

INSIDE: IT'S A "WICKED" TAKEOVER!

THE LICENSING INDUSTRY'S THOUGHT LEADER

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DECEMBER 2024

so Popular!

Universal's Vince Klaseus discusses the gravity-defying program for the the cinematic event of the year, "Wicked."

The Results
are In!
The Influentials

The Elf on
the Shelf
Turns 20

A Focus on U.K.
Retail and Licensing
MINISO

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WICKED



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About the Issue

License Global is turning pink and green! Have you heard that Universal's "Wicked" is now in theaters? It's also here on License Global pages, taking over our December issue in celebration of the film event of the season. "Wicked" consumer products are seemingly everywhere! In this issue, Universal shares how fans of "Wicked" can find branded merchandise in many categories that will thrill diehard fans who followed the IP from the Broadway stage to the big screen to those discovering the story for the first time.

In this issue, we look extensively at the power Gen Z has in the fashion realm. Their influence in apparel, footwear, health and beauty has brands taking notice and concentrating on brand licensing partnerships that will appeal to this generation with buying power.

A brand in touch with the next-gen shoppers is MINISO. It's taking Europe by storm with a series of brick-and-mortar openings in the last 12 months. We talked to MINISO's chief operating officer about its growth and how they're focusing on what properties shoppers want.

While we recap the top stories on Licenseglobal.com in our annual Year in Review, we also look ahead with our Toy Forecast: what are the hottest categories, and how will popular IP appear in the future?

Last but certainly not least, we present our Influentials report, where we spotlight nine people in the brand licensing industry who have made a mark in 2024.

The License Global team wishes you a joyous holiday season and a prosperous new year!



"Wicked" stars, Cynthia Erivo and Ariana Grande, pose with the Mattel dolls based on their characters, Elphaba and Glinda.

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Brand Licensing: A Driving Force

In automotive and motorsports, licensing allows brands to expand their reach, diversify revenue streams and strengthen their brand equity.

ONE OF THE primary reasons for the success of brand licensing in automotive and motorsports is the strong emotional connection consumers and race fans have with these brands. Cars and motorcycles represent adventure and status, making them highly desirable symbols. By associating their brands with everyday products, these extensions generate additional revenue and strengthen brand recognition and desirability among consumers.

The automotive industry has witnessed a surge in brand licensing activities. Car manufacturers have realized the potential to extend their brand identities beyond the confines of their vehicles. Luxury brands like BMW, Mercedes-Benz and Audi have successfully ventured into fashion, accessories and home goods.

Moreover, automotive brands have collaborated with lifestyle brands to create limited-edition vehicles or accessories. This cross-branding strategy leverages the appeal of both brands to attract new customers.

Like music, the automobile transcends every generation. From the legendary movie, “American Graffiti,” with its 1950s muscle cars to the current “Fast & Furious” franchise, the entertainment industry has always featured fast, powerful and exotic vehicles.

As a recent example, the film, “Ford v Ferrari,” is the true story of our client, Carroll Shelby, building a revolutionary race car for Ford to beat Ferrari at the 24 Hours of Le Mans in 1966. Shelby’s victory soon achieved legendary status, and that win, coupled with Shelby’s passion for building some of the best performance vehicles in the world, quickly became an aspirational brand for all. This, of course, led to a very robust brand licensing program that delivers best-in-class licensed products to consumers.

Motorsports, with its adrenaline-fueled events and passionate fan base, presents a unique opportunity for brand licensing. Formula 1, NASCAR and our client, NHRA, are just a few examples of motorsport-sanctioning bodies that have successfully capitalized on their brand value. By partnering with licensees to create various products, these brands can leverage on the excitement and passion surrounding their events. Fans can purchase licensed merchandise, such as team apparel, collectibles and home décor products, to show their support and connect with their favorite drivers and teams.

Apparel and merchandise are the most common licensing categories in motorsports. Teams and drivers collaborate with apparel brands to create official merchandise, such as T-shirts, hats and jackets. These highly sought-after items serve as a tangible connection to fans’ favorite teams and drivers.

For many muscle cars from the ’60s and ’70s, there continues to be a demand for using vintage logos, images and artwork. For our clients, NHRA and World of Outlaws racing series, for example, licensees have tapped into an extensive library of images, vintage and contemporary logos and artwork to create and deliver unique products to consumers who have an affinity for motorsports.

Beyond apparel, motorsports brands have ventured into other licensing areas. The gaming industry, for example, has become a major player in motorsport licensing. Official video games allow fans to experience the thrill of racing from the comfort of their own homes. These racing games, such as the “NHRA Speed for All,” featuring iconic tracks and drivers, have become popular among gamers.

Motorsports organizations have also ventured into the experiential market, offering fans exclusive opportunities to meet drivers, attend VIP events and even participate in driving experiences. As race fans continue to seek authentic experiences and personalized products, brands will have increasing opportunities to expand their reach through strategic licensing partnerships.

While automotive and motorsports brand licensing offers numerous benefits, it also comes with challenges. Brands must carefully manage their licensing partnerships to ensure licensed products are consistent with their brand values and do not dilute their brand equity. The competitive landscape also requires brands to continuously innovate and create new and exciting products to stay relevant.

Despite these challenges, brand licensing has become a powerful tool for automotive and motorsports brands to expand their reach, generate additional revenue and strengthen their connection with consumers. By leveraging their iconic status and partnering with the right licensees, these brands can create a wide range of products that resonate with their target audience. As the global marketplace evolves, brand licensing will likely remain a driving force in the automotive and motorsports industries. ©

“The automotive industry has *witnessed a surge* in brand licensing” - Andy Lieb, JRL Group

Andy Lieb is president of JRL Group.



Costume Changes

Nancy Hutson, co-founder, Full Stop Productions and Costume Studio, highlights how live entertainment can shift to be more sustainable, and how her company is leading the charge.

by MCKENNA MORGAN

THIS COLUMN HIGHLIGHTS Full Stop Production's sustainability initiatives and how they're hoping to change live entertainment. Nancy Hutson, co-founder of Full Stop Productions and Costume Studio, chats with License Global on how the company plans to do this and what it has already done.

License Global: For those unfamiliar with Full Stop Productions, what is it that you guys do and how do you fit into the licensing space?

Nancy Hutson: We have two separate businesses. There's Full Stop Productions, which produces live events, shows and experiences all over the world. We specialize in IPs, but we do all sorts of things. We do live shows, primarily family, but some other things as well. But really in that live entertainment space is our specialty. Then our second company, which we just launched in July, is Full Stop Costume Studio. We design, build and refurbish theatrical costumes, costume characters and character overlays. Obviously, that's heavily in the IP and licensing space because many characters fall into both of those categories: theatrical and costume characters. We're all over the licensing space in both of those companies.

Why did you decide to launch Full Stop Costume Studio?

It was a natural progression for us [that arose] from a gap that we saw in the industry when trying to costume and refurbish our own projects. We were struggling with cost, we were struggling with quality and quite frankly, to get on a list in some costume houses is a 12-to-18-month lead time and you just don't always have that luxury.

Chris Nobels, my business partner, and I have been in this business working for corporations, working in live shows and working in family entertainment for many, many years. We had this unique perspective of the end-user and we thought, "what if we take that experience, how we know the costumes have to last when they get on a tour, how they have to be built so that you can rotate many cast members through, we can teach dressers and costumers how to maintain costume characters so they don't need to be completely tossed and rebuilt in

a couple of years?" From a user aspect, we thought we had a lot of knowledge that we can bring to the industry and look at it from a different point of view. So, based on that gap, what we saw is a definite need and something that we could fill within our industry. We assembled a rockstar team of seamstresses, specifically in the costume industry. We have fabulous drapers, and we're working together with them to solve the end-user problems and then try to come up with new ways of delivering these costumes, particularly for the IPs and the licensors.

How is Full Stop changing the live entertainment industry to be more sustainable?

Chris and I combined have 50 years in the business working for different companies and working for different IPs, both from a production aspect and from a costume aspect ... A lot of what we're doing is talking to people about how we can help you repair the characters that you have, teach the people that you already have and work with them to care for them better so that your costumes can last longer.

How do we help clients extend the life of those characters? Just by caring for them better. We know that might mean we don't get to build a new one right away, but we think for our industry that that's a better message than just constantly new build. Recycle and reuse. With just a little bit of care, these characters can last a very long time, and we have a great team in place that has that knowledge of how to extend the life of those things. Sustainability is super important to us.

What trends are you seeing in the live entertainment landscape, especially for licensed IP?

We see that people still want to own popular franchises. They still want theme-based entertainment, and they still want characters they know. One of the trends that we see is taking that popular franchise and blending it with an educational component, particularly the museums. Consumers are looking for content that's meaningful ... They want to participate in the activity versus just purely sit and watch a show. ©

To celebrate the initiatives and individuals behind change, License Global explores how the licensing industry is making an impact on sustainability and diversity and inclusion through a monthly insight column, "Changemakers."

This column has been edited. To read the full interview, visit [Licenseglobal.com](https://www.licenseglobal.com).



Brands at Play

BY BEN ROBERTS

Video Game Trends of 2025

License Global highlights the upcoming trends that will significantly impact the world of video games, fandom and brand licensing.

AT THE DAWN of 2024, we kicked off the Brands at Play campaign to highlight the influential factors and trends shaping the evolving business of play. We began by exploring the movements influencing gaming across the year, and as we look ahead, it's only fitting to revisit the emerging gaming trends defining 2025 with more toy companies and IP holders leaning into digital gaming.

Reboots and Revivals

We've seen numerous successful franchise revivals for next-generation technology (such as "Resident Evil 2," "Final Fantasy VII" and "Tony Hawks Pro Skater 1") set the bar for the return of prominent IPs. We expect upcoming titles like "Perfect Dark," "Donkey Kong Country," "Tomb Raider" and "Star Wars: Knights of the Old Republic" to drive activity amid an already heated global release slate. Remakes, reboots and revivals tap into the emotional core of first-time players, delivering modern experiences with a familiar touch while reviving original game-play mechanics and building on-ramps for new fans.

Cross-Media Storytelling

Following the success of "The Last of Us" and "Sonic The Hedgehog," the curse of video game adaptations has long been broken, and new stories are spilling onto our screens in more exciting and innovative ways. After Variety discovered a "Mass Effect" television series entering the works with Amazon, the slate continues to grow as "A Minecraft Movie," Amazon's "Secret Level," "Ghost of Tsushima" and more prepare to hit our screens. As a proven platform for generating new audience awareness and established fan engagement, we forecast more secret and hidden adaptation projects to increasingly see the green light across the TV and movie space.

UGC Takes Center Stage

Player-driven content creation has never been more powerful, with platforms like "Roblox" and "Minecraft" leading the charge with Gen Z and Alpha by allowing users to shape their gaming experiences. By 2025, expect a deeper focus on community-driven worlds and user-generated experiences as these platforms increase in reach and relevance. User Generated Content (UGC) empowers players to craft and monetize their content, contributing to game evolution and fostering connections, so there may even be greater sub-trends for consumer products. We now see an increasing rate of cele-

bratory events to mark launches, branded zones and games and community-driven experiences based around popular IP. As a result, developers will continue to provide tools for fan creators, sparking demand for customization kits, fan-designed products and events.

The Expansion of Mobile

With an estimated 2 billion mobile gamers worldwide (source: Statista), the growth of mobile gaming continues unabated, with ever-evolving hardware and social connectivity features transforming gaming into a deeply collaborative space. Multiplayer experiences serve as social hubs where players connect for in-game events, virtual concerts and co-op missions. Pioneered by platforms like "Fortnite" and "Roblox," with titles like "PUBG," "Fall Guys" and "Monopoly GO" continuing the innovation and excitement for players, this approach will become more pervasive across genres and brands.

Gaming as a Fully Immersive Experience

By 2025, AR and VR technologies will be further integrated into gaming, blurring the lines between digital and physical realms. Accessible AR and VR devices will enable players to engage with games in new, highly immersive ways, the deeper connection between virtual and physical experiences will open new doors for location-based experiences. The existing Zero Latency collaboration with Games Workshop on the Warhammer 40K VR experience has already proven the viability of gaming as a physical experience, and we forecast the continuation of that trend with more and more gaming communities meeting in person to game together like the good old days.

The Esports Phenomenon

Despite years of market perception issues, Esports will continue its ascent as a global entertainment powerhouse, influencing gaming culture and consumer product demand. Tournaments attract massive audiences and turn players into global influencers. They also offer a viewing platform for those absent from the stadiums and venues to follow their favorite teams. The demand for esports-themed products – such as team jerseys, exclusive collaborations, customized gaming peripherals and lifestyle gear – will remain strong and opportunities for brands to partner with top-tier teams and players will grow as it becomes more encased within generational culture. ©

Ben Roberts is content director of License Global.

To read the full "Brands at Play" column, please go to Licenseglobal.com



Toys Brands Expand into Mediums

Licensing helps extend the toy industry's reach into new mediums..

THE TOY INDUSTRY is undergoing a transformation, driven by the rapid rise of digital entertainment and evolving play patterns among children. Toy brands such as Mattel, Spin Master, Hasbro and LEGO are pioneering a new era of interactive experiences by blending traditional toys with digital games, apps and online platforms. This approach not only enhances how kids play but also expands the reach and appeal of brands, captivating players of all ages across multiple mediums. Through strategic licensing, digital partnerships and collaborations with streaming and video game platforms, toy companies are redefining how children engage with their favorite characters and franchises.

Spin Master's PAW Patrol franchise is an example of how traditional toys are evolving. A beloved TV show and toy line, "PAW Patrol" has expanded into the digital realm with mobile games, interactive apps and even virtual reality (VR) experiences. This cross-platform engagement keeps children immersed in the "PAW Patrol" universe far beyond traditional play, encouraging them to experience the brand across screens, physical play and emerging virtual spaces.

Licensing Bridges Digital and Physical Worlds

Popular video games, streaming shows and online content have become valuable sources for toy companies seeking to expand their product lines and tap into existing fan bases. By licensing characters and concepts from digital worlds, toy companies create physical products that resonate with children who already love these characters online.

Roblox has shown how digital entertainment can fuel toy sales. Jazwares, a leading toy partner, developed a line of Roblox-themed figures that lets players take their virtual experiences offline, creating a seamless integration between digital and physical play. Similarly, LEGO's collab with "Minecraft" has redefined the concept of hybrid play, fostering creativity across dimensions.

Streaming Platforms as Licensing Incubators

Platforms like Netflix, Disney+ and Amazon Prime Video have more significant roles as incubators for new intellectual property (IP) in the toy industry. Rather than relying solely on well-known brands, toy companies are now leveraging these platforms to evaluate new content that, if successful, can be translated into toy lines. This strategy has proven especially effective with animated series, which resonate strongly with Gen

Alpha and provide a solid foundation for toy extensions. For example, Disney+ streams "Bluey," a BBC-licensed IP that has become a consumer products juggernaut.

User-Generated Content Builds Licensing Trends

YouTube has become a driving force in the kids' entertainment licensing sector. Companies like Moonbug Entertainment have capitalized on YouTube's immense reach, transforming brands like "Blippi," "CoComelon" and "Little Baby Bum" into major players in the preschool market. Where Disney and Nickelodeon once dominated, YouTube channels and their characters now command a significant portion of children's entertainment, pushing licensing boundaries in unprecedented ways.

One of the most striking examples of this trend is "Skibidi Toilet," a viral sensation that began as a brief YouTube video in 2023 and quickly evolved into an entertainment franchise. Bonkers Toys rapidly introduced "Skibidi Toilet"-themed merchandise that has been flying off the shelves at retailers like Walmart, underscoring how swiftly digital content can be transformed into real-world products. Film and TV adaptations, including collaborations with major Hollywood producers, have only increased the momentum of this viral franchise, exemplifying the vast potential of user-generated content in shaping modern licensing trends.

The Power of Licensing in a Digital Age

Data from the global research firm, Circana, underscores the importance of licensing in the modern toy industry, with licensed toys making up 32% of the total toy market in the first half of this year. Sales of licensed toys have risen by 6% compared to 2023, with popular franchises like Pokémon, Squishmallows, "Star Wars," and Hot Wheels leading the charge. These statistics highlight licensing's power to shape consumer demand and reinforce the success of hybrid play models.

As digital entertainment grows, the role of licensing will only become more crucial. In this new, speed-to-market era, the future of play lies at the intersection of digital and physical worlds, with licensing as the essential connector. By continuing to invest in licensing and digital partnerships, toy companies can stay ahead in an industry that is evolving faster than ever.

In a world where kids interact with digital media from an early age, the toy industry is adapting to meet the needs of a new generation. ©

Steven Ekstract is managing director of Global Licensing Advisors. Ekstract is also the founder of License Global magazine

50%

In our Toy Report, licensors forecasted an increase in interest for licensed goods in 2024/2025.

40.4%

of Leading Licensees want to work with toy and games licensors in 2025.

\$85.2B

Sales of licensed consumer products by the Top 20 brands in the Top Agents Report 2024.

\$233.7B

Retail sales of licensed consumer products by the top 20 brands featured in Top Global Licensors Report 2024.

Brandscape Insights

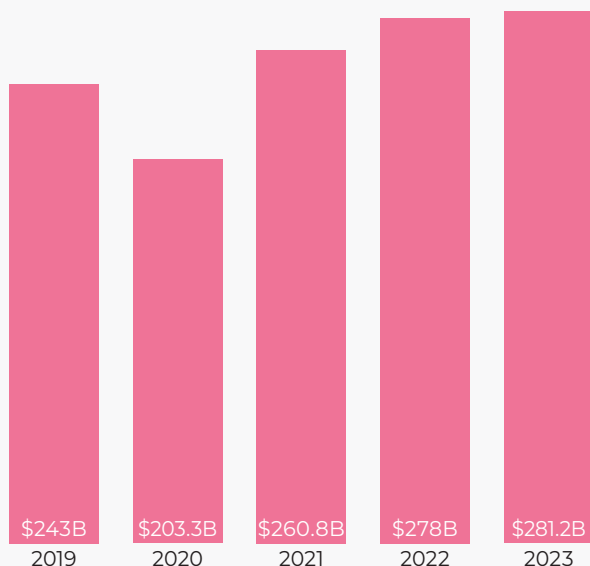
License Global scans the data from its 2024 Brandscape reports.

LICENSE GLOBAL DATA takes many forms, from website traffic and issue clicks to social media engagement. However, the most valuable insights come directly from industry contributions for our annual reports, such as the Top Agents, Top Global Licensors

and Leading Licensees. To mark the year's end, we present an overview of key data gathered through in-depth surveys, financial analysis and global market research. For full access to these comprehensive reports, visit Licenseglobal.com to download them. ©

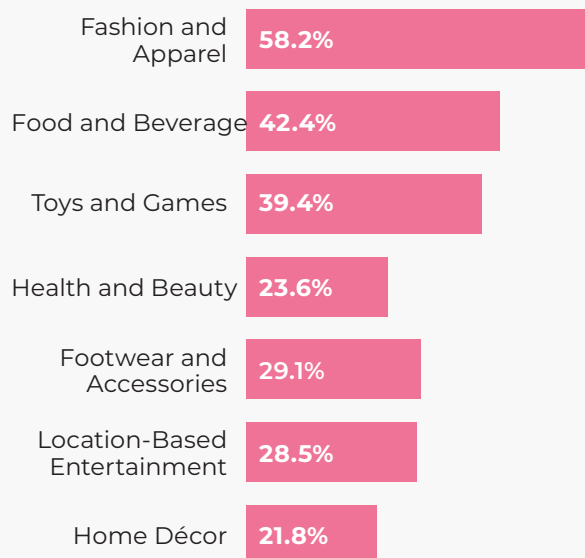
GROWTH IN RETAIL SALES OF LICENSED CONSUMER PRODUCTS

(Total value year-on-year of the Top Global Licensors report)



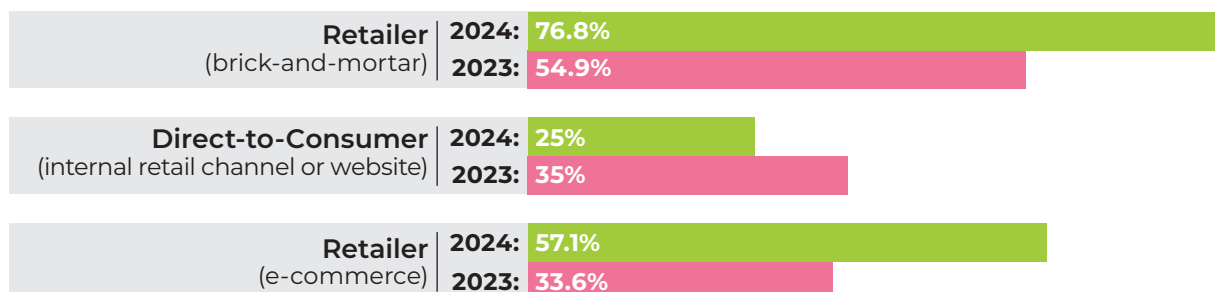
CATEGORIES TO WATCH IN 2025

(A collective view of both agent and brand owner forecast surveys)



What Retail Channels are a Focus?

Retail is one of the most important elements of business for the licensee. This year, we've seen a shift in what retail channels are the most fruitful for licensees.





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A Letter from London: Reflecting on 2024

What a year. 2024, you have been amazing.

At Licensing Expo in May, we welcomed 12,000 international licensing professionals, 5,000 brands, 106 new exhibitors and an incredible 35% more retailers to Las Vegas for an event that buzzed with the sound of business deals from start to finish.

France Licensing Day in Paris followed hot on Licensing Expo's heels, connecting 40 exhibitors with more than 400 French licensing professionals. An exclusive keynote was delivered by the Paris 2024 Olympic Games' licensing and retail director, Edouard Bardon, weeks before the opening ceremony. And the day ended with the glittering Licensing International France Awards ceremony.

And then came Brand Licensing Europe. Not just any Brand Licensing Europe, THE BIGGEST EVER Brand Licensing Europe. Could there have been a better way to celebrate BLE's 25th anniversary? I don't think so. BLE 2024 united nearly 11,000 attendees, including 1,417 retailers – another BLE record – with 241 exhibitors for thousands of meetings, including over 6,000 prebooked through our online Event Planner.

If Licensing Expo whispered, "Business is back," then BLE unashamedly hollered it from the rooftops. There was palpable excitement across the floor, lots of positive energy and a renewed sense of confidence around the brands on show, the opportunities on offer and the future of the industry.

Looking ahead to 2025, and the forecast movie slate gives us even more reason to embrace this optimistic outlook. There's everything from "Paddington in Peru," "The

Smurfs Movie" and Disney's "Snow White" to "Wolf Man," "Captain America: Brave New World," "Superman," "The Fantastic Four: First Steps," "A Minecraft Movie," "Karate Kid: Legends," "Elio" and "How to Train Your Dragon."

This is positive news across all consumer product categories but will be particularly welcomed by the toy industry, which will be equally buoyed by predictions that revenue from toy sales across this year's holiday season is expected to improve.

Although sales of licensed toys have performed consistently well over the past decade, movie releases are not the be-all and end-all for toy sales. Next year marks the anniversaries of several big toy brands; Hasbro's Barrel of Monkeys, Spirograph, Operation and Trouble will be 60 and Monopoly celebrates its 90th, plus the kidult trend continues to rise.

More exciting brand anniversaries include Baby Shark – can you believe it will be 10 years old next year? – Oasis' iconic album, "What's the Story Morning Glory?" (30), "Back to the Future" and Bananaman are both celebrating the big 4-0, Peanuts is 75 and Elvis Presley reaches the grand old age of 90.

There's plenty there to keep retailers across both sides of the pond happy. And talking of retailers, this year, I was incredibly proud to see the investment we've made in our retail initiatives over the last few years really pay off across all our events.



ANNA CLARKE (KNIGHT)
senior vice president, licensing,
Global Licensing Group

Those initiatives include our long-established Retail Mentoring Programme, which has helped over 1,000 retailers to better understand the licensing industry, Licensing for Retail Day conference, the appointment of Laura Freedman-Dagg as our head of retail and our pre-event concierge service for retailers to hand-match them to the right brands to meet.

These initiatives will be expanded and improved for 2025, allowing us to educate even more retailers throughout the world who are new to licensing and give them the confidence to attend our events and meet brands for the first time while providing retailers who are experienced in licensing with the content they need to keep them up to date, ahead of the game, truly engaged in this industry and returning to the shows to connect with exhibiting brands year after year.

And, finally, congratulations to everyone who is included in License Global's The Influentials 2024. To the disruptors, innovators, change makers, brand builders, collaborators, experts, newcomers and influencers, thank you all for contributing to this wonderful industry that we are lucky enough to be a part of every day. I hope that wherever you are spending the holiday season, you have a restful time with family and friends, and I look forward to speaking to and seeing many of you in the New Year.

Ground Up Releases Marvel's Miles Morales Sneakers

Ground Up has announced the release of its latest sneaker, Marvel's Miles Morales Lace Up, available at Kids Foot Locker in boys' toddler and boys' preschool sizes. The Marvel's Miles Morales Lace Ups bring Spider-Man's style to life. Designed with young fans in mind, these high tops feature a black, soft, pebbled PU with striking red accents, along with Spider-Man mask lace charms and grey suede PU with white cotton laces. Each sneaker has Spider web prints and Spider-Man symbols, offering a signature style.



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POMP, SNOW & CIRQUEumstance Finds New Success in 2024



It's the end of 2024, and it has been an exhilarating year for many brands and intellectual properties. But it has been particularly excit-

ing for POMP, SNOW & CIRQUEumstance (PSC) – a book series, television special and live show. Since the company's first attendance at Licensing Expo 2024, PSC has landed multiple deals and partnerships, one of which includes the art brand, Crayola.

"As a result of an initial meeting at Licensing Expo, Crayola Experience has teamed up with POMP, SNOW & CIRQUEumstance to debut 'A Magical Circus Adventure' this Christmas season," says Kristin Luise, director of marketing and retail, Crayola Experience. "Collaborations like this offer unique and engaging experiences that inspire kids to put their imagination into action."

"A Magical Circus Adventure" with POMP, SNOW & CIRQUEumstance will debut Dec. 14-15 at the Crayola Experience in Orlando, Fla. The story-based experience will immerse guests in a vibrant fusion of creativity and feature circus-themed activities, interactive book readings, a Crayola Experience magic show, live performances and holiday surprises.

Along with Crayola, PSC is growing its brand with Armed Forces Entertainment to produce a new 30-minute holiday TV

special, to be released this holiday season for U.S. military troops and their families worldwide. The special will be led by a new robotic character, RoboClaus, and showcase an array of performances, theatrical stagecraft, drone displays and inventive costumes inspired by the PSC storybook series and live productions. And, PSC is not stopping there.

Fans can also expect to see RoboClaus, book readings and performances in IT'SUGAR stores soon.

"By integrating the PSC characters and immersive presentations into our retail environment, we aim to create a distinctive entertainment experience for our customers, which we hope to implement across many of our 100 locations nationwide," says Justin Clinger, assistant vice president of creative and licensing, IT'SUGAR.

As many look toward the new year, people can expect the company to continue its global brand expansion into other licensing categories such as toys, entertainment, retail, books, location-based experiences and much more.

Homesick Candles and KFC Cook Up Collab

Home fragrance and lifestyle brand, Homesick Candles, has partnered with KFC to bring the aroma of KFC's secret recipe of 11 herbs and spices into your home. From the crispy, savory notes of fried chicken to the warm, buttery scent of KFC biscuits, these limited-edition candles perfectly capture the essence of your favorite comfort foods.

The collection is available on Homesick.com and KFCShop.com while supplies last:

- **Bucket of Chicken Candle** – Inspired by KFC's Original Recipe, the "Bucket of Chicken" candle has top notes of chicken and browned flour, paired with peppercorn and celery, rounded out with base notes of oregano, sage and garlic.
- **Buttery Biscuit Candle** – With the aroma of KFC's famous biscuits, golden honey and baked flour are in the top notes, with hints of caramel, butter, and salt in the middle, finishing with a warm base of buttermilk and toasted vanilla.
- **Bucket of Chicken Car Freshener** – In addition to the candles, the collection includes a Bucket of Chicken car freshener, bringing the scent of KFC's fried chicken.



Toei Launches ‘Hypergalactic’ into Roblox

Toei Animation, in collaboration with Spaceport and Twin Atlas, has announced “Hypergalactic: Monkey Quest,” a Roblox game launched in support of the upcoming feature film, “Hypergalactic.”

The game, developed by Twin Atlas, serves as the central player hub for a connected universe of interconnected games and experiences on Roblox beginning with an additional seven games, all licensed through Spaceport Technologies.



“Monkey Quest,” the core game at the center of the “Hypergalactic” Universe, offers fans a first glimpse into the world of “Hypergalactic,” featuring immersive gameplay, stunning visuals and engaging storylines. As players navigate through the core game, they will have the opportunity to explore interconnected games that expand on the “Hypergalactic” universe, each offering unique experiences and exclusive content.

“The launch of the ‘Hypergalactic’ core game on Roblox is a major milestone for Toei Animation and Spaceport,” says Le Zhang, founder, chief executive office, Spaceport. “By creating a central hub and connecting it with a universe of licensed games, we are providing fans with a comprehensive and dynamic series of experiences that will introduce them to the most exciting new IP from Toei Animation.”

“We are thrilled to see the launch of the first series of games for ‘Hypergalactic,’ developed by so many talented Roblox game developers,” says Yoshi Ikezawa, head, international co-production, Toei Animation. “‘Monkey Quest’ serves as the gateway to a larger universe of interactive experiences, allowing fans to dive deep into the world of ‘Hypergalactic.’ By collaborating with multiple development studios through Spaceport, we can offer a diverse array of games that capture the essence of our film. Creating moments of delight as our new fans immerse themselves into the stories of ‘Hypergalactic.’”

‘Blippi & Friends’ Channel Expands in EMEA and APAC

Moonbug Entertainment, a subsidiary of Candle Media, has announced a deal with Yango Play to bring its “Blippi & Friends” channel to families across the Middle East and North Africa. Named after Moonbug’s live-action preschool brand, Blippi, “Blippi & Friends” is a 24/7 channel catering to children ages 4-8 and includes a daily segment for younger preschoolers.

Moonbug launched the channel earlier this year to coincide with Blippi’s 10th anniversary. This deal marks the company’s latest partnership for “Blippi & Friends.” Last month, the company launched its first “Blippi & Friends” channel in Asia through a deal with Astro in Malaysia. These new partnerships add to the momentum of the channel’s expansion across EMEA and APAC.

The “Blippi & Friends” channel features a 24/7 lineup of shows from the Blippi universe, including “Blippi Visits,” “Blippi Draws,” “Meekah,” “Blippi Specials” and “Blippi Wonders.” Other favorites include “Oddbods,” “Supa Strikas,” “Insectibles,” “T-Rex,” “Mia’s Magic Playground” and “Antiks.” The daily segment designed for younger preschoolers showcases shows such as “CoComelon,” “Little Angel,” “Arpo” and others, encouraging co-viewing among families.

Each day, Blippi delivers a message to young viewers, promoting positive behaviors like physical activity, healthy eating and a passion for learning.

“Our channels are crafted to seamlessly integrate into daily family life, providing children with opportunities to learn and grow through play,” says Nicolas Eglau, managing director, EMEA, APAC and global distribution, Moonbug Entertainment. “This focus on

engagement is a key reason why Moonbug’s channels continue to see year-over-year growth for our partners. We’re delighted to bring the new ‘Blippi & Friends’ channel to Yango Play subscribers, and we look forward to expanding this innovative 24/7 Blippi experience to more platforms globally.”

“Blippi & Friends” is available in 35+ countries across EMEA and APAC.



It's Showtime: Warner Bros. on 'Beetlejuice Beetlejuice'

License Global spoke with Preston Kevin Lewis, head, consumer products and retail strategy, Americas, Warner Bros. Discovery. A member of LG staff also attended "Beetlejuice Beetlejuice: The Afterlife" Experience at Ovation Hollywood and sat down with two of the minds behind the experience: Kathleen Wallis, vice president, global themed entertainment, Warner Bros. Discovery, and Sofia Altuna, team lead, U.S. Originals, Fever.

License Global: How did the 'Beetlejuice Beetlejuice: The Afterlife Experience' partnership come to be, and what inspired its creation?

Kathleen Wallis: Our theatrical department, Warner Bros. Pictures, reached out to my team, which is global themed entertainment at Warner Bros. Discovery, and said they'd love to create an immersive experience, which they've done for a lot of the big tentpole movies in the past. They were thinking bigger this time with "Beetlejuice." They reached out to us and asked how we could do a bigger experience that could run longer. I instantly thought of Fever because they are our premier partner, and we have four different experiences in the works with them. They have a global presence and are an all-around excellent team. This project is unique in that usually we just have a license with a partner, and we develop the experience, but we had a very close collaboration with theatrical. We had access to all the film reference, the props and costumes, and that made a big difference in elevating the whole experience, and being able to deliver a very authentic, immersive experience for fans. It was a very smooth process. We really refer to it as the dream team. Whenever we had an issue, we just got on the phone and said, "Okay, what's important to you? What do you think?" and solved it. Usually, these things are minimum 12 months, and we like to have 18 months.

What makes the 'Beetlejuice Beetlejuice: The Afterlife Experience' different from other location-based experiences, and how have you integrated other licensed goods and promotions?

Sofia Altuna: For this experience, we wanted to bring together many different elements. You'll notice that there is a lot of live entertainment.

We have ten actors in the Afterlife, ghosts, and that has been one of my favorite things. We also have a lot of set recreations and a lot of moments for a good photo opportunity. We have a full diner, where we have food, and people can come and stay here for a while. It's an experience for families, for people of all ages. We've seen that people that are passionate about the original "Beetlejuice" that came out in 1988, want to bring their kids, and so we created a space that even though some horror is involved, it's good for people of all ages. I think you get a lot of different things in this experience.

Wallis: I would say the actors have made a huge difference. Having 10 actors in this size space is amazing, and they're all so talented. As Sophia said, the food for an experience of this size is usually very limited. What we've seen over the last few days is that people are really enjoying the food. They're sitting down, having dinner, and Denny's is doing some of the food; two of the menu items for our collaboration at the restaurant are here at the experience: Beetlejuice-y Sliders and The Cookies and Scream.

Altuna: In the Beauty Salon section of the experience, we have the NYX and Splat Beetlejuice Beetlejuice products. The sponsorships have been wonderful for this, and we've integrated it very naturally into the space.

Roughly, how many licensees have been secured to date, and what retail channels (bricks and mortar, e-commerce) are involved?

Preston Kevin Lewis: We have over 450 global licensees and retailers for "Beetlejuice Beetlejuice," and "Beetlejuice" core. Around 100 of them are for North America alone, with retail placement across all channels of distribution. Key North America retail collaborations include Target and Walmart, an Amazon "Beetlejuice Beetlejuice" storefront, Saks Fifth Ave. in-store merchandise, a digital campaign and an immersive window display at the NYC flagship, top fashion partners like Hot Topic and Forever 21, the latter of which recently launched a collection dedicated to "Beetlejuice" (both film and core) with over 40 SKUs, along with our key costume retailers, including Spirit Halloween and Party City.

When and how did your search for 'Beetlejuice Beetlejuice' licensing and retail partners begin, and how quickly did programs emerge?

Lewis: Our search for licensees and retail partners for "Beetlejuice Beetlejuice" started early in 2023, driven by the excitement and anticipation surrounding the new film. We focused on identifying partners who could truly capture the unique essence of the IP and connect with its diverse fanbase. We have a number of established partners that we knew would be a great fit but also prioritized potential licensees who we thought were well-suited for this film. With any big tentpole film, this initial phase involved a lot of research, meetings and discussions with our theatrical colleagues and the creative team behind the film to ensure we partnered with the right collaborators who shared our vision for the brand. Programs quickly began to take shape, and we saw a ton of interest which reflects how strong the enthusiasm has been not only for the new film but also the franchise at large.



The Kersheh Group Partners with John Deere for Apparel

The Kersheh Group, a North American sleepwear and loungewear company, has collaborated with the John Deere brand. Launching in June 2025, the collection will feature sleepwear, loungewear and underwear for men, women and children, alongside family sleep sets.

"We are thrilled to partner with John Deere, a heritage brand known for quality and

trust," says Sam Kersheh, chief executive officer, The Kersheh Group. "This collaboration aligns with our commitment to offering high-value products to our retail partners."

"For the active, hard-working farmers, construction workers, maintenance crews and weekend warriors who bring our brand to life, downtime is sacred," says

Kellye Haskin, licensing category manager, John Deere. "John Deere's partnership with Kersheh is focused on delivering quality products to the most comfortable part of our customer's day."



JOHN DEERE

Products of Change Conference: From 'Nice to Have' to 'Need to Have'

The Products of Change Conference (formerly the Sustainability in Licensing Conference), now in its fifth year, returned Nov. 6 to the Royal Geographical Society, London.

This year's focus landed on the shifting regulatory landscapes, including the Ecodesign for Sustainable Products Regulation (ESPR) and the Digital Product Passport (DPP), while embedding sustainability into core business strategies.

After an opening keynote on the importance of future-focused sustainability from the world's youngest sustainability advocate, Moksha Roy, the conference began by bringing experts from all fields of consumer prod-

ucts to the stage to discuss how the business needs to make a difference.

The ESPR, which guided much of the conference, mandates that products be designed for durability, reparability and recyclability, underscoring the need for circular economy strategies. It also requires products to be more energy-efficient, increase recycled content and provide more explicit sustainability information.

Throughout the conference, attendees explored ESPR's impact on manufacturing, marketing and disposal and how the new Digital Product Passport (DPP) initiative—which requires detailed product information via QR codes—aims to boost transparency.

Helena Mansell Stopher, founder, Products of Change, captured the theme of continuous improvement, reminding attendees: "Perfection doesn't exist; everyone is on a journey."

The 2024 Products of Change Conference was a critical platform for exploring the regulatory pressures and opportunities shaping today's consumer goods market. Attendees left with a clear call to action: companies must embed sustainability into every aspect of their operations to comply with regulations like ESPR and the DPP, meet consumer demands and secure long-term growth. With innovation and transparency as guiding principles, industries have the chance to redefine their impact and drive a sustainable future.



so Popular!

Universal's Vince Klaseus discusses the gravity-defying program for the cinematic event of the year, "Wicked."

BY AMANDA CIOLETTI

LOOK AROUND... EVERYTHING is pink and green as Universal celebrates "Wicked," its feature film tentpole.

From Universal Pictures and director Jon M. Chu, and starring Cynthia Erivo and Ariana Grande in the titular roles of Elphaba and Glinda, "Wicked" is the big screen adaptation of Stephen Schwartz's eponymous Broadway smash-hit, which itself was adapted from the New York Times best-selling book by author, Gregory Maguire. The first of the two-part movie franchise premiered globally on Nov. 22, with the second installment set to hit theaters in Nov. 2025.

"Wicked" stars, Cynthia Erivo and Ariana Grande.



VINCE KLAUSEUS
president,
Universal Products
and Experiences.

Chock full of beloved fan-favorite songs and melodies, "Wicked" tells the backstory of "The Wizard of Oz's" Wicked Witch of the West, long before

Dorothy dropped her house onto the yellow brick road. The film is centered on the misunderstood (and green-skinned) Elphaba and her unlikely, yet deeply connected, friendship with the bright and bubbly Glinda as the two young sorceresses navigate growing up and asserting their convictions in the land of Oz.

And with it comes the opportunity to bring the story of a lifetime into the hearts and carts of fans all over the world.

An IP that is 'Popular'

It is no surprise “Wicked” is dominating the Universal portfolio – the fan-favorite Broadway musical has been touring the globe since 2003, making it one of the top five most popular shows of all-time and one of the longest running.

With an original score that is as deeply connected to the storyline as the yellow brick road, “Wicked” has been performed in more than 100 cities and 16 countries, counting more than 65 million tickets sold (source: Variety). Its songs, such as “Popular,” “Defying Gravity” and “For Good,” are cultural mainstays known the world over.

It's of no surprise, then, that Universal is betting big on a consumer products program that rivals the most complex of superhero franchises on the market. After all, this is a chance to launch a wholly new franchise in a genre that is broadly appealing to multiple demographics – from kids and adults to women and men on almost every continent.

“We have the opportunity to deliver a story, characters and themes that the world could really use right now,” says Vince Klaseus, president, Universal Products and Experiences.

He continues: “The stage show launched more than 20 years ago, which means you've got generations of fans that have been built over time. The movie engages current fans and plays into multi-generations – it's such a powerful, exciting, action-oriented and emotional film, and that mix of ingredients speaks well to general audiences and families. Each of those pieces are going to resonate with the world right now.”

The film offers Universal the opportunity to look at franchising from a fresh perspective while still capital-



izing on themes that are relatable the world over – everything from female empowerment to the meaning of friendship, good vs. evil, the power of conviction, diversity and inclusion and the fight for voices that might not be loud enough to cut through

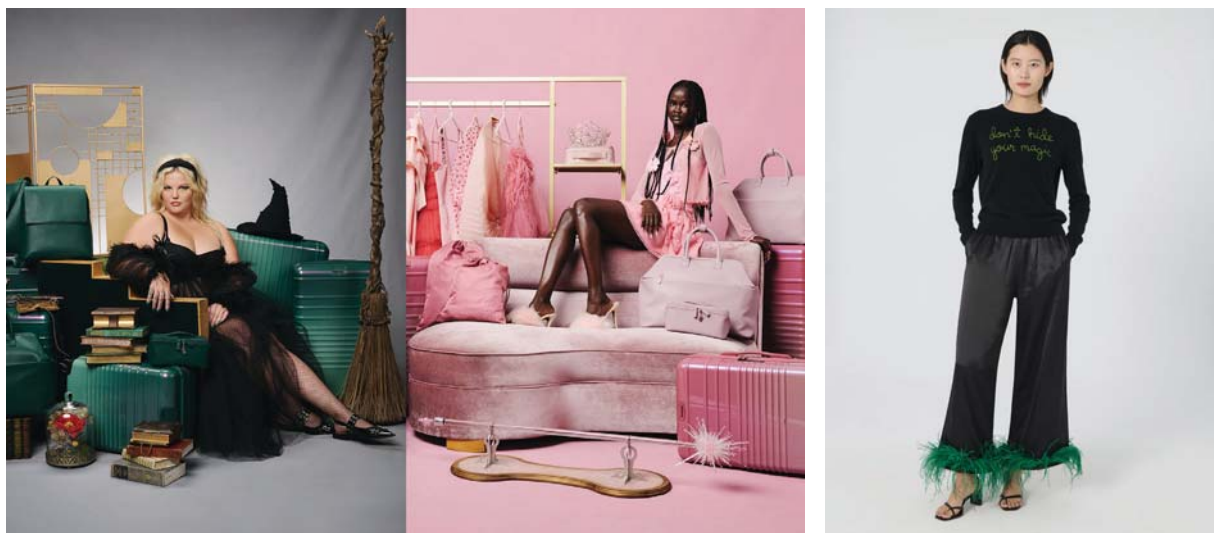
the noise. In short, it's not your typical blockbuster tent-pole of the early aughts and 20-teens.

“The first run of an IP is tough to get up and into the world, particularly when it has been dominated by a lot of existing franchises, brands and content. [“Wicked”] is fresh, new and quite exciting,” says Klaseus. “There's a lot of ingredients that have gone into it that are fueling the frenzy ... the themes, the characters and, of course, the talent. It is all really exciting.”

Orchestrating a Pink and Green Symphony

Behind each powerhouse brand from Universal is what's called the “Symphony” – a cacophony of synergistic levers within the broader Comcast NBCUniversal organization that play together to spark a marketing strategy that reaches far and wide. “Wicked” is the latest to benefit from the Universal Symphony of opportunity in arguably the biggest approach in recent history. It's why “Wicked” has been so ubiquitous during H2 this year – from your television to your social feed, on the shelf and in your ear.

Throughout the year and in the run up to the film's release, the Symphony campaign exponentially ramped up media coverage, publicity and promotion for the property, effectively supercharging all campaigns to create blockbuster moments like the first-ever coordi-



Top: LEGO “Wicked” Elphaba and Glinda figures set.

Bottom (left and center): Béis x “Wicked” capsule collection of luggage and other travel accessories.

Bottom (right): Lingua Franca x “Wicked” collection.

nated ecosystem take-over with Xfinity and SKY that was anchored by a co-branded holiday campaign featuring stars Erivo and Grande. There was also a behind-the-scenes broadcast that aired on NBC, Peacock, Telemundo, SKY and an additional 40+ international broadcasters; as well as a massive theme park activation executed during the holiday season, which Universal is calling the largest ever of its kind.

“There are a lot of initiatives battling to become Symphony priorities,” says Klaseus. “This one was a no-brainer for many reasons. We knew it was going to be something special very early on just from the way the filmmakers were [crafting] their vision. That excitement has only grown and amplified as we’ve gotten deeper into [the making of the film].

“It’s a big swing for us and one of the biggest investments we’ve ever made as a company, but we’re leaning into it from all angles,” continues Klaseus. “The Symphony program unlocks all of the assets and opens up inventory across all facets of the company.”

That Symphony means Universal is able to tap into its marketing juggernaut and showcase opportunity from every single area of its business – from this summer’s Paris Olympics, where you saw Grande and Erivo arrive arm-and-arm in emerald green and pink at the opening ceremonies, to the endless parade of network and in-person appearances, prime time content and social activity in support of the film. And don’t forget about Universal’s experience opportunity layered in with its parks and location-based offerings.

“Every single part of the company has a part to play leading into [the film premiere] and to support this, and then to fire on all cylinders at the same time is pretty powerful,” says Klaseus.

“As we’ve seen time and again, the incredible power of Symphony supercharges any marketing or franchise strategy across the Comcast NBCUniversal ecosystem,” says David O’Connor, president, franchise management and brand strategy, NBCUniversal Studio Group. “The kind of campaign we’ve created for ‘Wicked’ could only come about at a company like ours thanks to the unparalleled support from leadership and the commitment and collaboration from teams across the enterprise.”

The tightly orchestrated campaign is reaching across the globe, first rolling out in Western markets simultaneously including North America, Europe, Latin America, Australia and New Zealand, then extending to Asia in spring of 2025. Says Klaseus, Japan will also be a major focus where fan-affinity is strong.

A Product Campaign that Defies Gravity

Beyond the marketing support are the product programs that are enmeshed into the storytelling and fan experience of the “Wicked” film. And for Universal, that means launching big into every major category with partners Klaseus calls cleverly, “better, best and bestest.”

Typically, film programs (especially new IPs) use a concentric circle model for product roll-out that builds over time, launching first with the broadest categories



Left: Exclusive “Wicked” merchandise for Universal theme parks.
Right: “Wicked” x Primark.





Erivo features prominently in Target's merchandise campaign.

and partners and then expanding deeper into more specialty categories over the course of years. Not Universal and not for this program.

"Wicked" has gone to market with a curated range of products ahead of the film debut in countless categories, all with blue chip licensees that run the gamut from high-end apparel to lifestyle, beauty, food and beverage, toys and games and more.

"From the early stages, we wanted to make 'Wicked' look and feel different, and that was certainly a part of the strategy and focus," says Klaseus. "We have an elevated proposition that is focused on a design-forward, quality product propositions. We looked at the old standard of 'good, better, best' and turned it on its head a little bit to push it and make it 'better, best, bestest.' We pushed ourselves and we pushed our partners to deliver a broad array of products and programs that span from fashion runways to department stores, through mid-tier and specialty into mass. But I think no matter where we are showing up, it's really a beautiful presentation that has stayed authentic, which was very intentional."

Early assortments include a massive push with retailer Target, which becomes the "ultimate fan destination" for "Wicked" this holiday season. Launched in October with more than 150 "Wicked"-inspired items, the retailer-exclusive product program is one of the largest ever. Erivo herself kicked off the launch in-store and saw product sell-through at record speed. Products include an apparel and accessories range created by the film's costumer designer, Paul Tazewell; the Elphaba singing doll from Mattel; limited edition quenchers from cult favorite Stanley; a special version of "Wicked the Soundtrack" on vinyl; a nail polish collection with OPI; It makeup brushes for Ulta; bath, body and skin-care from Beekman 1802; and more, all featured in

branded shop-in-shops, through digital experiences and various other surprise-and-delight opportunities as the holiday season progresses.

With Starbucks, Universal paired in the U.S., Canada and select international markets to release an assortment of collectible tumblers, keychains, cold cups and more inspired by the film's characters and themes. They also launched a range of specialty beverages, all with a "Wicked" spin.

Additional partners locked in for "Wicked" are many and include lifestyle products from brands like Béis, Bombas, Eugenia Kim, Rebecca Minkoff, Lingua Franca NYC and Voluspa; elevated apparel, accessories, bags and footwear from partners including Accessory Innovations, Bioworld, Crocs, Foster Grant, Ground Up, High IntenCity, Hybrid, Kipling, Lola + the Boys, Loungefly, Mad Engine and Vera Bradley; homewares and food and beverage assortments from Bliss, Conair, Dreamtex, Lush, Makeup Eraser and Zaks; and toys and costumes in all categories with master partners Mattel and LEGO, as well as Build-a-Bear, Disguise, Fisher-Price, Funko, Hasbro, Jakks Pacific, Jazwares, Random House, Rubies and Spin Master. All of this is supported in-store by retailers from mass to class, including Aldo, Amazon, Bloomingdale's, Cotton On, El Corte Ingles, GAP, Kiabi, Kohl's, H&M, Hot Topic, Liberty of London, Liverpool, Loblaws, Marks & Spencer, Primark, Ulta Beauty, Walmart and many more.

On the fashion front, "Wicked" is leveraging that category deeply, capitalizing not only on the breathtaking costume design by Tazewell, but also the pink and green elements that shine through from the characters and the inspirational world of Oz. Fashion opportunities will span demographics, leaning in on all ages from kids to adults across every price point.

"I will give credit to my team, to our CP and retail partners for really leaning in and delivering something special for 'Wicked,'" continues Klaseus. "It's been exciting and it's really a feel-good moment ... Once people saw the IP and creative vision, partners believed in the magic of 'Wicked.' From there, the more they saw, the more they wanted and the momentum continued to build."

“We have something for everyone – that is what we keep saying,” says Klaseus. “We have something for all ages and all demographics. We feel confident and excited as we look to the future.” ©

Klaseus says “Wicked” is a nice complement to the Universal IP portfolio, rounding it out in a way that allows partners a fresh, new opportunity alongside its tried-and-true properties such as “Minions,” “Jurassic

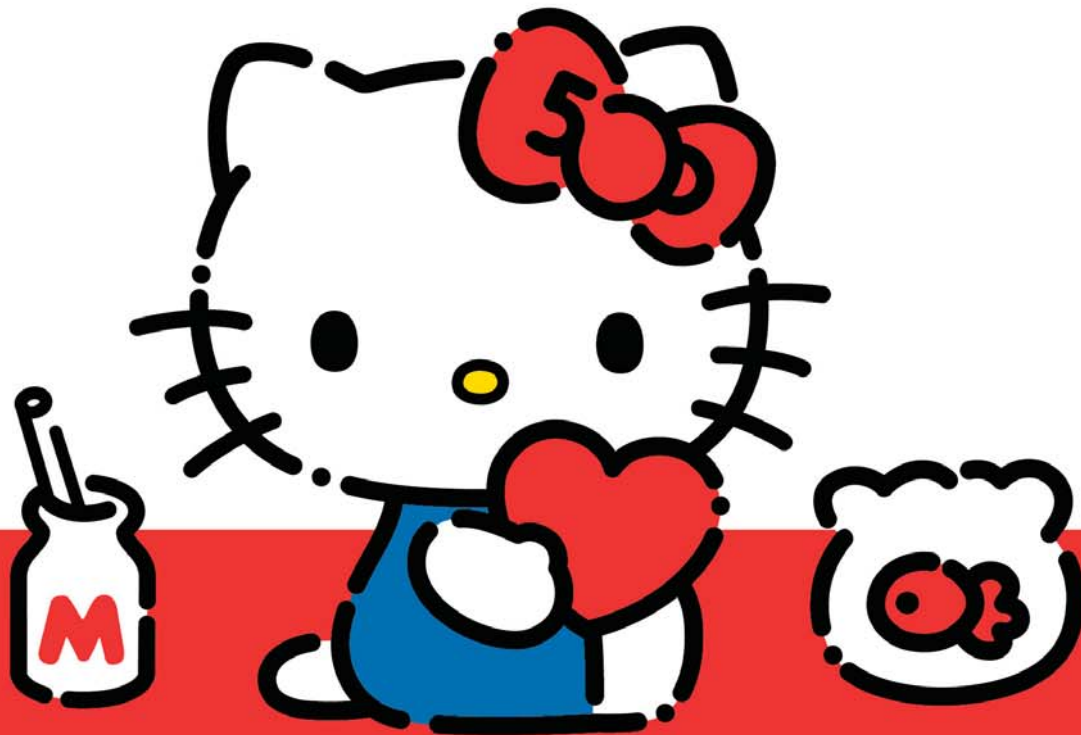
Klaseus says “Wicked” is a nice complement to the Universal IP portfolio, rounding it out in a way that allows partners a fresh, new opportunity alongside its tried-and-true properties such as “Minions,” “Jurassic

Right: Lush x “Wicked” bath assortment.



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EXPLORING THE *Funkoverse*

Funko, a pop-culture mainstay, continues to grow its collectibles universe through its new video game, “Funko Fusion.”

by GIANNA ROSENBACH



The cover of “Funko Fusion” for PlayStation 5.

WHEN IT COMES to fueling fandoms, Funko is a powerhouse licensee. Known for its extensive portfolio of collectibles, Funko has expanded its brand over the years to resonate with fans worldwide. License Global spoke with Andy Oddie, chief commercial officer, Funko, to discuss how its Pop! range of collectible figures in multiple categories fuels fandoms and share insight into the brand’s ongoing evolution.

Evolving with Fandoms

For 26 years, Funko has amassed a loyal community of collectors, creating products that celebrate fandom culture. Its signature vinyl Pop! figures, with their distinct square heads and large black eyes, have become must-haves for fans to proudly display. The modular form factor and signature aesthetic have lent well to Funko’s growth. According to Oddie, the repeatable design translates well into all the various IPs Funko partners with. The brand also aims to present its ranges collectively in Funko-branded retail statements. So, whether it’s a Mickey Mouse Pop! or one inspired by summer’s biggest blockbuster, “Deadpool & Wolverine,” it is unmistakably Funko.

Looking beyond collectible figures, Funko has apparel company, Loungefly, and pop-culture art brand, Mondo, to broaden its reach. By adding licensed accessories and apparel, and now, video games, Funko is a one-stop shop for pop-culture enthusiasts.

“Businesses like Loungefly and Mondo have significant adjacencies with our community and general objectives,” says Oddie.

Also driving Funko’s evolution is the recent appointment of Cynthia Williams as chief executive officer earlier this year. With her senior leadership experience at Hasbro and Xbox, Williams brings valuable insights from brands with dedicated fan bases. Her expertise in consumer products, gaming and e-commerce aligns well with Funko’s expanding strategy, particularly as the company scales its digital and licensed toy offerings.

Engaging Every Generation

Part of Funko’s success has come from tapping into the upswing in kidult culture. The growing trend has seen adults drive the demand for licensed toys and collectibles by reconnecting with favorite childhood memories. Circana’s toy sales report for the first half of the year across 12 global markets noted the continued strong momentum from adult consumers, particularly fans and collectors, who have rediscovered engaging in play.

Funko has mastered blending nostalgia with contemporary fandoms that appeal to consumers across generations. Whether it’s classic movie characters, favorite superheroes or tentpole events like the Olympics, Funko understands fandom transcends through generations ... and platforms.



ANDY ODDIE
chief commercial officer,
Funko

“Funko Fusion’ has the ability to broaden our reach through a new medium, and delight our core audience,” says Oddie. “By mixing popular franchises from our licensor partner, Universal, and developing a line of collectibles with our Pop! range, we’ve been able to leverage cross-promotional opportunities, foster fan communities and enhance brand loyalty.”

Entering the Gaming Realm

Of all the leaps Funko has made, perhaps the boldest has been into the digital realm with the launch of “Funko Fusion,” a collaboration with 1010 Games led by Jon Burton, the architect behind the LEGO video games. “Funko Fusion” is a multiplayer game that features NBCUniversal characters from movies like “Jurassic World” and “Back to the Future” in Funko Pop! form.

“We wanted to bring the world of Funko to life in a way that we haven’t done before, and we are hugely excited to have entered this new space,” says Oddie. “Funko Fusion has the ability to broaden our reach through a new medium, as well as delight our core audience.”

The game’s release sparked excitement among collectors and gamers alike, with Funko’s visual identity integrating seamlessly into the digital format. Looking ahead, Oddie highlights the growing importance of video games in Funko’s licensing strat-

egy, offering new ways to introduce IPs. Licensing has been central to Funko’s approach, and as the company grows, so does its exploration of new partnerships.

“The game itself allows for additional IP to be introduced ongoing, which is a unique proposition and is allied to Funko’s general IP activity within its core function,” says Oddie. “We’ll continue to explore all types of IP and have elected to index our efforts on previously underexploited pillars such as sports in 2025.”

The Funko Future

As Funko continues to evolve, its ability to blend nostalgia with cutting-edge trends like digital gaming ensures it remains at the forefront of pop culture.

“Funko will continue to explore our existing product ranges, but it is particularly important to us to expand the pillars in which we sell,” says Oddie. “This can be done both through new lines and

Funko-created content such as the activity we led on ‘Deadpool’ and Olympics.”

With a dynamic product range and strategic partnerships, Funko is shaping how fans experience and connect with their favorite franchises. As new ventures like “Funko Fusion” emerge, the brand is poised to push boundaries, redefining what it means to be a true pop-culture powerhouse for years to come. ©

Top: Funko Pop!
“Wicked” Elphaba.
Center: Bitty Pop!
Rides Harry Potter and
Hogwarts Express.



Bottom (left to right):
Loungefly’s
“Wednesday” Nevermore
Academy Castle glow
mini backpack; Funko
Pop! Shaun of “Funko
Fusion” and Loungefly’s
“It” Pennywise Raincoat
Cosplay glow mini
backpack.



The Lumistella Company

THE ELF ON THE SHELF IS SET TO *Turn 20*

The Santaverse continues to expand with new characters and adventures.

by JANE NEAL

The Elf on the Shelf Scout Elf in the city of Bristol.

HOLIDAY BRAND, THE Lumistella Company, is set to celebrate the 20th anniversary of The Elf on the Shelf next year. It all started with “The Elf on the Shelf,” a popular story by Carol Aebersold and her daughter, Chanda Bell, beautifully illustrated by Coë Steinwart. This tale features a magical Scout Elf who keeps a watchful eye on children during the day and reports back to Santa each night. Each morning, the elf returns to discover a new hiding spot, sparking a holiday tradition that engages families throughout the season. What began as a publishing venture has transformed into a powerful global brand focused on entertainment and high-quality consumer products.

In 2009, the company started its international expansion with The Elf on the Shelf in the U.K., Ireland and Canada – partnerships that continue today. Following that, Elf Pets were introduced, which include a St. Bernard puppy, an Arctic fox and, of course, a reindeer. These cuddly helpers of Santa are designed to be cherished throughout the year, unlike the Scout Elves, who, to keep the magic alive, typically return to the North Pole when the seasonal décor is packed away.

In 2023, Lumistella unveiled the Elf on the Shelf Santaverse, a storytelling universe that reveals the enchanted world of Santa Claus. The company is using its existing portfolio to launch this whimsical world and create new characters and adventures. The Lumistella Company is releasing a range of products featuring new characters, including Frost Pips, the North Pole’s youngest elves sweetly nestled in icy frost flowers; Bogie, a clever furry friend from enchanted North Pole forests and Little Grunt, a playful yeti that is part of the newly launched SnoBiggie brand.



TRACY HANCHETT
vice president, licensing
and business development,
The Lumistella Company

License Global spoke with Tracy Hanchett, vice president, licensing and business development, The Lumistella Company, to learn more about what’s new in the Santaverse.

“Frost Pips are the official baby elves from the North Pole, known for their playful spirit and captivating charm,” says Hanchett. “Give them love and care, and with nourishment from their frost flower home, they’ll be protected, and they just may one day be Santa’s Scout Elf helpers.”

There are four elf babies in the collection. The Bogie brand introduces spirited little creatures from a mountainous region of the North Pole, where they hide in nooks, crannies and cozy hidey-hole homes.

“Cute, mischievous and sweet, these North Pole residents seek out forever friends and are known for their loyalty, expressive emotions and humor,” says Hanchett. “Bogie products support imaginative play and social/emotional expression, appealing to children with a fascination for the North Pole, its origins and the magical creatures who inhabit it.”

In the lore of Santaverse, SnoBiggie yetis were once fearsome creatures hailing from a mountainous region of the North Pole, but the power of play melted their hearts, and they are now beloved toy testers for Santa. With the power

of a positive heart, they joyfully celebrate their inner child each day as they smash, crash and bash toys to ensure they are safe and fun for children.

Little Grunt, a little yeti with a big heart is available as a storybook and plush set.

The Elf on the Shelf already has a wide range of licensed products, including cereals, bedding, games, puzzles and candies. Hanchett says the company is always interested in discussing potential brand partnerships with those whose priorities align with The Lumistella Company’s to inspire joyful family moments.

“Among other exciting new licensing partnerships, in 2025, we will be expanding into the digital gaming space with two new games – one video console-based game from Outright Games and the other, an integration into Piñata Smashlings in Roblox from Toikido,” says Hanchett.

At Brand Licensing Europe in September, The Lumistella Company unveiled several new holiday experiences in the U.K. For example, this holiday season, The Elf on the Shelf Christmas Adventure will be featured at Bluewater in Kent allowing families to enjoy an immersive, 25-minute adventure as they step through the Elf Door and are transported into a North Pole-inspired world of wonder and festive play. Also, this season in the U.K., a 15-foot-tall The Elf on the Shelf Scout Elf can be found around moving around the cities of Bristol, Liverpool, and Croydon, England for during the month of December.

“We are looking forward to The Elf on the Shelf Santaverse activations at the Main Place, a Centennial, California-based mall; integration into Houston Zoo Lights event in Houston, Texas; and scavenger hunts in downtown Roanoke, Virginia and in downtown Knoxville, Tennessee,” says Hanchett. “We’ll partner again with Beaches Resorts in Jamaica and Turks and Caicos to add a tropical twist to the beloved holiday tradition, extending a personal invitation for Scout Elves to join their families vacationing in the Caribbean this holiday season. We are also planning an experiential mall-based event with our partner, Madhouse Productions, at Caleido in Madrid, Spain. Coming in 2025, we’ll launch more experiential events nationally and internationally, and we’ll be bringing The Elf on the Shelf live stage shows to select markets in the U.S., the U.K. and Australia.”

Following BLE, Hanchett says there are more opportunities to expand in the U.K. market, especially in the experiential space.

“Britons are ardent supporters of Christmastime events, and we’re working closely with our U.K. agent, Rocket Licensing, to capture new deals for 2025 and beyond,” she says.



The company has a global reach and that is growing, too. The core line can be found in 26 markets, with the strongest focus markets being the U.S., U.K., Mexico, Canada and Australia.

The Lumistella Company has licensed agent representation in the U.K., Canada, Australia, New Zealand, Mexico and Spain, and those partners are helping the brand to leverage current success and grow.

Through the years, The Lumistella Company has seen its share of successful collaborations. Hanchett says the company is focused on collaborating with creative partners who align with its corporate values and are committed to bringing the characters and stories of The Elf on the Shelf Santaverse to fans and families worldwide. Like many brands, The Lumistella Company has seen particular success in the food and beverage category.

“We see quite a bit of user-generated content that utilizes food and snacks,” says Hanchett. “With that, our consumables partnerships have always been some of our strongest performers. Notable callouts include our multiyear partnership with The Frozen Farmer for Santa’s Cookies Ice Cream and Ice Cream Sandwiches and top-performing McDonald’s x The Elf on the Shelf Happy Meal promotions since 2022 in the U.K., Ireland, Spain and Italy, and this year in Australia, New Zealand and Fiji, with more to come.”

With the announcement of The Elf on the Shelf Santaverse, the company sees even more options for growth.

“In 2025, we’re not only celebrating our 20th anniversary of The Elf on the Shelf with new products and experiences, but we also have the first of a seven-volume middle-grade novel series coming from HarperCollins and a content deal with Netflix,” says Hanchett. “All of this broadens our scope, allowing us to continue to tell the stories of Santa’s North Pole, create year-round buzz around our brands and open entirely new licenced opportunities.” ©

Center: A pink Bogie plush.
Bottom (left to right):
Elf on the Shelf x McDonald's; Little Grunt, a SnoBiggie and Frost Pips.



READY FOR *Pickup*

GoTo Foods has taken its food and beverage brands into retail with a fresh perspective.

by PATRICIA DELUCA



A collection Cinnabon-branded products.

THIS YEAR, GOTO Foods has extended some of its food and beverage brands beyond the norm through licensing. Formerly known as Focus Brands, the company, based in Atlanta, Ga., is a global multichannel food service brand. Through its affiliate brands, GoTo Foods is the franchisor and operator of more than 6,700 restaurants, cafes, ice cream shops and bakeries in all 50 states and over 60 countries and territories.

Chance are one of your senses knows the brands GoTo Foods represent: pretzel company, Auntie Anne's; soft-serve ice cream shop and cinnamon roll haven, Cinnabon; coffee brand, Seattle's Best Coffee; smoothie company, Jamba; as well as chain restaurants, Moe's Southwest Grill, McAlister's Deli and Schlotzsky's.

With such a diverse portfolio, the GoTo Foods licensing team rolled out some noteworthy collaborations this year. Auntie Anne's introduced Knead, a perfume with the scent of an Auntie Anne's store filled with freshly baked pretzels, which took social media by storm. Those with a sweet tooth rejoiced when recent collaborations with the candy brand, Warheads, extended to its cinnamon rolls and Chillatta cold drinks. Halloween revelers could dress up as a package of Cinnabon or Auntie Anne's thanks to the collaboration with Spirt Halloween.

Kerri Christian, senior vice president, international and retail channels licensing, GoTo Foods, talks about the company's planning of its licensing program – and what's to come.



KERRI CHRISTIAN
senior vice president,
international and retail
channels licensing,
GoTo Foods

License Global: What is GoTo Foods' strategy behind licensing for some of its brands?

Kerri Christian: Our mission is to expand global access points for our brands, increasing relevance and driving consistent growth while enhancing overall brand health. At the heart of this strategy is our commitment to providing consumers with more opportunities to enjoy the brands they love, all while ensuring they receive a premium experience across various formats.

We take a strategic approach in selecting partners, focusing on industry leaders with strong go-to-market capabilities in the categories we explore. Our decisions are always made with our core business and franchisees in mind; we would never pursue products or opportunities that could undermine or negatively impact our franchisees.

Our multichannel strategy offers numerous benefits, including increased brand awareness, enhanced customer loyalty, supply chain efficiencies, contributions to our advertising fund and opportunities for innovation.

How involved was the company for the Auntie Anne's perfume, which went viral on social media?

The Auntie Anne's perfume was a fantastic PR activation that truly captured attention, and we're thrilled with its success. Our multichannel brand strategy is anchored on building brand love with consumers through experiences that encourage customers to connect with our family of brands in new ways and long-term partnerships that build brand equity.

Do you incorporate flavor/taste profiles when it comes to working with another brand for licensed products?

Absolutely! We prioritize our core flavor profiles when developing licensed products. Our research and development team excels at integrating these signature tastes into innovative formats, ensuring that consumers receive the familiar experience they expect from our brands. This commitment to flavor integrity is key to delivering satisfying products that resonate with our audience.

GoTo Foods is No. 29 on our Top Global Licensors Report at \$1.5 billion in retail sales of licensed consumer products. What do you think has been the key to your success?

While we are No. 29, we are the second-largest food and beverage company on that list. Our success in licensing stems from a strategic approach to selecting the right partners and leveraging consumer insights to inform our business, category and product decisions. As we've focused on building world-class brands in F&B, we have also built a dedicated, best-in-class licensing team that manages all aspects of the process – from R&D and quality assurance to marketing, insights, business development and account management. This comprehensive approach ensures we consistently deliver exceptional products and experiences that resonate with consumers.

Jamba has done branded apparel, smoothies and cosmetics. Will there be more wellness-branded products coming out?

We're actively exploring new opportunities for Jamba in the retail space. In 2025, we'll launch a range of Jamba-branded functional health and wellness products in grocery stores. Jamba is an iconic brand that resonates with consumers, and we believe there's plenty of potential to expand our offerings in this area.

Carvel celebrated its 90th anniversary this year. Will the brand expand its licensing beyond F&B partnerships with candy brands like KitKat and Oreo?

We always look at new expressions and opportunities to share brand equity and create a unique product offering. Our focus remains on expanding our brands into categories that resonate with new and existing customers. We see tremendous potential to leverage our brands in new categories. We're exploring ways to expand Carvel's nostalgia and popularity beyond food and beverage as we recently celebrated its 90th anniversary. We'll introduce Carvel's treats into a wider array of consumer experiences by seeking partnerships that align with our values and resonate with our customers.

What do GoTo Foods Retail Channels have in store for 2025 and 2026?

We want our brands to be within arm's reach of consumers for any occasion. And that's what multichannel brand-building is all about. We plan to expand our business through new partnerships and innovative products. We're also looking to tap into incremental channels like K-12 and enhance our professional services offerings. Our goal is to enrich our portfolio of licensed brands, all supported by our dedicated team at GoTo Foods. ©

Top: Jamba Fruit-Flavored Snacks.
Bottom: Auntie Anne's collection of pretzels.



A Focus

ON U.K. RETAIL AND BRAND LICENSING

License Global speaks with Saad Usman, chief operating officer, MINISO UK, about the company's recent growth in the market and how it focuses on consumer needs.

by IAN HART

The MINISO location in Camden, London.

MINISO IS A global retailer offering a diverse range of affordable pop culture and lifestyle products, including household goods, cosmetics, toys and snacks. Founded in 2013 by Chinese entrepreneur, Ye Guofu, the brand has since evolved, embracing the key value that "Life is for Fun."

"What sets us apart is that we don't just have a few Hello Kitty or Kuromi items – we offer entire collections," says Saad Usman, chief operating officer, MINISO UK. "From food and drink to beauty, home-ware, toys, plushies and stationery, we've got everything you need in one place."

As of this year, MINISO Global has established over 7,000 stores in more than 110 countries, including the U.K., where the retailer has opened multiple stores, in locations such as the Bluewater Shopping Centre, Westfield Stratford City, Camden, Oxford Street and Shaftesbury Avenue in London in the past couple years alone, with plans to expand further.



SAAD USMAN
chief operating officer,
MINISO UK

MINISO in Brand Licensing

MINISO Global first tried licensing in 2016 and is now known for stocking products from a huge range of brands and IP, including Sanrio's Hello Kitty, Minions, Barbie, Care Bears, Disney, Snoopy, Pokémon, "One Piece" and many more.

"We stand out by offering affordable products that deliver great value, quality and a sense of fun, variety and newness," says Usman. "Our trendy items appeal to customers of all ages, particularly Gen Z, students and millennials. With so many global stores, our buying power and production strength have let us offer amazing quality at great prices. A perfect example is our exciting new Harry Potter collection that launched in October."

The MINISO Harry Potter range includes plush, scarves and accessories, tumblers and much more, all created with the consumer in mind.

"MINISO has always been ahead of the game, like when we started offering Sanrio products long before the hype around Hello Kitty's 50th anniversary this year," says Usman. "People are drawn to



the brands they love, and that pulls them in to explore our wide range of products. By staying true to quality and authenticity, we build trust, which keeps our customers coming back.

“Our customers love the thrill of surprise when they shop, especially with collectible items like blind boxes. You can also see this trend in our best-selling surprise bags and branded character surprise bags; it’s all about the fun of discovering something unexpected.”

This summer, MINISO kicked off its BT21 collaboration, with a collection in partnership with K-pop band, BTS, and Line Friends. The retailer uses these launches to drive traffic into its stores, including themed fan events aimed at engaging the consumer with special promotions, events and giveaways.

“We hosted a huge event at our super flagship store in Camden, London, complete with K-pop dancers and fun giveaways. In October, we celebrated the launch of our Harry Potter collection at our Oxford Street and Manchester Trafford stores where we invited everyone to

dress up as witches and wizards for a chance to win exclusive prizes and join in on some competitions. Plus, we’ve had Sanrio launches happening throughout the year, which were such a hit last year that we sold out.”

Affordable Consumables

With the consumer front and center, MINISO aims to appeal to shoppers that are becoming increasingly savvy and price-conscious, with its ethos of selling affordable consumables.

“We make a point to keep our prices low and regularly review them, adjusting for any savings in material, freight and duty costs,” says Usman. “In May 2023, when things were at their toughest, we went against the trend and lowered our prices by an average of 15-20% across all categories.”

Building on the October Harry Potter collection launch, MINISO dropped its Hello Kitty and Friends Christmas range in November, ahead of the festive season and aims to continue to go from strength to strength in 2025. ☺

Top (left to right): Disney’s “Lilo & Stitch” water bottles and plush and Hello Kitty cushions at the grand opening of MINISO in Camden, London.

Bottom left: The grand opening of MINISO at Bluewater Shopping Centre.
Bottom right: MINISO on Oxford St. in London.





What's Cooking

IN FOOD AND BEVERAGE LICENSING?

License Global digs into the latest food and beverage licensing trends.

by MCKENNA MORGAN

Top: Kate Spade's M&M's collection.

Bottom left: New Holland Brewing & Distilling Co.'s Dragon's Milk Dungeons & Dragons beer.

Bottom right: V8 and Grillo's Pickles Bloody Mary mix.

FOOD AND BEVERAGE licensing continues to be on the rise. Global sales revenue from licensed merchandise was up 5.3% from 2022 to 2023, according to the Licensing International Global Licensing Industry Study, signaling a growing opportunity for licensed products in the F&B market. Agents backed this up in the survey, saying that more companies are licensing food and beverage, and appetite for these collaborations is growing

among consumers. License Global's data has shown F&B as the third most-searched-for category among its audience. These data points suggest that licensing professionals not only see the space as a business growth opportunity, but consumer behavior corroborates it.

Licensing for Food

From grocery stores to meal kits and restaurants, consumers have more options than ever when it comes to licensed food products.

Co-branded sauces, desserts, frozen meals, alcoholic beverages and more are lining store shelves. New Holland Brewing & Distilling Co. announced a new Dragon's Milk product line in collaboration with Hasbro's Wizards of the Coast division to celebrate the 50th anniversary of Dungeons & Dragons. V8 and Grillo's Pickles announced a new Bloody Mary Mix, combining V8 tomato juice with a natural cucumber and spice flavor from Grillo's signature brine. Pringles recently brought back its "Hot Ones"-inspired flavors. Even upcoming IPs like "Wicked" are getting in on the F&B fun, with Absolut unveiling cocktails and experiences and Betty Crocker revealing a cupcake mix inspired by the film.



Restaurants offer themed meals or even licensed merchandise for IPs. Kura Sushi, a revolving sushi bar with locations in Japan, Taiwan and the U.S., announced a new partnership with Nintendo of America to feature the “Pikmin” video game franchise at locations across the U.S. Through Kura Sushi’s Bikkura Pon Prize System, guests can take home an array of exclusive Pikmin collectibles, including acrylic swing keychains, magnetic bookmarks and phone mounts and a rare Pikmin Trio acrylic swing keychain, available in limited quantities. Kura Sushi Rewards Members are also eligible for a Pikmin x Kura Sushi T-shirt as part of an exclusive in-store giveaway.

“We have designed the collection to enhance the dining experience and transport guests into the whimsical world of ‘Pikmin’ as they enjoy our authentic Japanese cuisine,” says Sally Kurosaki, promotions and licensing manager, Kura Sushi USA.

Meal kits and food sets also have licensed options. Williams Sonoma announced the launch of an exclusive collection with chef and restaurateur, Jean-Georges Vongerichten, including eight food products. The meal kit service, HelloFresh, tapped into “Friends” with a trifle meal kit, inspired by one of the show’s Thanksgiving episodes.

“‘Friends’ is an iconic show, and the Thanksgiving episodes are especially memorable, so recreating Rachel’s English trifle-meets-shepherd’s pie mashup



was an exciting culinary challenge for us,” says Michelle Doll Olson, senior culinary development manager, HelloFresh U.S.

Betty Crocker “Wicked” cupcake kit.

Food and Fitness

Fitness-loving consumers are turning to licensed merch to hit their protein goals, boost energy and more. Street’s Golden Gaytime has partnered with health food and supplement company, Macro Mike,

to launch a limited-edition Golden Gaytime-inspired Almond Protein Powder. C4 Energy announced a partnership with The Hershey Company, transforming well-known candy brands like Jolly Rancher, Hershey, Reese’s and Bubble Yum into a line of energy drinks, pre-workout supplements and protein powders. Fit Butters, known for its premium nut butters, worked with the team at Post Consumer Brands to create two new cashew butters inspired by Fruity and Cocoa PEBBLES cereals.

Even sport and fitness brands are extending into the F&B space. Reebok has announced a partnership with Generation Joy, to distribute Reebok-branded protein and collagen, vitamins, pre- and post-workout supplements and hydration supplements in the U.S. and Canada.

“A performance line of nutritional supplements is a natural extension for Reebok, reinforcing its commitment to sports and wellness,” says Steve Robaire, execu-



HelloFresh x “Friends” meal kit.



Reebok x Generation Joy protein powder.

tive vice president, Reebok at Authentic. “These natural extensions give way to endless licensed consumer product opportunities for food lovers, fitness lovers and beyond.”

Fashionable Foodies

Everybody needs food, and a lot of people adore food. So much, in fact, that food items have become pop-culture icons, resulting in the creation of numerous fashion collections inspired by food.

Take celebrity stylist, Law Roach, who recently teamed with Pepsi to create a fashion line.

“Working with Pepsi is an opportunity to merge two worlds I know so well – fashion and pop culture,” says Roach. “This collection is a celebration of individuality and self-expression, values that Pepsi and I both share.

Together, we’ve created a collection that will help people embrace their unique style while leaning into the history and iconic energy of the Pepsi brand.”

High-end fashion brand, kate spade new York, has also joined in on the foodie merch trend, creating accessories inspired by M&M’S.

“The M&M’S brand has long been committed to bringing people together through colorful fun,” says Jane Hwang, general manager global, M&M’S. “Partnering with a brand like kate spade new York, known for joy, and everyday celebrations, is the perfect complement this holiday season. We hope the special collection will surprise and delight our fans as they rock their favorite brands in an iconic new way.”

Pop-Tarts announced the debut of the Pop-Tarts Crunchy Poppers Pullover in celebration of the brand’s new bite-size snacks. These jackets were made in collaboration with upcycling clothing designer, Andrew Burgess of Vivid Visions.

Those who want to emulate food for the Halloween season had plenty of options this year, as well, with Spirit Halloween boasting Butterfinger costumes and Rasta Imposta releasing International Delight Coffee Creamer costumes.

By building a cultural moment or lifestyle around a food brand, companies have an opportunity to leverage consumer love for food in a whole new way. Enthusiasm for food, restaurants and more can be communicated through licensed merchandise. Not only is this a space to watch, it’s also a space the licensing industry can continue to capitalize on. ©



Celebrity stylist, Law Roach, wearing the Pepsi apparel line he helped design.

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DECEMBER 2024

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THE INFLUENTIALS OF 2024

Once again, License Global amplifies those in the brand licensing industry who have made a difference.

by BEN ROBERTS

THE INFLUENTIALS 2024 highlights the leaders reshaping the brand licensing industry, paying tribute to those who challenge norms, drive growth and lead with purpose. This year's shortlisted individuals are recognized across categories that reflect their unique contributions to the field—from the visionaries and disruptors to the brand builders and changemakers redefining what's possible.

To identify the most deserving nominees, License Global reached out to its global network with an open survey, inviting insights from across the brand licensing community. The response was extraordinary, with over 470 votes cast for a diverse group of trailblazers and game-changers—the highest engagement we've ever seen. From there, a board of editors and Global Licensing Group leaders carefully reviewed each nomination, considering not only popular votes but also the individual merits of each candidate. This selection process also included reviewing notable industry figures the survey might not have reached. In the end, a few standout stories emerged from the final shortlist: a visionary who brought a ground-breaking animated property to shelves and stage; an individual driving new ways of merging digital platforms and retail; a finance professional building community change; a creative force placing music back on the global brand collaboration radar; a behind-the-scenes leader shaping APAC's largest licensed events; and an industry veteran bringing gaming to the market in style.

We would also like to note that, this year, Informa Markets' own Global Licensing Group – owners of Brand Licensing Europe, Licensing Expo in Las Vegas, License Global and more – were the focus of some heartfelt nominations. While we would, in the past, shortlist deserving individuals, we believe that quick mention is more than enough so we can give space to the rising,

established and ground-breaking names on our final shortlists. So, a huge congratulations to Amanda Cioletti (vice president, content and strategy), Christie Ramsey (account director) and Justin Giuffrida (account executive) for their well-deserved recognitions. Among those names, most notably, was Anna Knight (senior vice president, licensing, Informa Markets) who, with her team, has led the Global Licensing Group through unforeseen global and local challenges to deliver consistent value for attendees at both Brand Licensing Europe and Licensing Expo in Las Vegas.

Each of the 52 shortlisted nominees for 2024 represents the dedication, forward-thinking and collaborative spirit that defines the future of licensing. While this year's winners are more than deserving of their accolades, the combined hard work and innovation of each winner and shortlisted executive embodies the industry's strength, resilience and limitless potential.

What Makes an Influential

When License Global launched The Influential Report, we aimed to identify the leaders, collaborators and creatives pushing the brand licensing industry forward. But we also saw an opportunity to uncover what truly defines an Influential. Through our nominations survey, we asked respondents to pinpoint the most essential qualities of an industry leader and the strategies crucial for sustainable growth in brand licensing. The responses provided a transparent, data-driven perspective on leading and driving meaningful change in the field.

When asked about the core elements of impactful leadership in brand licensing, most respondents—over 64%—emphasized the importance of honesty, integrity and authenticity. These values were seen as foundational, not only in brand licensing but in any business.

Beyond these core qualities, leadership attributes linked to a deep understanding of market dynamics were also highlighted. Responses included product innovation (47%), consumer insight (44%) and trend awareness (44%). Together, these qualities underscore the importance of a leader who understands their market and prioritizes genuine consumer connections.

Our survey also revealed that people-centric skills are crucial to leadership in brand licensing. Business and personal ethics ranked highly (41%), followed closely by people management (38%), pioneering strategies (34%) and consistency and reliability (31%). These findings indicate that influential leaders in this industry can inspire their teams and maintain a solid ethical foundation. Interestingly, the lowest-ranked qualities included professional networking, trend-setting, negotiation skills and risk management, scoring below 26%. This suggests that brand licensing leadership is more about fostering authenticity, innovation and creativity than personal influence or traditional networking clout.

Our next question explored the strategies expected to drive success in 2025, providing further insight into what the industry values in its leaders. The top strategy for success in 2025, selected by 75% of respondents, was building an authentic connection with consumers. This aligns directly with License Global’s definition of modern brand licensing as “a business model that builds on the emotional connection between buyer and brand.” Close behind authenticity, respondents highlighted the need for a deep understanding of consumer behavior (50%), integrating experiences into retail (43%), adapting to rapidly changing trends (38%) and creating progressive partnership models (35%).

These results paint a clear picture: tomorrow’s brand licensing leaders will prioritize authentic consumer engagement, embrace innovation and cultivate people-centered skills. The industry is moving away from individual influence and towards a model rooted in connection, integrity and adaptability—qualities that define a true Influential in 2024 and beyond. ©

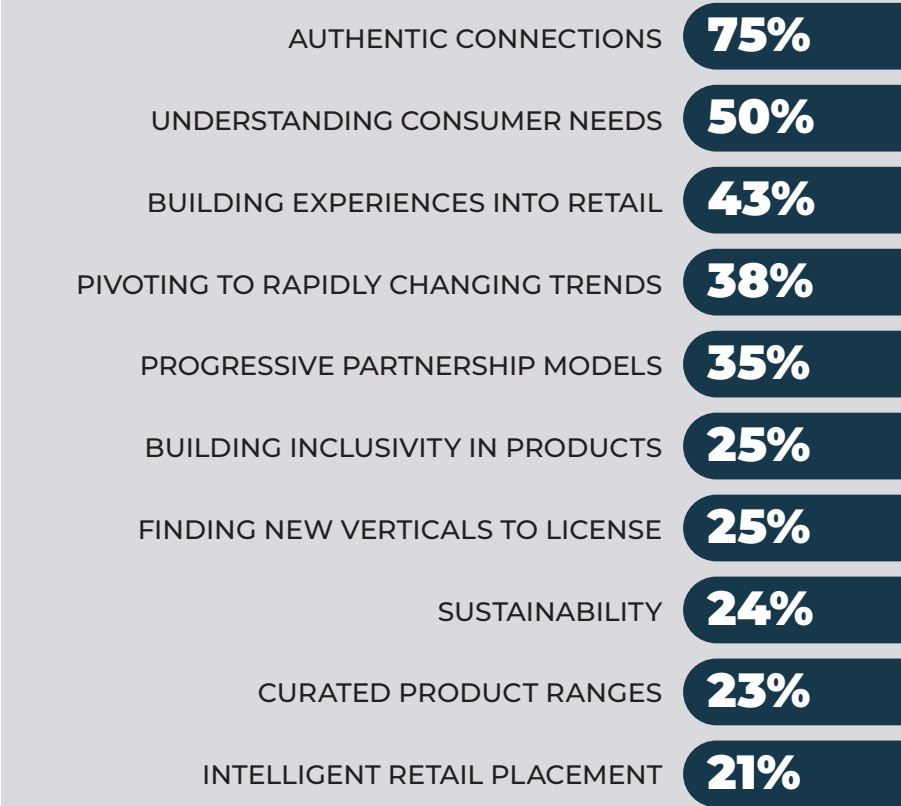
LEADERSHIP

What are the most important aspects of an industry leader?



BRAND EVOLUTION

What are the key strategies that will continue the evolution of brand licensing across the next decade?



THE INFLUENTIALS 2024

Shortlist

This year, the License Global team reviewed over 400 nominations – an all-time record – for just nine categories. We introduce the nominees:



THE INNOVATOR

Recognizes an individual advancing industry standards in areas like sustainability, business practices and product design.

NOMINEES:

- [Christian Bayley](#), global head, licensing and consumer products, Roblox
- Eric Wood, senior vice president, publishing, Scopely
- Jason Easy, vice president, global licensing, All3Media International
- Kelly Easterling senior vice president, experience design and production, and Caitlin Maloney, vice president, creative, Original X Productions
- Kim Krizelman, vice president, brand management, Beanstalk
- Le Zhang, chief executive officer and co-founder, Spaceport.xyz
- Ned Ward, associate director, marketing, planning and strategy, entertainment council, Walmart



THE CHANGE MAKER

Celebrates those who foster meaningful change, creating programs that champion diversity, inclusion and progress.

NOMINEES:

- Allana Holmes, commercial director, Hunter Price International
- April Showers, chief executive officer, Afro Unicorn
- [Emmanuel Fordjour](#), senior vice president, finance and business analytics, Beanstalk
- Kathleen Lin Wo, senior account manager, licensing, The LEGO Group
- Melissa Menta, senior vice president, marketing and communications, Peanuts Worldwide



THE COLLABORATOR

Honors leaders who have pioneered exceptional cross-category brand or product collaborations.

NOMINEES:

- Catrina O'Brien, director, U.K. licensing, consumer products, Hasbro
- Ernest Savo, senior director, global licensing and business development, The Hershey Company
- Gavin Johnson, head, licensing and new business development, Manchester City Football Club
- [Kerri Estreich](#), senior director, licensing, Sesame Workshop
- Michael Almeida, managing director, Joester Loria Group
- Philippe Glorieux, chief marketing officer and board member, Peyo Company
- Sarah Jackson, global director, license and brands, Primark



THE DISRUPTOR

Recognizes individuals who inspire the licensing community to embrace new business approaches or philosophies.

NOMINEES:

- [Damian Treece](#), senior licensing manager, Bravado International Group
- Jenn Nuccio, vice president, licensing, Innovative Designs
- Lexi De Forest, vice president, business development, Brand Central
- Ruth Henriquez, senior director, consumer products, publishing and location-based experiences, Mattel EMEA
- Todd Kaufman, vice president, strategy and partnerships, Beanstalk



THE NEWCOMER

Acknowledges emerging talents making an immediate impact in the first 10 years in their licensing careers.

NOMINEES:

- Berit Ginsberg, manager, brand marketing, King Features Syndicate, Hearst
- Elliot Stokes, manager, brand management, interactive and toy licensing, Beanstalk
- Jessica Qian, director, consumer products, China, Hasbro
- [Kyle Lerner, senior licensing manager, Brand Central](#)



THE EXPERT

Honors long-standing contributors whose careers have deeply shaped the licensing industry.

NOMINEES:

- David Gindi, president, Starwood Brands
- [Diane Bolduc, director, global licensing, toy and games, licensed consumer goods, Hasbro](#)
- John Friend, head, global consumer products, XBOX
- Liz Heard, director, retail development, WildBrain CPLG
- Michael Connolly, founder and chief executive officer, Retail Monster
- Susan Bolsover, managing director and founder, Lightbulb Licensing



THE BRAND BUILDER

Celebrates the minds behind licensed products that drive significant reach, revenue and growth for brands.

NOMINEES:

- Alexandra Sanson, senior brand manager, Magic Light Pictures
- Beth Nock, director, brand marketing, King Features Syndicate, Hearst
- David Sprei, commercial director, Penguin Ventures
- [Ernest Savo, senior director, global licensing and business development, The Hershey Company](#)
- Fabienne Gilles, chief commercial officer, consumer products and family entertainment, Peyo Company
- Françoise Guyonnet, chief executive officer, Copyrights and executive vice president, kids brands, STUDIOCANAL
- Nick McWhorter, director, global licensing, CD Projekt Red



THE INFLUENCER

Recognizes those who uplift the industry through thought leadership, mentorship and public contributions that inspire peers.

NOMINEES:

- Genna Rosenberg, chief executive officer, GennComm
- [George Wade, founder and president, Bay Laurel Advisors](#)
- Jo Redfern, independent media consultant
- Julie Turkel, founder, managing partner, Julie Turkel
- Oliver Herzfeld, senior vice president and chief legal officer, Beanstalk



THE LICENSE GLOBAL INFLUENTIAL 2024

Reserved for an individual demonstrating excellence across multiple areas, or whose work has created a transformative impact on the industry.

NOMINEES:

- Alexander Gomez, senior director, licensing and partnerships, SEGA of America
- Jill Koch, senior vice president, marketing, sales and business development, Sanrio
- Natalie Chan, director, location-based entertainment, APAC, Hasbro
- Owen Rees, group head, licensing, Games Workshop
- Ross Misher, chief executive officer, Brand Central
- [Sarah Jackson, global director, license and brands, Primark](#)
- Suzy Lee Raia, senior vice president, global consumer products, BBC Studios

THE INFLUENTIALS 2024

The Winners

The winners of this year's Influentials share what they love about licensing, how they're making an impact and what the industry needs to keep elevating.



The Innovator

Winner: Christian Bayley, global head, licensing and consumer products, Roblox



CHRISTIAN BAYLEY
global head, licensing
and consumer products,
Roblox

Formerly of Riot Games, Christian Bayley is the Global Head of Licensing and Consumer products at Roblox. Now he leads a team that builds memorable and innovative partnerships and products that empower global fans to celebrate and commemorate the millions of

experiences on Roblox. Working with the platform's unique proposition and global following, Bayley continues to build innovative ways to bridge the gap between the metaverse and the physical world through initiatives that suit the brand, the partner and the player.

“In the modern day licensing space you need to have a ***hunger for innovation***, the ability to inspire others with this vision and the partner relationships willing to push the envelope.” – Christian Bayley, Roblox

The Change Maker

Winner: Emmanuel Fordjour, senior vice president, finance and business analytics, Beanstalk

Alongside his core role, Emmanuel Fordjour has also helped spearhead the Diversity, Equity and Inclusion initiatives at Beanstalk, titled AAA, Antiracism, Allyship & Action. In the four years since the inception of this initiative, Beanstalk has diversified its talent acquisition pool, established metrics on DEI goals, created a monthly Learning Lunch series that

focuses on expanding knowledge about all marginalized groups, helped to guide promising minority-owned brands and volunteered to illustrate career opportunities in licensing to minority groups. Backed by the entire team at Beanstalk, Fordjour's self-driven initiatives continue to be more impactful every quarter.



**EMMANUEL
FORDJOUR**
senior vice
president, finance and
business analytics,
Beanstalk

“My drive to *lead by example* is motivated by the belief that my actions can inspire others, creating a positive ripple effect for the future of our industry.

– Emmanuel Fordjour, Beanstalk

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The Disruptor

Winner: Damian Treece, senior licensing manager, Bravado International Group



DAMIAN TREECE
senior licensing
manager, Bravado
International Group

Working to elevate iconic brands to new and established fandoms, Damian Treece is known for his dynamic and creative approach to consumer products; working on projects such as The Who x The Royal Mail to celebrate the institute's 60-year anniversary, build-

ing high-quality headphones with Precious Sound and The Rolling Stones and aligning brands with best-in-class partners to deliver collaborations that break new ground and place the importance of music in everyday life top of mind for consumers.

“Fans and consumers have never had more information at their fingertips or a broader canvas of brands from which to choose ... it’s imperative we craft and curate *authentic and meaningful brand experiences* that fans feel reflect their value and are worthy of their attention, energy and spend.” – Damian Treece, Bravado International Group



The Collaborator

Winner: Kerri Estreich, senior director, licensing, Sesame Workshop



KERRI ESTREICH
senior director, licensing,
Sesame Workshop

Currently serving as senior director, licensing, overseeing the management of “Sesame Street” licensed apparel, accessories, footwear, health and beauty, food, infant and on-demand businesses for the nonprofit educational organization Sesame Workshop, Kerri Estreich is the most voted individual in the history of The Influentials. While votes don’t mean a win, and any number of votes

still lands you under the scrupulous eye of the judges, Estreich’s dedication is matched only by her portfolio; having collaborated across countless household name brands to raise the profile and versatility of Sesame Workshop. Just some key collaborations include Vans, UGG, Pottery Barn Kids, GAP, Skip Hop, TOMS, Bombas, Brooklinen, Under Armor, Starface and Kenneth Cole.

“Brands are moving beyond traditional partnerships to create more *integrated, cohesive products* that offer a unique aesthetic and point of view.”
– Kerri Estreich, Sesame Workshop

The Newcomer

Winner: Kyle Lerner, senior licensing manager, Brand Central

Formerly a lifestyle buyer for licensed products at top retailers like Aeropostale, and most recently Claire's, Kyle Lerner has had immediate impact at Brand Central managing over 30 licensees for Kraft Heinz and elevating their licensed products to the next level.

Most notably, Lerner was responsible for the hit program Heinz x kate spade new york this year that generated huge buzz. Backed by her whole team, Lerner continues her successful career with the unanimous backing of her colleagues at Brand Central.

“The HEINZ x Kate Spade collection was magical because it brought together the whimsy that is Kate Spade and the irrational love of HEINZ to *surprise and delight customers* around the world.”— Kyle Lerner, Brand Central



KYLE LERNER
senior licensing
manager,
Brand Central

The Expert

Winner: Diane Bolduc, director, global licensing toy and games, licensed consumer goods, Hasbro

Formerly of The Walt Disney Company, Diane Bolduc joined Hasbro in 2019 and helped guide the brand to a new future of child and parent engagement with some of the biggest toys on the market. Spearheading substantial growth, directing key company transitions and revitalizing retro brands, Bolduc is another unanimously nominated individual for her vital work in the trajectory of one of the world's biggest toy companies. With an approach to selling toys that thinks outside the box, this market expert and industry veteran is dedicated to the world of toys and the magic they bring to every consumer.

“Managing brands in this current licensing world is fierce, but great leaders understand that *building strong partnerships* is critical.”
— Diane Bolduc, Hasbro



DIANE BOLDUC
director, global licensed
consumer products,
toy and games, Hasbro



The Brand Builder

Winner: Ernest Savo, senior director, global licensing and business development, The Hershey Company



ERNEST SAVO
senior director, global
licensing and business
development, The
Hershey Company

Ernest Savo, senior director, global licensing and business development, The Hershey Company, has been at the helm of the company's licensing division for more than 20 years. Under Savo's lead, The Hershey Company has extended its presence in the supermarket aisle and, more recently, outside most retail avenues

this year. In Jan., Falcon's Beyond secured the licensing rights to develop Hershey-themed location-based experiences both inside and outside the U.S. In Oct., The Hershey Company teamed with Original X Productions for "Hershey Super Sweet Adventure," at Chicago's Water Tower.

"For me, it's all about strategic growth that meaningfully drives *engagement and relevancy* with our brands."
– Ernest Savo, The Hershey Company



The Influencer

Winner: George Wade, founder and president, Bay Laurel Advisors



GEORGE WADE
founder and president,
Bay Laurel Advisors

George Wade, founder and president, Bay Laurel Advisors, is a leader in the location-based entertainment market and a respected voice in the brand licensing business. With more than 40 years of experience, Wade has guided Bay Laurel Advisors to become a top consultancy known for translating global brands into immersive destination experiences that engage audiences of all ages worldwide.

As senior vice president, MGM Studios, Wade established its first location-based entertainment division, leading projects that redefined brand engagement. His

work spans iconic landmarks such as Tokyo Disneyland, EPCOT Center, Universal Studios Florida and Las Vegas destinations including the MGM Grand and Luxor Hotels. More recently, George has helped shape experiences like the Crayola Experience, Cartoon Network Hotel and Angry Birds attractions at TopGolf.

Wade also serves on the Board of Licensing International, advocating for industry standards and growth. His work has paved the way for brand-driven entertainment innovations, creating new opportunities for consumer connections and elevating industry benchmarks.

The License Global Influential 2024

Winner: Sarah Jackson, global director, license and brands, Primark

Sarah Jackson, global director, license and brands, Primark, is dedicated to fostering a culture of creativity – which she believes gives the best results come from great collaboration. Her innovation to develop visionary business opportunities has helped her launch multiple licensing rollouts in several categories, including fashion, home, lifestyle and experiential retail.

Since joining Primark in 2014, Jackson has been a part of

award winning partnerships business, building market leading relationships with more than 40 global partners, with key brands such as Disney, Netflix, Universal, NBA and NFL.

This year, Jackson facilitated partnerships at Primark with new films like “Beetlejuice, Beetlejuice” and “Wicked;” classic IPs like “Shrek,” “The Grinch” “Harry Potter” and “SpongeBob Squarepants,” as well as a collab with Kappa and Hello Kitty’s 50th anniversary collection.

“Building *strong, trusted partnerships* with licensors is key ... The more we align with our partners, the better we can deliver a unique product offering that truly stands out in the market, with exclusive designs and collaborations.”

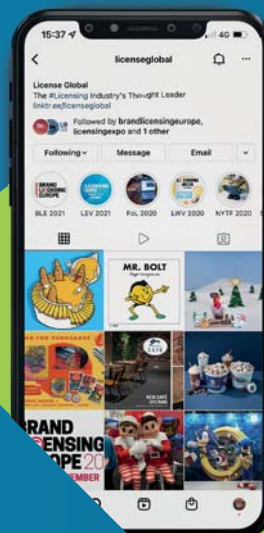
– Sarah Jackson, Primark



SARAH JACKSON
global director, license
and brands, Primark

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Toy Forecast 2025

License Global predicts which toys will make their mark in the new year.

by BEN ROBERTS



“Peppa Pig” x LEGO.

THE TOY INDUSTRY is poised for transformative growth in 2025. Fueled by technological innovation, shifting consumer priorities, sustainability initiatives and a continued rise in nostalgia-driven purchasing, major toy companies such as LEGO, Mattel and Hasbro are helping redefine the future of play for kids and adults alike. License Global takes a look at the established, emerging and forecasted trends within the toy market to uncover the impacting factors of the next 12 months.

Looking Back to See Ahead

The permeation of kidult culture defined the toys and games market in 2024 alongside trends such as the omnichannel presence of toy brands, nostalgia appeal, multi-generational cross-play and the fluctuation of consumer priorities. While countless opportunities and trends drive activity in the toys and games market, there has been no shortage of challenges as consumer confidence impacts retail sales.

Circana’s view on H1 2024 confirmed a global drop in sales by 1% and fluctuating activity across product types and toy categories. In the U.S., the market held steady,

declining just 0.4%, with three of 11 toy categories even seeing sales growth, led by building sets and primarily driven by kidult demand for LEGO Icons, driving 25% dollar growth. Explorative and other toys saw 9% growth owing to sports trading cards with the NBA and NFL, while vehicles also saw growth driven by Monster Jam.

The top 10 properties in the U.S. toy sales market were Barbie, LEGO Icons, the NFL and NBA. Jazwares held an impressive ratio of products in the top-selling toys category with Squishmallows, while LEGO, Mattel, Zuru and Pokémon played vital roles in the list.

Global activity dropped a point from January to June 2024 compared to 2023. However, momentum with older consumers such as adult fans and collectors led Circana to forecast more excitement around toys leading into the holiday season – especially across building sets, plush, robotic interactive pets and collectibles globally.

The key questions are: will the toy business maintain its course, and what trends will continue to shape the toy industry as we know it? When compiling survey data for License Global’s Top Global Licensing Agents and Top Global Licensors reports, we discovered that toys

continued to be a core part of the forward strategy for brand owners looking to engage audiences via the toy aisle next year.

In both surveys, 39.4% of brand owners and agents emphasized the continued importance of toys in the future of the \$356.5 billion brand licensing business. Toys and games have long been an essential part of the brand ecosystem, allowing kids (and now adults) to engage with their favorite intellectual properties and communities through play, fandom and collectibles.

Kidults Continue to Hold the Market

Kidult culture, a trend of fans from Gen Z to Gen X purchasing toys for themselves, has grown into one of the primary drivers of toy sales in 2024 worldwide. In the U.S. alone, adults accounted for \$1.5 billion of Q1 toy sales this year, according to Circana, keeping global decline at bay and adults engaged with brands.

43% of adults in the U.S. purchased a toy for themselves in the last year, driving new activity around brands like Hot Wheels, Pokémon Trading Cards and NFL/NBA sports cards. In Europe, adults generated over \$4.8 billion in toy purchases in 2023, with board games and nostalgia brands across the U.K., France, Italy, Germany and Spain driving a 5.5% increase in sales.

“With a passion for board games, puzzles and collections, a heavy dose of fandom and a touch of nostalgia, it seems that older kids and adults are redefining the toys market,” says Frédérique Tutt, global industry advisor, Toys, Circana. “Despite the increased cost of living, fans of toys and games know what they like and are prepared to spend money on it. To some extent, this is down to consumer groups with deeper pockets who can afford to indulge their passions, but we’re now also seeing a rise in serious toy collectors, fans of pop culture and those who take gaming, puzzling and playing to another level.”

Kidult culture shows no signs of slowing in 2025 as nostalgia, collectability and fandom surge across consumer communities and brand licensing strategies worldwide. Key brands such as Hasbro, Mattel, LEGO and more all accommodate the kidult culture with dedicated divisions and branches, such as Hasbro Pulse, a devoted fan convention that showcases new adult-first collaborations and retro-inspired toys like the highly detailed “Star Wars” Black Series. Mattel has dedicated ranges, including Mattel Creations that collaborate with artists and cultural pioneers for limited-edition collections, along with a growing and loyal fan base of adults who have grown up with the brand’s iconic toy lines. LEGO Icons, a brand for consumers age 18 and up, presents lines in collaboration with everyone from Pharrell Williams and retro automotive classics to SEGA, “Transformers” and “Lord of the Rings.”

“Adult fandom has become the fastest-growing segment of the toy market and a sector that Hasbro has continued to deliver on,” says Tim Kilpin, president, toys, board games, licensing and entertainment, Hasbro. “We believe in the power of adult fans, and you see that shine through in our 2024 product offerings, especially when it comes to brands like Transformers, Dungeons & Dragons (D&D), MAGIC: The Gathering, My Little Pony and Furby.”

Nostalgia continues to be a significant driver of toy sales, particularly with the resurgence of retro brands and reboots. The influence of millennials and Gen Xers who grew up with classic toys and are now sharing them with their children, has led to a revival of heritage IPs. In 2024, toy companies capitalized on this trend with successful reboots of franchises like Transformers, Barbie and Teenage Mutant Ninja Turtles.

Film-related licensed toys accounted for 32% of the total toy market in the first half of 2024, a 6% growth compared to the previous year. According to Tutt, much of this growth is fueled by cross-generational appeal and film-driven merchandise. The success of major motion pictures, such as “Barbie” and “TMNT: Mutant Mayhem,” pushed sales of their corresponding toy lines, and this trend is expected to continue in 2025.

“The resurgence of retro brands and film-related toy lines is not just about nostalgia – it’s about building multigenerational connections,” says Tutt. “Parents who grew up with iconic franchises like Transformers or Teenage Mutant Ninja Turtles now share these beloved characters with their children, creating a sense of continuity across generations. Additionally, the ubiquity of streaming platforms, which make it easier for families to access these classic IPs, has only amplified this trend, ensuring that toys linked to iconic films and TV shows remain evergreen in their appeal.”

The driver behind the kidult trend is more than just retro or film-related; with most brands now holding a heritage as long-standing, beloved brands, they are transforming into multigenerational touchpoints for families and older consumers looking for a dose of nostalgia. Sesame Workshop is another brand that successfully engages audiences of all ages by creating a line of baseball-inspired products with adult fans in mind.

“As a multigenerational brand, one of our priority demographics is our adult fans, and we’re thrilled to expand our range of innovative ‘Sesame Street’ products with them top of mind,” says Gabriela Arenas, senior vice president, global licensing, Sesame Workshop. “Fall is a season steeped in nostalgia, making this the perfect time of year to honor your inner child by reconnecting with the joyful classic characters of your youth. Our newest collaborations featuring iconic furry friends invite people of all ages to celebrate – or create – cherished childhood memories.”

Building on highly successful launches from the last year of new items for adult fans, Sesame Workshop, the global nonprofit behind the iconic show, continues its kidult product collaborations with beloved brands and pop-culture creators specializing in collectibles, costumes, comics and more available this fall with Funko and other brands.

As the toy industry looks to 2025, we can expect more brands to tap into nostalgia and entertainment's enduring power. According to Statista, the global toy industry is projected to grow from \$141 billion in 2022 to \$230 billion by 2030, driven by cross-generational play and retro IPs.

Play Goes Big

The power of toy brands moving into physical experiences is a growing trend that can't be understated. Toy brands increasingly turn to location-based entertainment (LBE) to expand their offerings and provide fans with immersive experiences. Branded theme parks, pop-up experiences and family entertainment centers



have become valuable extensions of toy IPs, allowing consumers to interact with their favorite toys in real-world environments.

In 2023, Mattel announced its Mattel Adventure Park, offering Barbie and Hot Wheels fans immersive, themed experiences. From Hot Wheels Bone Shaker and Twin Mill rides to a full-scale Barbie Beach House and Masters of the Universe laser tag arena, the Mattel Adventure Parks in Glendale, Ariz., and Kansas City, Kan., are set to welcome guests year-round upon opening.

"Mattel Adventure Park is an amazing opportunity to bring our beloved brands to life," says Julie Freeland, senior director, global location-based entertainment, Mattel. "Construction is underway, and substantial progress has been made on what will give fans of all ages a day of thrills and nostalgia. We're especially excited for families to experience the Hot Wheels Bone Shaker rollercoaster – a dream come true for any Hot Wheels fan."

Mattel is also building touchpoints for popular brands worldwide outside of U.S. attractions. One key example is the Hot Wheels e-kart experience, heading

Center: Funko Pop! "Sesame Street" Cookie Monster.
Bottom: Hasbro's The Gameroom.





to six cities across Saudi Arabia with Saudi Entertainment Ventures (SEVEN).

“Hot Wheels’ captures the challenger spirit, inspiring everyone to reach their full potential,” says Josh Silverman, chief franchise officer, Mattel. “This ethos aligns perfectly with SEVEN’s mission to deliver world-class entertainment that brings joy and excitement. More than just an e-karting experience, it’s a turbocharged destination for families, thrill-seekers, competitors and newcomers. We’re excited to partner with SEVEN to bring ‘Hot Wheels’ across the Kingdom.”

Similarly, LEGO continues to build on its network of LEGOLAND parks, which remain highly successful in expanding its reach with new parks opening in APAC. In contrast, Hasbro continues to create new and engaging experiences worldwide, from the Monopoly Tea Tour in EMEA to the Monopoly Steakhouse in Latin America and Planet Playskool in the U.K. on top of its existing LBE programs.

“Global Experiences is certainly a key franchise growth driver for us at Hasbro, and we’re continuing to expand in this category at a remarkable pace,” says Kilpin. “We hold 500-plus annual events globally and have 125-plus licensee-led properties open. In 2023, we welcomed over 55 million visitors to our Hasbro-branded properties. After the COVID-19 pandemic, people have been craving in-person experiences and new ways to connect with their favorite brands. This has created an experience economy, and Hasbro is at the forefront of building innovative, immersive experiences for our fans. As we look ahead to 2025, two Global Experience areas that we’re heavily investing in are retail and food and beverage. We just opened the first-ever standalone, permanent Transformers and Peppa Pig retail stores in London’s Battersea Power Station and

look forward to growing our footprint. By the end of next year, we expect to have over 250 physical Hasbro brand locations worldwide, each with dedicated retail.”

According to Market Research, LBE is projected to generate \$5.7 billion annually by 2025 for the global toy and entertainment sectors. These experiences allow toy companies to enhance fan engagement and diversify their revenue streams. More brands will likely partner with entertainment venues, using technology such as AR and VR to create more profound, interactive consumer experiences.

Toys, Games and Virtual Worlds

With over 3.4 billion gamers, gaming and its IP portfolio of detailed, immersive digital experiences continues to drive fan activity and countless hours of engagement worldwide. Players engage with these brands to escape, compete, experience, communicate and more, leading to a deep emotional connection to a video game IP that can transform any title into a global brand. Vice versa, if an established IP enters the gaming space, especially a toy or board game, the results can be equally powerful and allow fans and newcomers to experience in-depth lore and get hands-on with characters in impactful ways.

One key example of this in recent months was the smash-hit title, “Space Marine 2,” from Games Workshop and Saber Interactive, which took the profound, complex lore of the Warhammer 40K universe and transformed it into a seamless combat and cooperative experience that saw 4.5 million players within one month of launch according to publisher, Focus Interactive.

“Video games make the IP much more digestible from a licensing perspective when we can look at one element rather than the brand in its entirety,” says Owen Rees,

Left: Hot Wheels E-Kart.
Right: Furby x Cakeworthy.

group head, licensing, Games Workshop. “‘Space Marine 2’ tells the story of the legendary character, Titus, and a group of Space Marines within the Ultramarines chapter fighting against the terrifying Tyranid threat.”

Another successful title that cemented gaming’s place in our toy forecast was “Baldur’s Gate III,” which took the D&D tabletop franchise and brought it to life by simultaneously reigniting the Baldur’s Gate portfolio of video games.

Hasbro also saw a phenomenal increase in digital gaming activity in 2024 thanks to its work with Scopely on “Monopoly GO!,” a mobile game that, once again, took a beloved global board game and toy property and injected it into the digital gaming world.

“While adult fandom is certainly here to stay, we see huge potential for digital-first offerings in 2025 and beyond,” says Kilpin. “We live in an increasingly digital world, and for Gen Z and Gen Alpha, the digital sphere has become a social hub like the mall was for millennials. It’s where young people meet with friends, come into their own identity and shop, so that is where brands need to be. And there’s an appetite for this from consumers! In fact, according to a 2024 YPulse report, 70% of 13-17-year-old virtual world players (games like Minecraft, Roblox, etc.) say they like when brands open virtual stores in their virtual worlds.”

An excellent example of virtual world collaboration is the latest partnership between Gamefam, Monster Jam and Spin Master. Gamefam, a metaverse media company for Gen Z and Alpha communities, and Spin Master, a global children’s entertainment company and worldwide master toy partner for Monster Jam, announced the brand’s return to Roblox in October. This collaboration marks the third consecutive year Monster Jam will be integrated into Gamefam’s popular Roblox game, “Car Dealership Tycoon,” which has recorded over 2 billion visits.

“We’re continuously exploring innovative ways for fans to engage with the action-packed Monster Jam experience outside of the arena and the toy aisle,” says Mark Morse, vice president, wheels and action, Spin Master. “Through our collaboration with Gamefam, we’ll meet our community by delivering immersive experiences in Roblox, where fans love to hang out and play. This year’s activation features 18 iconic Monster Jam trucks, including some highly anticipated new releases that will arrive just in time for the holiday season.”

Digital gaming is not just an opportunity for brands to be brought to life in new ways but also to become translated into new digital formats for a generation of digital natives and community-driven players searching for online experiences driven by brand, retail and intellectual property.

Blending Realities

From toys moving into gaming to blending physical and digital play experiences, digitization and enhancement have been a central theme over the past few years and will continue to be pivotal in 2025. Immersive technologies such as augmented reality (AR), virtual reality (VR) and connected play experiences reshape how children and adults engage with toys.

Phygital play – a convergence of physical and digital gaming – is increasingly driving toy innovation. According to Research and Markets, the AR toy market is expected to reach \$3.71 billion by 2025, growing at a 14.5% compound annual growth rate (CAGR). Toy companies like LEGO have embraced this trend with product lines such as Hidden Side and VIDIYO, which incorporate AR to extend physical play into the digital realm.

Toy manufacturers are expected to release even more hybrid toys that fuse tactile and virtual experiences. As brands increasingly cater to tech-savvy children and adults, phygital products will likely dominate the toy market in 2025, blurring the lines between traditional toys and video games.

In addition to AR and VR, artificial intelligence (AI) and machine learning are set to become significant components of toy innovation in 2025. Intelligent toys that understand voice commands, recognize faces and adapt to children’s behavior will offer personalized and interactive play experiences. Robotics, too, will play a pivotal role, with advanced AI-driven toys capable of engaging in more sophisticated, lifelike interactions, creating deeper emotional connections with children and adult collectors alike.

A 360 Brand Ecosystem

Similarly, brands blending content and cognitive development are equally seeing a rise in engagement as brands move from the screen to the broader curriculum of childhood experiences. Today’s most successful kids’ brands don’t just create shows; they build worlds that immerse children far beyond the screen, extending into toys, live events, games and interactive experiences. Animation and content brands like “Blippi,” “PAW Patrol” and “Peppa Pig” go beyond passive viewing, crafting experiences that allow kids to connect with their favorite characters in real life every day.

“The kids’ entertainment and toy markets are influenced by shifting desires for human connection, interactive experiences and learning,” says Julie Freeland, senior director, global location-based entertainment, Moonbug. “Children do not just passively watch content; they actively engage with their favorite brands beyond a screen. Kids repetitively watch their favorite characters on YouTube and streaming platforms, but they also listen to music, play multi-player video

games, collect trading cards, attend live tours, read books and carry their favorite toys everywhere. The brands winning with consumers create multiple touchpoints for fan engagement, including consistent content, experiences and consumer products.”

Kids’ favorite shows are now the foundation of a broader ecosystem. Brands are creating collectible toys, board games, educational kits and apps that help young fans explore their favorite stories and characters through multiple touchpoints. PAW Patrol, for example, offers everything from interactive playsets to live stage tours that bring Adventure Bay’s heroes to life. This multi-platform approach turns entertainment into an interactive fan journey, where kids can go from watching a show to playing with characters and even participating in live events.

This trend is especially powerful when it meets educational and developmental goals. Brands like Blippi incorporate STEM and social-emotional learning, making playtime a foundation for skills beyond academics.

“With Blippi, we’ve built a loyal, engaged audience by creating a cohesive curriculum-based experience that connects watching, learning and playing,” says Freeland. “Whether it’s a Blippi crossover with ‘Sesame Street,’ a ‘Find Blippi’ game on Roblox or a live event, each touchpoint stays true to our mission to ignite curiosity in kids by turning real-world learning into playful adventures.”

Entertainment now means active engagement for today’s kids, a multi-sensory world that inspires them to learn, play and explore, all driven by licensed products and touchpoints. For parents, this evolution of licensed toys and content is a unique way to blend fun with learning, making play purposeful and memorable.

Toy Brands Setting the Bar

Sustainability is no longer a niche concern in the toy industry; it has become a mainstream consumer expectation. With rising environmental awareness, parents increasingly seek eco-friendly toys made from recycled or renewable materials, and brands are responding.

LEGO, for instance, has committed to producing sustainable products by 2030, including the recent launch of bricks made from recycled plastics. Similarly, Mattel introduced its Barbie Loves the Ocean line, made from 90% recycled plastic, as part of its broader sustainability goals. According to a 2023 NPD report, 32% of parents consider sustainability a key factor in purchasing decisions.

As we move into 2025, we can expect more toy companies to adopt eco-friendly practices, including reducing plastic packaging, using biodegradable materials and promoting circular business models. These efforts will likely gain traction with consumers who prioritize sustainability in their buying choices.

By 2025, sustainability will be more than a consumer preference – it will become a regulatory requirement in crucial markets like Europe and North America. Toy companies are expected to respond by accelerating their efforts to meet zero-waste goals, using biodegradable or renewable materials and cutting down on plastic packaging. These eco-friendly initiatives may give rise to a new category of toys that entertain and educate children about environmental responsibility, positioning sustainability as a key selling point in the years ahead.

Moving into 2025

As 2025 approaches, the toy industry is on the brink of an exciting new era. The intersection of technology, sustainability and nostalgia presents unprecedented opportunities for brands to engage new and returning consumers. Whether through eco-friendly initiatives, immersive digital experiences or collectible toys that span generations, toy companies are set to innovate and redefine play in ways that resonate across all ages. Amid economic challenges, those who adapt quickly and stay in tune with shifting consumer expectations will lead the charge, driving the industry to new heights.

As toys become more personalized, eco-conscious and technologically integrated, they will continue to influence broader trends in education, family dynamics and even mental well-being. The toy industry’s next chapter is about more than just products; it’s about redefining the concept of play as a lifelong journey that bridges the physical and digital worlds, fostering creativity, connection and innovation for future generations. ☺

Converse x Dungeons and Dragons sneakers.



THE X Factor

Original X Productions has transformed key properties into successful location-based experiences.

by PATRICIA DELUCA

"Harry Potter: Magic at Play" in Chicago.

ORIGINAL X PRODUCTIONS (OGX), a location-based entertainment company, made a mark in the space relatively quickly. Formerly known as Superfly X, the company has transformed popular brands into memorable location-based entertainment (LBE), igniting imaginations and captivating audiences worldwide.

OGX has produced LBEs based on NBCUniversal's "The Office," Warner Bros.' "Friends" and "Harry Potter" and its newest experience with The Hershey Company, which debuted in Chicago in October.

Stacy Moscatelli, chief executive officer, OGX, talks to License Global about the impact of LBEs, and why they should be fun for all involved.

What IP Makes for a Fun LBE?

Location-based experiences have become a global phenomenon. Cartoon characters, artists and film IPs have become the subjects of LBEs worldwide. Moscatelli says that for an IP to be an LBE that people want to attend, a few checkpoints are needed to make it work.

"We always go in thinking about the long game – what do we think the lifecycle of this IP through an experience can be," says Moscatelli. "We've historically looked at IP that we think stands the test of time. I firmly believe that 'Friends' will celebrate its 35th anniversary as big as it celebrated its 25th

and 30th anniversaries. We think that the fandom will continue to grow and maintain and flourish over time. There are some IPs that are interesting or popular, but bringing them to life through an experience doesn't always hit the mark or resonate. For OGX, it's about three things: the audience, the level of engagement and the creative opportunity for our product. There could be an active audience, but the IP may not be creatively rich enough to come to life in a physical environment."

The One with the Multiple Locations

Initially launched in 2019 as a pop-up to mark the sitcom's 25th anniversary, "The Friends Experience" (in partnership with Warner Bros.) expanded to a tour across the U.S. with stops in Philadelphia, Detroit, Salt Lake City, Boston, Miami, Chicago, Atlanta, Dallas, Phoenix, Seattle, Long Beach, Denver, Washington, DC and San Francisco.

Moscatelli and OGX developed and launched "The Friends Experience" flagship in New York City, blocks away from Monica's apartment.

"'Friends' is such a unique IP and entertainment property," says Moscatelli. "It's so beloved globally. I always credit Warner Bros. distribution arm because they did such a good job distributing and translating the show. We often hear that people learned how to speak English watching 'Friends' because it was so relatable. What has driven its popularity is



STACY MOSCATELLI
chief executive officer,
Original X Productions

that the fanbase is enormous and that the show means so much to everyone.”

“The Friends Experience” is international, with runs in Dublin, Amsterdam, Toronto, Brussels, Paris, Melbourne, Sydney and coming soon to São Paulo. The second flagship – and first international flagship – is now at ExCeL London (a pivotal city in the “Friends” universe). For Moscatelli, the show’s universal appeal comes down to a shared experience.

“‘Friends’ is about that time in your life when your friends are your family,” says Moscatelli. “If you’ve been through that, you always look back so fondly on those times in your life. It’s unique and special, and I think the show epitomizes that time frame.”

After a dose of nostalgia, you most likely want it to last long after visiting the LBE. “The Friends Experience” wraps up at its version of Central Perk, where you can order and pick up some branded coffee before heading to its gift shop, where there is branded apparel, housewares and more to elicit fond memories of the tour and series.

In 2025, the second U.S. flagship will open in MGM Grand in Las Vegas (another important city in the “Friends” world). HBO Max will stream “FAST FRIENDS, a new four-part game show that takes place in the NYC flagship in the celebrated series’ iconic sets in a fast-paced competition event. The premiere date has not yet been announced.

“You’ll see a lot of the Experience in the show as the fans complete a lot of competitions throughout the space,” says Moscatelli.

A Spellbinding Experience

In 2022, OGX introduced “Harry Potter: Magic at Play” in Chicago. Visitors can retrace some of Potter’s footsteps in discovering the Wizarding World, with activities like trying out the levitation charm, mixing potions, training for Quidditch positions and much more.

Moscatelli led the development of a new Harry Potter LBE, focusing on the franchise’s younger fanbase to serve as an entry point. With an IP that spans generations, OGX was challenged to make an LBE that engaged all fans at every age.

“We saw our space in the world as creating something for the parents who grew up with the franchise, and now they have kids that they want to bring into the franchise,” says Moscatelli. “Some visitors are familiar with Harry Potter but might have not yet read the books or seen the films, or maybe they might be on the younger end of the spectrum. How do we create something family-friendly that allows parents to share with their kids? We looked at those key core moments.”

“Harry Potter: Magic at Play” also ran in Seattle and is currently in Mexico City, with plans to expand into more regions – and the LBE will make subtle but meaningful changes.

“In further iterations, you’ll see us being even more on the playful side,” says Moscatelli. “We’ve learned how

people are experiencing this space and what they love. It’s a challenge, but for us, it was about those parents who grew up with it who are introducing their kids to the franchise, and how we are bridging that gap.”

A Treat for All

OGX, in partnership with The Hershey Company, debuted “Hershey Super Sweet Adventure” this October in Chicago’s Water Tower Place. Inspired by Hershey’s popular candies, visitors can enter a workshop on the Sweet Seekers and become Sweet Seekers in Training. Family-friendly activities include navigating a Twizzlers Pull ‘n’ Peel Maze, intensifying the flavor of Jolly Rancher candies, using “peanut butter” balls to stuff Reese’s Peanut Butter Cups, and crafts using Hershey’s Kisses.

For Moscatelli and OGX, it was a chance for the company to create a story surrounding Hershey’s consumer products.

“Hershey is well known and very much beloved,” says Moscatelli. “The brand has an active audience who engages with it through several different touch points. How do we bring that to life for a location-based experience? For our team, that was an opportunity to create a story around the brand and this narrative that made you an active participant in the experience. It’s fun, and we’re learning a lot.” ©



Top: “Hershey Super Sweet Adventure” in Chicago.

Bottom: “The Friends Experience” in Dallas.



A LIST OF UPCOMING *Brand Milestones*

Save the dates: License Global notes brands celebrating anniversaries, and which intellectual properties are entering the public domain in 2025 and beyond.

by IAN HART,
MCKENNA MORGAN
and BEN ROBERTS



What Qualifies a Property for Public Domain Status?

This chart acts as a general rule of thumb for the criteria an intellectual property must meet to enter the public domain. Copyright law is complicated, and this chart is by no means exhaustive. We suggest always doing additional research, just in case your property of choice is an exception to the rule.

UNITED STATES

95 years from publication OR Death date of author + 70 years OR 120 years from creation for corporate/anonymous IPs

EUROPEAN UNION

Death date of author +70 years (moral rights may extend in some cases)

WITH BATMAN (2034), The Joker (2035), Superman (2033) and globally renowned origin stories heading to the public domain in the future, the conversation will naturally turn to copyright protection for brands still engaging millions of fans. However, the arrival of copyrighted works to the public domain does not mean modern iterations of classic characters or properties are free to use. Nor does it impact trademark law. The public domain strictly surrounds the original iterations of each title and published works of the time.

Ensuring the authenticity and values of various IPs such as “Steamboat Willie” or “Winnie-the-Pooh” may be a new challenge for brands; however, the protection offered by trademark law and long brand histories will undoubtedly favor the licensor.

An influx of well-known, public domain properties offers independent creators more freedom to adapt a wide range of classic content while helping brands support new talent and storytellers in adapting historic IPs.

Brand Anniversaries in 2025

- Baby Shark, Pinkfong – 10
- “Back to the Future,” Universal Pictures – 40
- “Bananaman,” Dandy – 40
- Barrel of Monkeys, Hasbro – 60
- DC Comics, Warner Bros. Discovery – 90
- Disneyland, Calif., The Walt Disney Company – 70

- Elvis Presley, Authentic Brands Group – 90
- Game of Life, Hasbro – 65
- “Jaws,” Universal Pictures – 50
- “The Last Kids on Earth,” Thunderbird Entertainment – 10
- Madballs, Cloudco Entertainment
- Me to You, Carte Blanche Greetings – 30
- “Miraculous: Tales of Ladybug and Cat Noir,” Miraculous Corp. – 10
- Monopoly, Hasbro – 90
- Mr. Bean – 35
- “Nana,” Viz Media – 25
- “Oh, The Places You’ll Go!,” Dr. Seuss Enterprises – 35
- Operation, Hasbro – 60
- “Ouija,” Hasbro – 135
- Pac-Man, Bandai Namco – 45
- Peanuts, WildBrain CPLG – 75
- SEGA, SEGA of America – 65
- “The Sims,” Brandgenuity – 25
- Spirograph, Hasbro – 60
- “Tom and Jerry,” Warner Bros. Discovery – 85
- Trouble, Hasbro – 60
- United States Postal Service, Global Icons – 250
- “(What’s the Story) Morning Glory?,” Oasis, Global Merchandising Services – 30
- World of Tanks, Wargaming Group – 15
- “Zog,” Magic Light Pictures – 15

IPs Entering the Public Domain in 2025

- (U.S.) “The Cocoanuts” (1929 film)
- (U.S.) Sound versions of the Mickey Mouse cartoons “The Karnival Kid” (in which Mickey speaks his first words) and the first Silly Symphony cartoons, including “The Skeleton Dance”
- (U.S.) “A Farewell to Arms” by Ernest Hemingway
- (U.S.) “The Broadway Melody,” the second recipient of the Academy Award for Best Picture
- (U.S.) “Welcome Danger,” Harold Lloyd’s first sound film
- (U.S.) “On with the Show!” the first sound film in color
- (U.S.) “Blackmail,” Alfred Hitchcock’s first sound film
- (U.S.) “All Quiet on the Western Front” (English Version) by Erich Maria Remarque (novel)
- (U.S.) “The Sound and Fury” by William Faulkner (novel)

Versions/translations published after 1929 may remain copyrighted.

Brand Anniversaries in 2026

- Beatrix Potter, Penguin Ventures – 160
- “Calamity James,” Beano – 40
- “Dennis The Menace,” Beano – 75
- London Zoo – 200
- “Lord of the Rings” – 25
- Marilyn Monroe, Authentic Brands Group – 100
- Ninjago, The LEGO Group – 15
- Play-Doh, Hasbro – 70
- Sonic the Hedgehog, SEGA of America – 35
- Stretch Armstrong, Hasbro – 50
- “Top Gun,” Paramount – 40
- Tokidoki – 20
- Tonka, Hasbro – 50
- Twister, Hasbro – 60
- Weebles, Hasbro – 55
- Yahtzee, Hasbro – 70

IPs Entering the Public Domain in 2026

- (U.S.) “All Quiet on the Western Front” (1930 film)
- (U.S.) Disney’s “The Chain Gang” and “The Picnic” with early iterations of Pluto
- (U.S.) The earliest Betty Boop works, including “Dizzy Dishes”
- (EU) “A Death in the Family” by James Agee
- (EU) The paintings of Yves Tanguy
- (U.S.) “The Maltese Falcon” by Dashiell Hammett (novel)
- (U.S.) “The Murder at the Vicarage” by Agatha Christie (novel)
- (U.S.) “As I Lay Dying” by William Faulkner (novel)
- (U.S.) “The Secret of the Old Clock” by Carolyn Keene and the 1930’s text version of Nancy Drew (novel)
- (U.S.) “Soup to Nuts” featuring an early iteration of The Three Stooges

Versions/translations published after 1930 may remain copyrighted.

Brand Anniversaries in 2027

- Care Bears, Cloudco Entertainment – 45
- FurReal, Hasbro – 25
- Gloworm, Hasbro – 45
- Koosh, Hasbro – 40
- Lite Brite, Hasbro – 40
- Littlest Pet Shop, Hasbro – 35
- Mr Potato Head, Hasbro – 75
- The Ryder Cup – 100

IPs Entering the Public Domain in 2027

- (U.S.) Disney animated short, “The Moose Hunt,” featuring the first named appearance of Pluto
- (U.S.) Universal Pictures’ “Frankenstein” and “Dracula” (1931 films)
- (U.S.) “Cimarron” 1931 Best Picture Oscar-winner
- (U.S.) “Pardon Us” Laurel and Hardy’s first feature film
- (U.S.) “Save Me the Waltz” by Zelda Fitzgerald (novel)
- (U.S.) “The Good Earth” by Pearl S. Buck (novel)
- (U.S.) “The Waves” by Virginia Woolf (novel)
- (U.S.) “Green Grows the Lilacs” by Lynn Riggs (play)
- (U.S.) “The Road Back” by Erich Maria Remarque (novel)
- (U.S.) “The Story of Babar” by Jean de Brunhoff in its original French (novel)

Versions/translations published after 1931 may remain copyrighted.

IPs Entering the Public Domain in 2028

- (U.S.) The first “Little House on the Prairie” book, “Little House in the Big Woods,” by Laura Ingalls Wilder (novel)
- (U.S.) “Conan the Barbarian” by Robert E. Howard
- (U.S.) Some of the earliest Looney Tunes short films, including “Ride Him, Bosko!”
- (U.S.) Walt Disney’s “Flowers and Trees” (the first cartoon produced in Technicolor), and “Mickey’s Revue” with the first appearance of Goofy
- (U.S.) “Brave New World” by Aldous Huxley
- (U.S.) “Death in the Afternoon” by Ernest Hemingway
- (U.S.) “The Pastures of Heaven” by John Steinbeck
- (U.S.) Hercule Poirot detective novel, “Peril at End,” by Agatha Christie

Versions/translations published after 1932 may remain copyrighted.

IPs Entering the Public Domain in 2029

- (U.S.) “King Kong” (1933 film)
- Versions/translations published after 1933 may remain copyrighted.*

Do you have a brand or IP with an anniversary coming up? Let us know what you have planned by sending an email to news@licensglobal.com. ©



THE GEN Z *Fashion Report*

License Global analyzes the Gen Z fashion world to predict what businesses need to succeed with the demographic.

by MCKENNA MORGAN AND BEN ROBERTS

Doc Martens' "Wednesday" Jadon boots.

DEFINED BY THEIR fluidity between online and offline worlds, preference for personalization and demand for brand authenticity, Gen Z (accounting for around 25% of the world's population, according to Statista) is shaping trends in the fashion industry that will be felt for years to come.

Another powerful force in the fashion world is brand licensing, collaboration, extension and partnership, a practice that allows intellectual property to enter a creative playground of consumer products and engage audiences in new ways.

When the two combine, the results reflect the trajectory of the modern brand licensing business, a practice driven by collections, drops, creative collaboration and fan-first products that build on the emotional connection between brand and buyer.

As companies continue to seek meaningful connections with price-savvy and tech-native Gen Z shoppers (aged between 12-25), be it through sneaker collaborations or nostalgic collections, the fashion space continues to evolve, and brands are already looking for new ways to engage with a new generation of consumers.

The Trends Defining Drop Culture

Apparel and accessories have long been categories of significant importance in both fashion and brand licensing, from the logo-slapped tees of a bygone era to the trend-led retailers of today. Apparel, in fact, still plays a crucial role in brand licensing strategy, with 58% of brand owners and agents surveyed by License Global planning to include licensed apparel in their consumer outreach programs in 2025. However, the definition of apparel and accessories is evolving as Gen Z continues to drive change within the marketplace. Brands like Nike, adidas and Vans are driving significant engagement with the segment through limited-edition collaborations and exclusive product drops, creating what's commonly referred to as "drop culture." As a result, categories such as footwear have also become increasingly important in the brand licensing business, rising through the ranks of priorities to gain 29% of intent from brand owners and agents building licensing programs in 2025 according to our survey data.

However, with Gen Z's distinct preferences, categories within fashion are rapidly expanding and no longer fit within the traditional boundaries of "apparel." Ath-leisure, and particularly sports and streetwear, are increasingly important sub-sections of the fashion universe according to Gen Z. The freedom of expression offered by streetwear, for example, allows Gen Z to incorporate eclectic themes, fan elements, comfort and, more importantly, the increased focus on identity.

Nostalgia and music, two more significant verticals within the licensing and fashion markets, have once again found their footing with the Gen Z tribe as they continue to look for comfort and community-led connections with brands.

Licensed T-shirts featuring "retro" brands such as pre-social worlds like "Friends" and "Sex and the City," Y2K styles or music from the '90s is a significant escape for Gen Z. 42% of Gen Z listen to music to escape from reality according to GWI, while 37% feel nostalgic for the '90s – even though the generational window stretches from 1997-2006.

GWI continues to note that, while most of the generation was either very young or non-existent in the '90s, it's more about "vibe" than experience. The care-free halcyon days of the 1990s are a big draw for the market and something we see coming through in the brands and styles they engage with movies (71%) and music (64%) are the main drivers for that sense of nostalgia with Gen Z, leading to fashion trends such as '90s hip-hop T-shirts, low-rise and baggy jeans.

Regarding retail, "omnicommerce" is a prevailing trend. Gen Z is increasingly snubbing mainstream fast fashion for vintage shopping and finding old brands, looks and licensed goods within flea markets, vintage shops and circular platforms such as Vinted. According to Drapers, while the Gen Z market often switches between online, app and in-store, physical store locations are the leading preference for fashion shopping. More than half of Gen Z fashion shoppers in the U.K. surveyed by Drapers (53%) chose physical brick-and-mortar stores as their number one shopping channel in 2023 while online shopping fell from 45% in 2022 to 35% in 2023. This is linked to the revival of physical retail following the lockdown and the introduction of digital-native brands onto the high street, such as Gymshark, Lounge Underwear and the experimental pop-up stores of SHEIN.



Left: An outfit from Forever 21's Juicy Couture collection.

Right: Forever 21's "Mean Girls" collection.

What's more, Gen Z is seemingly immune to brands setting the trend and more engaged with "bottom-up" trends that emerge from community, identity and confidence, such as Barbiecore or Coastal Grandma according to Business of Fashion (BoF). The BoF survey – conducted with Gen Z entrepreneurs Juv Consulting into fashion trends across the age range – showed that the leading brands that support the identity-led fashion trends of Gen Z are Nike, Gucci (the only luxury brand to appear on the top 10 list), adidas, H&M, Zara, Levi's, American Eagle, Forever 21, Urban Outfitters, SHEIN, Aritzia, A&F, Vans, Jordan, Louis Vuitton, Old Navy, Uniqlo, Aerie, Under Armour and PUMA.

Brand Extensions Capturing Gen Z Attention

Gen Z, born during the late 1990s and early 2000s, has different consumer behaviors and styles than the generations before. Gen Z's tastes are traceable and specific through the influence of the digital age, and as this generation reaches adulthood, companies are pivoting to appeal to their tastes and interests. PUMA, a Gen Z favorite, spoke with License Global about the industry's challenges and how the brand continues to capture the attention of its Gen Z consumers.

"It's quite a big challenge to ensure the industry is keeping up with the constant digital evolution and the growing amount of fashion trends created by social media influencers," says Inês Vasconcelos, junior product line manager, motorsport apparel, PUMA. "The fact that so much information is available nowadays, especially online, leads to Gen Z being constantly 'thrown' into a pool of fashion ideas and influences to follow the most recent trends. At the beginning of every season, market research is mandatory to make sure PUMA is aligned with the trends our consumers are fol-

lowing, and our offer is taking into account their tastes. Currently, we noticed Gen Z prioritizes eco-friendly and recycled materials in every garment, to which we pay close attention by opting to use Refiber materials for our collections, for example. At the same time, oversized and comfortable but stylish fits are also heavily influencing this generation and, consequently, those fits are also implemented mostly in our lifestyle ranges."

Market research now has more active involvement from the consumer base. Trends, values, product reviews and more are often posted online, allowing PUMA and others to recognize trends and business practices necessary to keep engagement. Other companies notable to Gen Z, like Pacsun, also have leaned into the tools of the digital age to garner consumer engagement.

"The digital evolution has transformed the fashion industry, accelerating the pace at which trends emerge and evolve," says Brieane Olson, chief executive officer, Pacsun. "Today's consumers expect immediacy and relevance, and the key to keeping up is being able to adapt. Social media is now where trends are born and amplified, which is why we've invested heavily in digital marketing, influencer partnerships and user-generated content. At Pacsun, we are deeply engaged on platforms like TikTok, where our audience is constantly discovering new styles. The rise of e-commerce has also pushed us to innovate our digital storefronts and apps to create shopping experiences that are as seamless as possible. Retailers need to do more than just create clothes, they need to create opportunities to engage with consumers in real time, meeting them where they are and making fashion an interactive part of their lives."

"Influencers shape Gen Z's fashion by bringing authenticity, inspiration and desirability," says Ryan Immegart, chief marketing officer, Liberated Brands, owner of RVCA. "Alexis Ren is a great example. Her journey into surfing has inspired her style and ultimately lead to this collaboration. Gen Z values influencers who share real stories and lifestyles, making their fashion choices feel relatable and aspirational. The digital space has made fashion immediate and interactive. Platforms like Instagram and TikTok allow trends to spread quickly, with influencers showing how products fit into real life. For Gen Z, it's not just about following trends; it's about discovering pieces that reflect their individuality."

How to Create Opportunities to Engage with Consumers

Both Pacsun and PUMA have seen success with Gen Z through their licensed collaborations.

"Our collaboration with F1 has been a big success with Gen Z," continues Olson. "The intersection of fashion and motorsport culture, combined with the

Gap x Cult Gaia collection.



PHOTO CREDIT: GAP



excitement of events like the Austin and Las Vegas Grand Prix, speaks directly to their love for experiential trends. Another major hit has been our collaboration with The Wild Collective for an exclusive MLB collection, which has tapped into Gen Z's passion for sports and streetwear. These collaborations align with what Gen Z values most – bringing it back to authenticity, cultural relevance and a connection to the experiences that shape their world. By tapping into these cultural touchpoints, we can deliver products that capture their attention and truly resonate.”

Motorsport launches are also popular for PUMA “BMW-related launches are received quite well by our consumers, especially if these are connected with special dates or events,” says Vasconcelos. “For example, [the] art cars collection, both Lichtenstein and Calder, have been a great hit this year, bringing a lot of momentum to these collaborations between PUMA and BMW, with exclusive pieces.

“On a wider view, the ASAP Rocky x PUMA Sport-style collaboration and the first F1 lifestyle collection focused on the Gen Z consumer and young audiences are also great examples of successful product launches. The success of these might be due to their focus on the younger generations, who are heavily influenced by social media personalities and TikTok, platforms where PUMA is also very present.”

Pieces inspired by sportswear, whether athleisure or streetwear, have taken over the Gen Z fashion zeitgeist. This includes brands like Nike, adidas, New Balance, lululemon, Converse and Vans. A survey from Bernstein revealed that Gen Z buys sportswear above all other types of fashion, meaning the sports-inspired trend is here to stay.

To marry classic IP and sportswear, Disney and lululemon recently launched a limited-edition collection. Inspired by archival Disney graphics, the collection features modern and elevated takes on imagery of Mickey Mouse and Minnie Mouse. The collection

includes tank tops, pants, jackets, shorts, hoodies, crews, belt bags and bucket hats.

“We’re excited to partner with Disney on a limited-edition collection that is centered on celebrating joy, movement and wellbeing – values that are shared by both our brands,” says Michelle Davies, senior vice president, global community, lululemon. “Our team was inspired by archival graphics to create a collection that naturally integrates the magic of Disney with the high performance of lululemon. With the help of our ambassadors, we are delighted to bring the ‘Happily Ever Active’ spirit to our guests worldwide.”

Piper Sandler’s 2024 Generation Z survey, ranking top brands for Gen Z, found that lululemon ranked No. 3 in apparel amongst teens. The No. 1 favorite brand was Nike; New Balance was No. 3 for upper-income teens and doubled its mindshare to 8%, and for females, adidas had the most significant increase, to 14% from 3%. This data points to the sportswear trend’s upward trajectory for future trend forecasting.

Another trend that’s here to stay is the impact of the influencer. A survey from Traackr found that 63% of shoppers say they’re more likely to buy products from an online influencer they trust. This influence from the digital age, the power of brand extensions and the overarching trend of sportswear has led to many fashion brands capturing the attention of Gen Z. Case and point: Alexis Ren, an influencer, actress, model and fitness enthusiast, is the new face of RVCA. Ren will launch a co-designed collection with RVCA next spring, leaning into all these Gen Z-grabbing trends.

Accessory Maximalism

Apparel isn’t the only kind of fashion driving Gen Z’s spending. Footwear is also a huge touchpoint. In 2022, L.E.K. Consulting noted the most sought-after footwear brands for both men and women in Gen Z, with brands like Crocs, Timberland and Dr. Martens cracking the

Left: PUMA’s A\$AP Rocky collection.

Right: lululemon’s Disney collection.



Fenty Beauty's makeup inspired by "Arcane."

top five for the casual footwear category, and Nike, Brand Jordan, Vans and adidas cracking the top five for the athletic footwear category.

These brands have also found success through licensed collaborations, with Dr. Martens x "Wednesday," Squishmallows x Crocs and Timberland x "Ghostbusters" making recent headlines.

Also notable in fashion are accessories like jewelry, bags and belts. Like many Gen Z trends, accessories have reached Gen Z's hearts via TikTok. Jane Birkin, British-French actress and singer known to be the muse of the Birkin bag, went viral for having had an eclectic, worn look to her handbag, complete with multiple adornments. The result was what WGSN called "chaotic customization," a trend inspired by maximalist aesthetic tastes and a desire to show off favorite IPs and personality traits. Think of as many keychains, stickers, patches, bits and bobbles as possible.

Some recent launches leaning into this trend include Claire's x Hello Kitty 50th Anniversary, Sprayground x The Met and Glomesh x PAC-MAN.

Gamifying Beauty

Another fashion staple for Gen Z is the cosmetics industry, with makeup used as another self-expression tool. Statista reports that Gen-Zers spend more than \$2,000 annually on beauty products.

A trend emerging in the licensed cosmetics industry is the usage of video game IP. Lab42 Market Research

found that 90% of Gen Z'ers play some type of video game. They are also the most engaged generation, with 48% playing once a day or more and 29% playing for more than four hours a day. With this IP love, brands like Fenty Beauty have cashed in on Gen Z's dual appreciation for gaming and self-expression.

Fenty Beauty recently partnered with "Arcane," Riot Games' first animated series based on the video game "League of Legends." Fenty Beauty designed each character's makeup looks seen throughout Season 2 and released a collection of limited-edition "Arcane"-inspired products for players and fans.

"Generally speaking, Gen Z loves being bold, celebrating individualism and defying the rules," says Ivory Jones, director, global consumer products, Riot Games. "Our partnership with Fenty Beauty celebrates the strong women of 'Arcane' with products for people of all skin tones."

Fenty is one of many brands following this trend. For the last few years, makeup brands have leaned into video game IP, with some highlights including Revolution Beauty launching a collection inspired by "Fortnite" in 2023 and ColourPop Cosmetics launching an "Animal Crossing" collection in 2021.

The Importance of Customization

Beyond favorite IPs, Gen Z wants to reflect every part of who they are in their purchases. Whether apparel, footwear, accessories or beauty, selecting partnerships that align with Gen Z desires is a challenge, but leaning into their values is a good place to start.

This year, Edelman released a report, Winning with Gen Z: Embracing Intention and Values for Brand Success, that showcases what the demographic is like, and what they're looking for.

"Gen Z is opinionated and vocal, shaped by the seemingly unprecedented number of challenges facing the world today," says Amanda Edelman, chief operating officer, Edelman Gen Z Lab. "This vocalness can intimidate companies; for some, communication paralysis manifests, making it difficult for companies to commit to actions that earn and maintain the generation's trust. Yet, brands cannot afford to bury their heads in the sand. Gen Z makes up 40% of the consumer market worldwide and wields tremendous influence over every other generation, across not just what we buy but how we live and what we believe. This relationship is bidirectional, with Gen Z trusting businesses more than any other institution. Gen Z looks to brands beyond just a transactional purchase; they use brands to express who they are, connect with similar people and determine who they don't share values with."

Brands are garnering consumers by combining as many trends as they can through brand extension. Take

NASCAR, leaning into the sportswear and values trends by partnering with LegacyHistoryPride, a brand known for celebrating Historically Black Colleges and Universities through fashion.

“This collaboration goes beyond products – it’s about amplifying, celebrating and honoring the schools that have profoundly impacted countless lives,” says Tahir Murray, chief executive officer, founder, LegacyHistoryPride. “We view this partnership as a chance to share our commitment to creating opportunities and building stronger communities through the lens of fashion.”

Gen Z’s innovation, mixed with their hunger for brand connection and brand familiarity, is shifting the fashion industry to be more diverse than ever. Combining vintage-inspired pieces with the effortlessness of sportswear, the influence from the digital age and a desire for the personalized, fashion brands must be willing to innovate to keep up with the newest generation with spending power.

Luxury Brands and Gen Z Fashion

Cerulli Associates, a market intelligence company, found through Gen Z owns only 9.4% of the total wealth in the U.S., Gen Z still spends their money on luxury items. Statista found that Gucci, Louis Vuitton and Dior were the top three brands favored by U.S. consumers in the millennial and Gen Z age groups. Luxury brand, Vivienne Westwood, resonated with nearly one-third of U.S. and U.K. Gen Z consumers. Regionally, among Asian consumers, Chanel, Hermès and Dior have retained their popularity with younger generations.

Even with the cost of living increase a hot economic topic, a recent report by Bain & Company found that Gen Z consumers will account for nearly a third of luxury purchases by 2030. Brand names are important to Gen Z, but less than past generations. Claire Tassin, retail and e-commerce analyst, Morning Consult, told Yahoo Finance that Gen Z consumers are not as brand loyal as older consumers, and luxury to them is about experience over status. The only brands this generation will stay loyal to are ones that are able to push a message that allows the brand to become part of an individual’s identity. To capture a consumer and keep them, luxury fashion brands are now selling a lifestyle above all else.

Another way brands capture Gen Z consumers are intertwining the brand with the consumer’s identity is through – you guessed it – licensed collaborations.

LVMH, known as the owner of brands including Fendi, Céline, Tiffany & Co., Loewe and Louis Vuitton, recently tapped popular rapper and record producer Tyler, The Creator for a collaborative collection. It’s notable here that the musician, real name Tyler Okonma, owns his own high-end fashion label popular with Gen Z, GOLF le FLEUR*. For even more fan involve-



ment, Okonma spotlighted Louis Vuitton through the creative lens of the American rapper and long-time friend and collaborator, Pharrell Williams.

KITH, another high-end brand leaning luxury, has also relied on product collaborations for additional engagement. Some recent collaborations include the New York Knicks basketball team and numerous Marvel IPs. For the Marvel collection, KITH reimagined archival Marvel illustrations, graphics and logos to create elevated apparel styles, accessories, home goods and collectibles.

“Our continued partnership with KITH presents our latest collaboration, one bringing Marvel’s 85th anniversary to life with a fashion-forward collection,” says Paul Gitter, executive vice president, global brand commercialization, Disney. “Marvel and KITH share a similar ethos that places both brands at the center of cultural influence and as driving forces in the lifestyle space. Our global collaborations offer consumers unique and modern product offerings that set us apart in today’s market.”

Disney-owned Marvel has gotten some luxury love, but classic Disney IP has also made its way to the luxury market. No matter the price point, Disney-owned IPs have continued to be popular. For example, Coach New York released a collaboration inspired by Mickey Mouse and Friends recently. From bags to jewelry to keychains and more, Coach leaned into the love of classic Disney IP to market itself more to its consumers. Beyond Disney IP, Stuart Vevers, creative director, Coach New York, says that customization is what is now defining value, and that customization recently inspired Coach’s spring collection.

“So many elements of this collection come down to personality,” says Vevers. “We’ve taken very archetypal pieces and made them unique to the wearer, with the proportions, with the styling and with very playful embellishments that call into question the idea of traditional ‘luxury.’ I think what’s more valuable today is something that’s personal.”

Tyler, The Creator’s Louis Vuitton collection.

Luxury resale retailer The RealReal's 2024 Luxury Resale Report notes that personalization and appealing to identity and style creation has allowed certain brands to flourish.

"Fashion is undergoing a seismic shift," says Rati Sahi Levesque, president, The RealReal. "Trends less frequently flow from the top and are now emerging from the ground up through things like TikTok, television shows and everyday street style." Levesque also notes

Coach New York's spring 2025 runway.



that cultural touchpoints are "driving demand for unique, high-value items that reflect [Gen Z's] personal style."

Gen Z values uniqueness and therefore craves personalized fare. Luxury items appealing to this generation must be tailored to their expectations on quality, value and interest to keep them captivated.

Fashion Retailers as Gen Z Consumer Drivers

According to the 2024 License Global Leading Licensees Report, retailers have seen an increase in activity from consumers through both brick-and-mortar and e-commerce channels. A variety of these retailers have captured the attention of Gen Z. Gen Z consumer favorites include online retailers like SHEIN and Cider, sustainable picks like Reformation and Madewell, and mall giants like H&M, ASOS, Zara and Forever 21.

A 2023 survey by Statista noted that Forever 21 was the most popular clothing retailer in the U.S., with over half of respondents saying they liked the brand.

"Gen Z uses fashion as a means of self-expression and like to change up their look dramatically, even within the course of one day," says Masako Konishi, chief merchandise officer, Forever 21. "At Forever 21, we aim to inspire our shoppers to have fun with fashion and embrace whoever they want to be – whether that's being preppy by day and edgy by night. With Gen Z, we try to meet them where they are; for example, the cultural zeitgeist of music festivals where we have worked closely with Rolling Loud and Governor's Ball to activate with capsule collections and on-site pop-up experiences. We also drive collaborations with beloved brands and creators and offer the fashion they seek at the price points they love."

In order to continue getting the attention of consumers, Forever 21 has adopted an omnichannel strategy that pulls from the strengths of multiple shopping channels. That way, Gen Z can get whatever they want from wherever they are. Additionally, it makes it easy for its consumer base to shop via social media with the help of influencers.

"Today, many customers start their shopping journey on social media (e.g. TikTok and Instagram)," says Konishi. "At Forever 21 we partner with social influencers to place our product stories in front of the right customers and then make it seamless to shop our app, website or store. This omnichannel strategy includes personalized multi-channel communication, faster checkout, a buy online/pick up in-store option, ship to store and a cohesive consumer journey."

Konishi says that a macro trend driving the fashion industry is Gen Z's love for dressing for specific occasions, where they "eventize" different moments in

their lives, constantly tailoring their style and experimenting with new trends. By offering them these trends, Gen Z can find their own personal styles and feel free to experiment with lower-priced fare as they feed into Forever 21's ecosystem. Another ecosystem feeder for Forever 21's Gen Z consumers is licensed partnerships. These partnerships often have multiple purposes for the consumer: they connect them to their favorite IPs while allowing them to participate in the latest fashion trends. For example, Forever 21 recently released two collections inspired by Y2K fashion: one for the 20th anniversary of "Mean Girls" and one with Juicy Couture.

"Recently, to celebrate 'Mean Girls' Day and the 20th anniversary of the beloved movie, Forever 21 launched a limited edition fashion collection that paid homage to the film, alongside a co-branded Juicy Couture collection, both reviving iconic Y2K fashion looks," says Konishi. "The collections were fan must-haves, with items selling out quickly and high consumer engagement on social media. Offering our shoppers relevant co-branded collections allows us to be part of meaningful cultural moments while delivering fashion at an incredible value."

Other retailers like GAP have collaborated to bring in younger consumers, with collections like GAP x Cult Gaia leading the charge.

"This collection with Cult Gaia is a beautiful reimagining of Gap icons with a partner who shares our obsession to product detail," says Mark Breitbard, president, chief executive officer, GAP. "Every piece was created

with intention with a focus on fabrications, hardware and stitching. We are delivering elevated designs and fresh fits that our customers can cherish forever."

Cult Gaia, a Los Angeles-based lifestyle brand known for high-end clothing, accessories, shoes and swimwear, leans on modern, sculptural designs, which has garnered it some loyal fans. With the help of GAP, Cult Gaia landed in the hands of more consumers.

"Reimagining GAP's classic icons through Cult Gaia's lens has been an amazing journey," says Jasmin Larian Hekmat, founder, designer, Cult Gaia. "The collaboration brought together GAP's classics and everyday wearability with Cult Gaia's sculptural and artistic approach, merging our two distinct creative forces. Each piece in this collection is thoughtfully designed to inspire creativity, blending art and function in a unique and timeless way."

What Gen Z will choose to spend their money on varies, but Statista notes that the average annual expenditure on apparel and services by Gen Z in the U.S. in 2022 was about \$1,200. Comfort was voted the most important criterion when choosing apparel in 2023, at 57%, followed closely by quality. Gen Z were most likely to purchase apparel from big-box stores, but this was at a lower share than older generations. Even though the survey found that Gen Z's fourth most shopped store type was specialist fashion stores, they were likelier to buy from a specialist fashion store than previous generations.

Gen Z's love for omnichannel options, social media connection, customization and fandom will continue to shift the retail market as they garner more spending power. ©



Items from the Glomesh x PAC-MAN collection.

READY FOR THEIR *Close-Up*

How celebrity beauty lines have redefined the cosmetics space.

by MCKENNA MORGAN

IF YOU WALK into a makeup specialty store, a department store or a drugstore, you will be inundated with many celebrity beauty brands. From makeup to skincare to hair care, celebrities are tapping into their fanbases to capitalize on their iconic looks.

Celebrity beauty products are nothing new. Iman Cosmetics, launched in 1994 by supermodel Iman Abdulmajid, is widely considered as the first celebrity makeup line. Elizabeth Taylor launched her first perfume, White Diamonds, in 1987, and it is still on the market today. In the early 2000s, celebrities including Britney Spears, Mariah Carey and Christina Aguilera introduced branded perfume lines.

Arka, a player in the packaging industry, recently released a study noting the top ten most successful celebrity-owned businesses by both online search popularity and revenue. Of those businesses, seven were beauty brands. Among those on the list were Selena Gomez's Rare Beauty at third; Rihanna's Fenty Beauty at fourth; Jessica Alba's The Honest Co. at fifth position; Scarlett Johansson's The Outset in sixth; Lady Gaga's Haus Labs at seventh; Ariana Grande's beauty and body care line, including r.e.m. beauty and God is a Woman, at eighth; and Jennifer Lopez's JLo Beauty rounding it out.

In a separate study, Arka noted the 10 most successful celebrities under 30. Seven of these celebrities (Kylie Jenner, Gigi Hadid, Kendall Jenner, Millie Bobby Brown, Charli D'Amelio, Naomi Osaka and Addison Rae) had beauty lines or licensed beauty collaborations.

"These young celebrities exemplify how modern fame extends beyond traditional entertainment, with many successfully launching businesses that reflect their brands," says a representative for Arka in a statement. "The drive to create lasting impact is evident from beauty and fashion lines to skincare and beyond. This approach enhances their public personas and establishes them as savvy entrepreneurs, setting a new standard for celebrity success in the digital age."

Celebrity Beauty as Billionaire Makers

Selena Gomez, actress, singer, producer and founder of Rare Beauty, recently made headlines as the latest celebrity to crack the billionaire's club. With an estimated \$350M annual revenue, Rare Beauty was a large percentage of why she was able to have this accomplishment. Rihanna, a singer, actress and billionaire known for her Fenty Beauty makeup line, made more than \$600M in revenue for the brand in 2023, according to Statista. Rihanna also owns the Fenty Skin and Fenty Hair brands. Kylie Jenner, reality TV personality and founder of Kylie Cosmetics and Kylie Skin among other business ventures, shares billionaire status with her sister, Kim Kardashian, who recently re-released her beauty line, now called SKKN by Kim, formerly KKW Beauty.

Another notable celebrity billionaire is Taylor Swift. Swift teamed with Elizabeth Arden over the years to release multiple fragrances. Expired bottles of the original Wonderstruck by Taylor Swift fragrance, discontinued in

Blake Lively in a promotional photo for her Blake Brown haircare line.

PHOTO CREDIT: GUY AROCH

2014, sell for upwards of \$1,000 on eBay. Though no longer sold in stores, the impact of the fragrance line remains amongst her fans and consumers have started an online movement begging for a relaunch. The Financial Post notes that in 2013, Wonderstruck raked in \$27M alone. Though \$27M is a small sum to a billionaire, the line of fragrances was a starting point for Swift's financial success.

Celebrity Beauty Brands in Licensing

Name a celebrity, and they may very well have a beauty brand: Dolly Parton, Beyoncé, Blake Lively, Drew Barrymore, Halsey, Harry Styles, Tracee Ellis Ross and Alicia Keys are just a few. However, celebrity beauty brands are not created equally; each celeb has used their brand to tout a different promise to its consumers; for some, that includes licensed collaborations to further solidify that brand outside of the image of the associated celebrity.

Kylie Cosmetics has done licensed collabs by leaning into the image of Kylie Jenner as a celebrity and the image of specific IPs. Jenner has collaborations with friends and family including her mother, Kris, her daughter, Stormi and her best friend, Stassie. Still, she has also ventured into licensed IP with the likes of "The Wizard of Oz," "Nightmare on Elm Street," Batman and more.

Selena Gomez's Rare Beauty has only done one licensed makeup collaboration thus far: "Only Murders in the Building." The collaboration touted a liquid blush and a tinted lip oil that Gomez's character, Mabel Mora, wears on the show. Rather than leaning into Selena the celebrity, Gomez leaned into the Hulu show's success and her involvement in it to give licensing a try.

Then there's Ariana Grande's r.e.m. beauty, which recently revealed a collaboration inspired by "Wicked." As both an established IP with a dedicated fanbase and an IP that Grande was directly involved in honoring (the Broadway musical was recently turned into a film in which Grande plays one of the lead characters), r.e.m. capitalized on the film's hype from Broadway fans and Grande fans alike in a unique yet authentic way.



Celebrity Beauty: What's On the Horizon

Expect more partnerships as celebrities hone in on what licensed collaborations work for their brands.

In 2024, celebrity brands grew 4.1% and health and beauty grew 6.3% from 2023, according to the Licensing International Global Licensing Industry Survey. According to a 2023 report from Licensing International, "post-pandemic, the name of the game across all beauty categories has been a shift to maximalism, marking a return to glamor and lifestyle self-expression, and amid the surge in sales of fragrance and beauty products, many companies are expanding their foundation in licensing." They also noted that the industry was 40% higher in 2023 than in 2019.

Piper Sandler's recent survey concluded that Gen Z's core beauty wallet reached the highest level since spring 2018 at \$342 (+6% year-over-year), and fragrance is growing the fastest at +25% year over year.

With the beauty industry growing, licensing opportunities abundant and celebrity billionaire statuses being reached, we will continue to see more celebrity beauty brands launched. Who amongst those new launches will succeed in this space? We will have to wait and see. ©

This year, Dolly Parton debuted a cosmetics line, Dolly Beauty, with Scent Beauty,



Left: Beyoncé's hair care line, Cécred.

Right: Fenty Hair, launched by Rihanna.

HAPPINESS AND JOY FROM A 'Smurfy' PERSPECTIVE

Peyo Company's The Smurfs builds on its brand heritage through innovative collaborations that align with the company's values.

by AMANDA CIOLETTI AND ALEX MARKOVICH



The Smurfs x ...Lost collection.

THEY ARE LITTLE, blue and a firm part of the modern cultural zeitgeist. For 66 years, The Smurfs franchise, owned by the Peyo Company, has steadily captured the attention of audiences for generations. As an evergreen brand with a rich history of entertainment and publishing to draw from, product categories have long featured The Smurfs, whether via licensed merchandise such as toys, games and fast-moving consumer goods.

"The Smurfs was created by Peyo in 1958 and they first gained popularity in Europe through comic books, figurines and advertising campaigns for several brands," says Fabienne Gilles, chief commercial officer, consumer products and experiences, Peyo Company. "Peyo loved to see his drawings come to life and become real objects in the early years of merchandising. The merchandising and international development was from the start an essential element of Peyo's vision, as he was also professionally interested in advertising and promotion, and not only the art. Peyo was dedicating two to three hours a day to European merchandising, a precious time that he couldn't spend on his main activity: the creative side of telling stories and drawing comics and cartoons. But he was convinced that it was



FABIENNE GILLES
chief commercial officer,
consumer products
and experiences,
Peyo Company

an important part of the job. Through time and over generations, we as a studio and a company have followed Peyo's vision and legacy to continue developing new content and art, along with developing the business of licensing, which carry on the values of The Smurfs."

In recent decades, fashion brands and retailers like PUMA, Supreme, Emporio Armani, Zara, Chinti & Parker and many others have taken notice of its innovative collections that define product trends and attract new audiences. But how is the company

staying ahead of the curve and succeeding in crowded categories year-over-year?

The Key to Success: Authentic Brand Values

Peyo Company gave License Global a glimpse into The Smurfs' approach to licensed products. One element of the strategy stood out above the rest – the determination to adhere to Peyo Company's authentic brand values.

It took persistence, creativity and, of course, a deep fan connection with the brand to execute one of the biggest partnerships to date for The Smurfs with the Italian fashion house, Emporio Armani.



MARIE VAN BUGGENHOUT
senior licensing
manager, Peyo Company

“I think that my favorite fashion collaboration is the one with Emporio Armani,” says Marie Van Buggenhout, senior licensing manager, Peyo Company. “It has been a long journey to make this partnership happen, but I’m very proud of it because it is unique and aligned on our common values.”

Launched first for winter 2023 and followed up with a second collection for spring/summer this year, Emporio Armani paired with The Smurfs to bring to market an array of apparel and accessories, including T-shirts, soft jersey tracksuits, caps and sunglasses for boys and girls. The summer ’24 Armani offerings also include eyewear made from materials with sustainable characteristics (nylon fiber and rubber, which are both partially bio-based).

The collections, while on-trend and of-the-moment, also speak to one of the core values of The Smurfs, and by extension, Peyo Company – environmental responsibility. While many companies have recently embraced sustainable fashion products and collections, The Smurfs and Peyo Company have been a steadfast creator of sustainable fashion for several years.

“Since 2017, The Smurfs are proud to be an ambassador to the United Nations and its 17 sustainable development goals,” says Van Buggenhout.

The goal of the program, she says, is to end poverty, fight inequality and address the urgency of climate change to build a better future for everyone.

“Emporio Armani and The Smurfs decided to collaborate a second time together to encourage new generations to consume responsibly by uniting their values and make the message stronger,” says Van Buggenhout.

“Indeed, Emporio Armani is engaged in sustainability with its values and the brand has a strong focus on sensitive environmental issues. The Smurfs are proud to be part of this journey by bringing a fun touch from their magical world to this unique collection.

“That’s what I like in that collaboration,” continues Van Buggenhout. “The fact of working with a luxury brand on serious and important topics, while staying fun and magic.”

The collection’s purpose is to raise awareness of sustainability and responsible consumption among younger generations. The specially designed packaging is also in line with the Armani Group’s sustainability strategy and the Armani Sustainability Values (ASV) protocol, which defines sustainability requirements for its materials and processes.

Thinking Outside the Box

The Smurfs brand is also known for its memorable blue color. In fact, the color is so iconic that thousands of people gather in Landerneau, France, every year to paint their bodies blue and dress up as The Smurfs.

Most of the time, the blue color is a strength for the Peyo Company when negotiating partnership deals. Yet some partnerships require a palette that is more diverse. So, the Peyo team adapts, which is also an integral part of the company’s licensing strategy.

“We came up with the idea of creating fashion style guides linked to trends that are present in the fashion market,” says Van Buggenhout. “We also have developed style guides with new graphic treatments and colors, so there is something for everyone.”



Left: The Smurfs x MIWA.
Right: Design Sketch for
The Smurfs x Emporio
Armani summer
collection.



The Smurfs x Emporio Armani summer collection.

Another major element of Peyo's licensing strategy is its ability to remain open to inspiration that may come in unfamiliar forms or from surprising places.

"Our strategy has always been to think outside the box and be where people don't expect us," says Van Buggenhout. "To position The Smurfs as a fashion icon, it is important to work with renowned and international brands, so it has a trigger down effect on the mass-market brands afterwards. The storytelling of those collabs is highly important and should match The Smurfs' values. Authenticity is key.

"I work with companies and go to countries all over the world and most of the time, I see something during my travels that gives me an idea for another collaboration. Our goal is to take The Smurfs into the unknown and always think outside the box," Van Buggenhout continues.

With Peyo's size and ability to deliver a tailor-made collaboration experience, The Smurfs can adapt to changing customer tastes.

"As a small family company with only 40 people working for The Smurfs from Belgium, Peyo Company has its own in-house studio; and our studio, designers and cartoonists are always up for creating tailor-made designs to match the storytelling our partners want to convey through their apparel and accessory collections," says Van Buggenhout. "Together with the team, we are always looking for new trends and new style guides."

Fashion is just one of the many categories that The Smurfs appear and succeed in. Since 2021, the Peyo Company has been developing gaming as an additional category differentiator. This decision proved to be sound, and in 2023, more than 3.8 billion gamers generated an estimated revenue of \$3.38 billion dollars tied to Smurfs titles, according to Peyo Company.

The first of five new console games was released in October 2021 by France-based games specialist, Microids. The fourth game, "Village Party," was launched in the summer and the final, more ambitious 3D game, "Dreams," launched in September.

"The Smurf characters and villages are ideal for console games because it's easy to create a universe that players can immerse themselves in," says Charles Leveugle, group marketing manager, Microids.

Perennial Nostalgic Appeal

Not to be undersold is The Smurfs continual appeal, generation to generation.

Today's adults were introduced to The Smurfs by their parents, who will undoubtedly continue to pass down The Smurfs tradition to their children.

These deep roots in global culture are a strength not many brands can claim in 2024. With this long history comes countless IP iterations to draw from for product inspiration, whether through classic or vintage designs for the many varied characters that span the property.

"Our brand heritage, its storytelling and the fact that we are a multigenerational IP and a pop-culture icon enable us to propose different ways of collaborating with our licensees and retailers," says Van Buggenhout. "Through the years, The Smurfs have been subject to several graphic treatments. Vintage drawings, sketches visuals, classic images, 3D shapes ... there is one for everyone's taste."

This year, The Smurfs celebrate their 66th anniversary, and with it comes fresh content, including new episodes of its TV series (available on Nickelodeon and Netflix) and an upcoming film with Paramount Pictures/Nickelodeon set to arrive in 2025. The film will boast an all-star voice cast, including Rihanna as Smurfette, Nick Offerman, Natasha Lyonne, Daniel Levy, Amy Sedaris, Nick Kroll, James Corden, Hannah Waddingham, Sandra Oh, Kurt Russell, John Goodman and many more.

"Content is very important for us and keeps the original DNA of the property while introducing The Smurfs' magical world and universal values to today's kids," says Gilles. "Since 2021, Peyo Company is the proud co-producer of 'The Smurfs' CGI-animated series, together with Dupuis Audiovisuel. The animated series is broadcasted and streamed worldwide on Nickelodeon, local TV channels and Netflix. And our new pride and joy is the upcoming Paramount musical movie that will be theatrically released next July. When launching a TV series, a movie or even a video game, it is essential to extend the brand experience to the audience with a strong consumer product and book publishing program. There is a main brand approach for merchandising related to the ever-green and nostalgia side of the brand, that is then adapted to each type of release, should it be for a longer period in the case of a TV series or a shorter period, if we're talking about a movie or even a video game."

Fresh IP, a commitment to core brand values and internal flexibility that allows The Smurfs to stay fresh and innovative year after year will surely see the Peyo Company celebrating the beloved blue icons for decades to come.

"Whenever you hear people talk about The Smurfs, they always have a big smile on their faces," says Van Buggenhout. "And that's what we aim to spread when we create collaborations – happiness and joy." ©

2024: A YEAR IN LICENSING

As 2024 draws to a close, License Global looks back at some of the biggest trends and most popular stories this year in the world of brand licensing.

by IAN HART AND GIANNA ROSENBACH

A view of the London Toy Fair 2024 show floor.

LICENSE GLOBAL PRIDES itself on bringing you, the reader, the most up-to-date news and analysis of all the latest trends, cross-category, from the world of brand licensing.

This year has seen the entertainment sector thrive, with major brands such as Disney, Pokémon, Hasbro and Mattel continuing to dominate the licensing landscape. Thanks to the success of movies, especially “Deadpool & Wolverine,” “Despicable Me 4,” “Beetlejuice Beetlejuice” and the soon-to-be-released “Wicked,” streaming and children’s programming, entertainment remains a significant driver in consumer product licensing. Video games are also big business, marking a \$35 billion (19%) brand licensing market share in 2023, according to Licensing International’s Global Licensing Survey. Brands are leveraging virtual spaces for immersive experiences and digital goods.

The fusion of high fashion and pop culture continues to grow, with luxury brands collaborating with entertainment franchises, sports

teams and influencers. The rise of celebrity-endorsed products and influencer partnerships was another big focus throughout the year.

Classic brands and nostalgic properties continue to be driven by consumer interest in retro toys, games and media.

With events like the 2024 Paris Olympics and the rise of women’s sports, sports licensing is growing rapidly. Licensed merchandise for major sports teams, leagues and athletes is expected to surge in the coming years.

Every December, we look back on some of the more significant stories, month-by-month, to see what the bigger licensing stories have been and, quite possibly, will be. Check out some of the highlights from the past year.

January

Hasbro Sells Entertainment One Film and TV Business to Lionsgate

Hasbro kick-started 2024 by announcing the

completion of the sale of its Entertainment One film and TV business to Lionsgate for a purchase price of \$375 million in cash. Hasbro will continue to develop and produce entertainment based on its rich vault of Hasbro brands.



Capri Sun Teams with Nintendo

Characters from the game franchises of “Mario Kart 8 Deluxe,” “Animal Crossing: New Horizons” and “Pikmin 4” were added to the cartons and pouches of Capri Sun Fruit Punch, Strawberry Kiwi and Pacific Cooler.

State of Play: Toy Trends on Display at London Toy Fair 2024

License Global visited the 70th edition of the annual event at Olympia, London, and the resilience of the U.K. toy market was evident throughout the show, with licensed toys continuing to play a vital role in the market dynamics. The licensed toys sector reported sustained growth for the fifth consecutive year, with market share increasing to 32% from 26% in 2020.

February

Sanrio Launches Mr. Men & Little Miss Happy Meals with McDonald's

The fast-food chain announced Mr. Men & Little Miss Happy Meal Toys in the U.K. market, including one of 10 Mr. Men & Little Miss plush toys or one of four "Discover You" books in a limited-edition box.

Kung Fu Tea, 'Miraculous' Announce Themed Drink Collab

Kung Fu Tea announced a collaboration with the 3D-CGI-animated superhero action-comedy series, "Miraculous: Tales of Ladybug & Cat Noir." The partnership introduced two character-themed drinks, exclusive stickers, a social media sweepstakes and an array of surprises for fans.



State of Play: Toy Trends from Nuremberg 2024

The strength of the toy market continued to shine through at Spielwarenmesse 2024, with kidult culture, trading cards and games and sustainable products in the spotlight in Nuremberg. Several big announcements were made at the show, including The LEGO Group, in collaboration with Lucasfilm, kicking off the 25th anniversary of its "Star Wars" collaboration by unveiling a special anniversary logo on new LEGO "Star Wars" Building Sets.

Movies and Fashion Special Reports

Movies were also a central focus of the February issue of License Global, with our two special reports delving into which toyetic movies will be huge with the small set in 2024 and what the numbers say about where we are and where fashion licensing trends are headed.

March

Gaming and Publishing Take Center Stage

License Global's March issue focused on the trends impacting gaming brands in 2024 and outlined how intellectual properties and collaborations drive continued engagement in one of the world's most exciting and immersive mediums. License Global also looked at the hidden gem in licensing, publishing, with many opportunities to have a brand leap off the page and into everyday life.



Primark Unveils Collab to Mark 50 Years of Hello Kitty

Primark teamed up with Sanrio to unveil a new collection inspired by Hello Kitty. The collection was part of a new strategic partnership between Primark and Sanrio and celebrated 50 years of the pop-culture icon, featuring over 100 items across womenswear, kidswear and homeware.

Mattel Announces 'Street Sharks' 30th Anniversary Relaunch

Sharks returned to shelves as Mattel reignited the brand to mark the 30th anniversary of the animated "Street Sharks" TV show. The collection included action figures inspired by three characters, Ripster, Jab and Slash.

Mighty Coconut and Aardman Partner for "Walkabout Mini Golf: Wallace & Gromit"

Mighty Coconut, the independent entertainment studio behind "Walkabout Mini Golf," partnered with Aardman for a downloadable content course featuring 18 easy-mode and hard-mode holes, specially designed lost balls to collect, a commemorative in-game putter and themed avatars, all set in the world of "Wallace & Gromit."

April



Mattel and Heinz Team Up for Barbicue Sauce

Mattel teamed up with Heinz to launch a limited-edition Heinz Classic Barbicue Sauce. The pink vegan mayo with BBQ sauce followed last year's continued Barbiecore craze.

Amazon MGM Studios Unveils Licensing, Merch Plan For 'Fallout'

Amazon MGM Studios announced a multifaceted licensing program for the post-apocalyptic series, "Fallout," based on the global video game franchise.

"Bridgerton"-Inspired Box Arrives at Lush

Lush's spring installment of the Lush Fresh & Flowers Box took inspiration from Netflix's "Bridgerton" series. The box included soap, bath bomb, toner, cleanser and face mask.

Longaberger, Crayola Launch New Collaboration

The home collectible brand, Longaberger, partnered with Crayola to bring nostalgia home through baskets that showcase distinct Crayola characteristics, colors and hand-woven craftsmanship that could spark the creativity within all of our inner child.

May



Licensing Expo Gathers Highest Number of Retailers to Date

Retailers flocked to the Licensing Expo in Las Vegas in droves. The show convened more than 12,000 international attendees from all categories to engage with more than 5,000 brands represented on the show floor, including 106 first-time exhibiting brands. The show, organized by Informa Markets, recorded a 35% increase and a record-high number of qualified retailers.

‘Wicked’ Product Collaborations

Universal Pictures’ “Wicked,” which hit theaters in November, was one of the standout IPs of the year. The vibrant world in which the untold story of Elphaba and Glinda takes place has inspired innovative products with licensees and retailers worldwide, including apparel, accessories, footwear, home décor, beauty, toys, role-play, publishing, collectibles and more.



IMG to Rep McDonald’s

IMG announced a new, multi-year deal as McDonald’s exclusive global licensing representative. Through this collaboration, IMG will work with McDonald’s to develop a wide range of licensed products and experiences globally, building upon the brand’s status and driving its growth.

Cloudco Entertainment Adds New Licensees for Care Bears

New collaborations announced across multiple categories extended the brand’s reach and message of sharing and caring.

June



Ore-Ida Releases ‘Napoleon Dynamite’ Tater Tot-Protecting Pants

Some of the quirkiest licensing deals often make the biggest splash, such as this innovative solution to safeguard Tater Tots, the limited-edition Ore-Ida Tot-Protecting Pants.

July



Team USA, Minions Launch Limited-Edition Apparel

To celebrate the 2024 Paris Olympic and Paralympic Games, Illumination’s Minions joined forces with Team USA for a capsule collection. “Despicable Me 4” went on to set new box office records for the franchise in September, leading to the confirmation of “Minions 5” for 2027.

Hunter Price, Kellogg’s Pair for Pringles Products

Hunter Price International announced it teamed up with Pink Key Licensing to launch a collection of stationery, plush, blankets, fleeces and gifting lines for snack brand Pringles, marking the companies’ first signing in the food and beverage space.

Paramount Global Merges with Skydance Media

The merger forms “New Paramount,” a next-generation media and technology leader backed by over \$8 billion from the Ellison family and RedBird Capital Partners. The transaction reinforces Paramount’s legacy by combining Skydance’s creative assets and digital capabilities, allowing expansion into areas such as gaming, animation and sports.

August



‘Deadpool & Wolverine’ is on a Roll

Blockbuster superhero movies like “Deadpool & Wolverine” involve licensing, and this summer, in conjunction with the film’s release, various deals, from toys and collectibles to apparel and food, were launched, which saw impressive numbers.

The Olympics: Licensing Gold

Sports and licensing are a marketing match made in heaven and the Summer Games in Paris fuelled lucrative partnerships across multiple categories. Standout deals included collaborations between Team USA and Warner Bros.’ Looney Tunes, Team GB and Topps and Anti Social Social Club’s Paris 2024 capsule collection. Even pets enjoyed the fun with Team USA dog toys and apparel from PetSmart. The cover story of our August Issue of License Global profiled the meteoric rise of women’s sports.

Warner Bros. Discovery Unveiled Merch Ahead of ‘Beetlejuice Beetlejuice’

“Beetlejuice” was another IP that made waves this year with Warner Bros. releasing the sequel to Tim Burton’s original cult classic. The merchandise collection included luxury fashions, toys, decorations and costumes for all ages, plus additional retailer collaborations with Target, Amazon, Primark, Forever 21 and more.

Automotive and Food Special Reports

Our August issue also focused on global automotive businesses and how they are taking their brands off-road. License Global also investigated the creative and, at times, outlandish food and beverage collaborations this year and why they're so popular with consumers.

September



Brand Licensing Europe's 25th Anniversary and Record Attendance

Brand Licensing Europe (BLE) 2024 achieved record-breaking attendance, celebrating 25 years with a 12% increase in attendees and a 22% increase in retailer visitors compared to 2023. The show drew over 10,847 attendees from 172 countries and hosted over 6,200 meetings through the BLE online Event Planner.

PUMA, Manchester City Launch 'Definitely City' Collection with Oasis' Noel Gallagher

While fans joked that an Oasis reunion was not on their 2024 bingo card, the excitement for the band's tour announcement rose quickly. That momentum continued with PUMA and Manchester City teaming up with Noel Gallagher to launch the "Definitely City" kit for the 24/25 season, celebrating the 30th anniversary of Oasis' "Definitely Maybe" album.

'Bluey' Makes Debut at Build-A-Bear

Build-A-Bear Workshop launched its first "Bluey" collection, partnering with BBC Studios to bring Bluey and her sister Bingo to life as customizable plush toys.

Primark Unveils Exclusive 'Beetlejuice' Collection in Collaboration with Costume Designer Colleen Atwood

The 12-piece collection captured the essence of the blockbuster sequel through a range of distinctive womenswear pieces, including graphic T-shirts, hoodies and accessories. Primark designed the collection in collaboration with four-time Academy Award-winning costume designer Colleen Atwood, renowned for her work on some of Hollywood's most memorable costumes, including those in the original "Beetlejuice" film.

October

Gap and Cult Gaia Drop Apparel Collab

The Gap x Cult Gaia collection combined Gap's classic styles with Cult Gaia's sculptural, artistic approach for statement fashion pieces.



Crayola Studios, Hallmark Announce Expansion of Rainbow Brite Franchise

Nostalgia continues to drive fandoms and revive IPs from decades past for a new generation. In celebration of Rainbow Brite's 40th anniversary, Crayola Studios and Hallmark are partnering to reimagine the beloved '80s brand with a new feature film and TV series, sure to provide demand for new licensed products.

Paramount Consumer Products & Experiences U.K. to Launch 'TMNT' Merch with The Sidemen

Paramount Consumer Products & Experiences U.K. partnered with The Sidemen to launch an exclusive "Teenage Mutant Ninja Turtles" merchandise collection featuring 13 unique designs across T-shirts, hoodies, jackets and boxing accessories.

November



STUDIOCANAL KIDS & FAMILY Brings New Paddington Game to Roblox

Ahead of the release of "Paddington in Peru," STUDIOCANAL and Paddington made their way into the virtual world with the launch of a Roblox game, "Mission Marmalade," developed by FEENIX studio.

Bluey Joins 'Strictly Come Dancing' for BBC Children in Need

The "Strictly Come Dancing" ballroom has seen many stars, but this year, Bluey stole the show as she danced alongside the pros to help raise funds for BBC Children in Need. Fans were also invited to take part in Bluey's Dance Mode Challenge and share their moves on social media.

Disney, lululemon Launch High-Performance Apparel Collection

The Disney x lululemon 34-piece dual-gender collection offers a variety of products, including classic lululemon performance styles and casual favorites. Inspired by archival Disney graphics, the collection features modern and elevated takes on the imagery of Mickey Mouse and Minnie Mouse.

North America's First LEGO DUPLO Peppa Pig Playground Opens in New York

As License Global predicted, location-based entertainment has been on an upward trajectory with no signs of slowing down. After taking a hit during the pandemic, fans are eager to physically immerse themselves in worlds based around their favorite IPs. Two iconic IPs, Peppa Pig and LEGO DUPLO, have come together to create an engaging experience at LEGOLAND New York Resort. The attraction, specifically designed for young children, encourages them to embrace adventure and leap courageously into life's muddy puddles. ©

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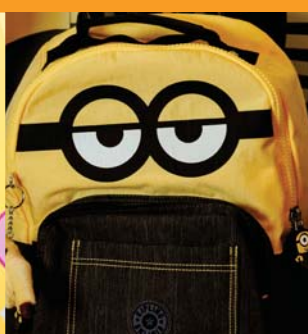
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