury & Mitre), **Kevin McFadyen** as Brand Director Berghaus, and **Nicola Mathews** as Brand Director Fashion (Karen Millen & Ted Baker).

Universal Studios Hollywood named **Mariela Ure** to the post of CMO. She joins from Wells Fargo & Company.

Brand consultancy outfit Golden Goose appoints the experienced licensing professional **Mark Bezodis** to the role of commercial director.

Authentic Entertainment co-founder/CEO **Lauren Lexton** is exiting the production company she co-founded 18 years ago. Authentic's former Head Development **Helga Eike** will take over for Lexton, returning as its new President.

Barnes & Noble fires yet another CEO, **Demos Parneros**, for "violations of the Company's policies" without pay. While the bookseller searches for a new CEO, the temporary leadership team consists of: **Allen Lindstrom**, CFO; **Tim Mantel**, Chief Merchandising Officer; and **Carl Hauch**, VP Stores.

G2 Esports names **Peter Mucha** to the company's senior executive team as the COO.

Bagpuss creator **Peter Firmin** dies aged 89.

The Toy Association remembers **Ava Slepicoff**, a 31-year veteran of the toy industry, who has just passed.

Steve Ditko has passed away. Ditko was the co-creator of Spider-Man, Doctor Strange, and several other characters from Marvel, DC, Charlton, and other publishers. He retired from mainstream comics in the late '90s.



ORDER ONLINE BY VISITING WWW.THELICENSINGLETTER.COM. FAX YOUR ORDER TO 855-649-1623, OR MAIL YOUR ORDER TO THE ADDRESS BELOW, OR PHONE 888-729-2315.

- THE LICENSING LETTER:**
One-year subscription (12 issues) \$495 + \$19.95 S&H = \$514.95. For rates outside North America contact jen@plainlanguagemedia.com.
- TLL's LICENSING BUSINESS DATABOOK:** \$795
- TLL'S LICENSING BUSINESS DATABANK:** \$995
- INTERNATIONAL LICENSING: A STATUS REPORT:** \$1,795
- LICENSING SOURCE BOOK ONLINE:** \$995
- 2016 SPORTS LICENSING REPORT:** \$449

Check enclosed in the amount of \$ _____

Bill me/my company: PO # _____

Please charge my credit card: Visa MasterCard AmEx

Card number _____

Exp. date _____

Signature _____

Plain Language Media, LLLP (PLM)
 PO Box 509, New London, CT, 06320
 Phone: 888-729-2315, Fax: 855-649-1623
customerservice@plainlanguagemedia.com; www.TheLicensingLetter.com

NAME _____

TITLE _____

COMPANY _____

ADDRESS _____

CITY _____ STATE _____ ZIP _____

PHONE _____

FAX _____

E-MAIL _____