



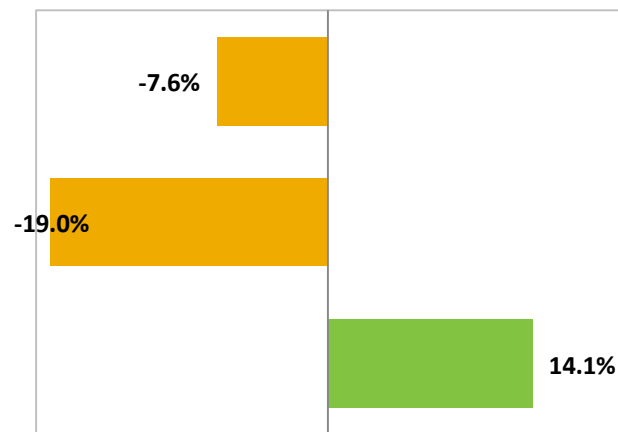
ATA Report

April 2018

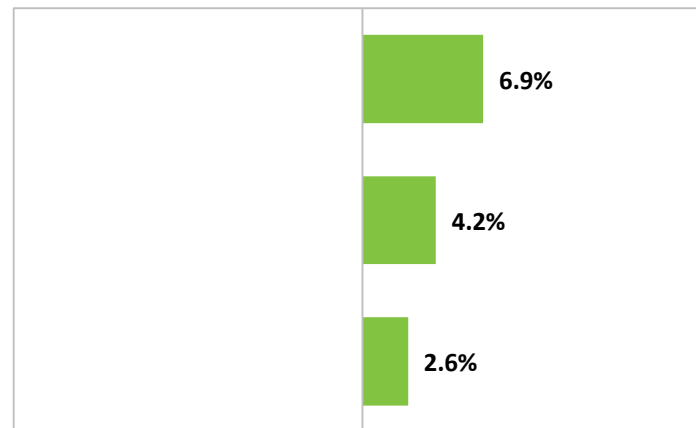
Australia Toy Association

Industry Trends

Due to the timing of Easter, month on month April comparison to last year was negatively affected. Easter 2017 fell on 16 April while Easter 2018 was on 1 April and therefore, the peak period was brought forward to March this year. Standard Building Sets, Mini Vehicles, Traditional Plush and Bubble/Solution were some of the categories that saw strong decline in units. Price points under \$10 saw a value decline of -11%, while price points above \$10 were down -7%. Meanwhile YTD trends are still up, partly helped by an extra week in the 2018 calendar vs. 2017.



April % Change YOY

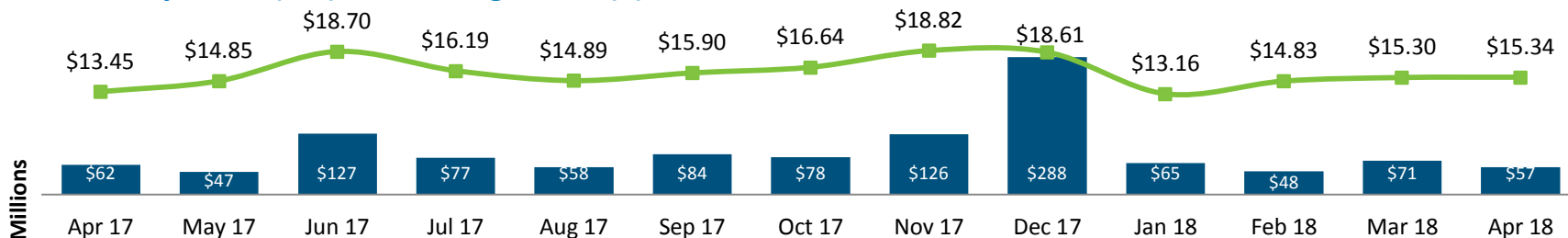


YTD % Change YOY

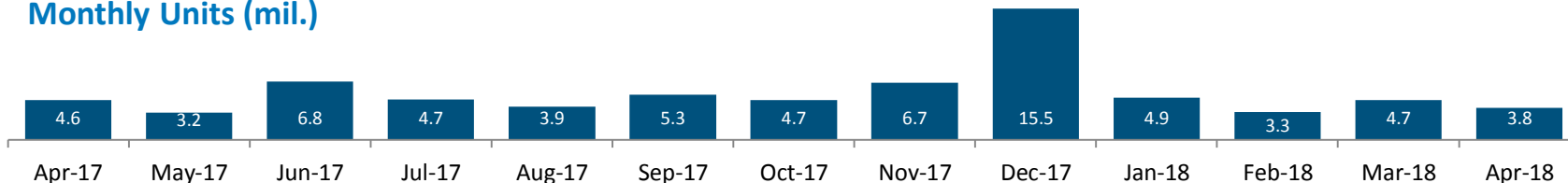
Monthly Trend

2018 post Easter decline in value (Mar18 vs Apr18) at -19% was not steep as last year's post Easter decline (Apr17 vs May17 at -24%). The trend is also similar volume wise whereby 2017 post Easter period saw the market dip by -31% while this year declined at the same rate as the value. While average price from Mar18 to Apr18 remained flat, the average price compared to the same month last year increased by 14%. Since Easter fell in April last year, there were more Easter friendly priced products during that time compared to April this year.

Monthly Value (\$m) and Average Price (\$)



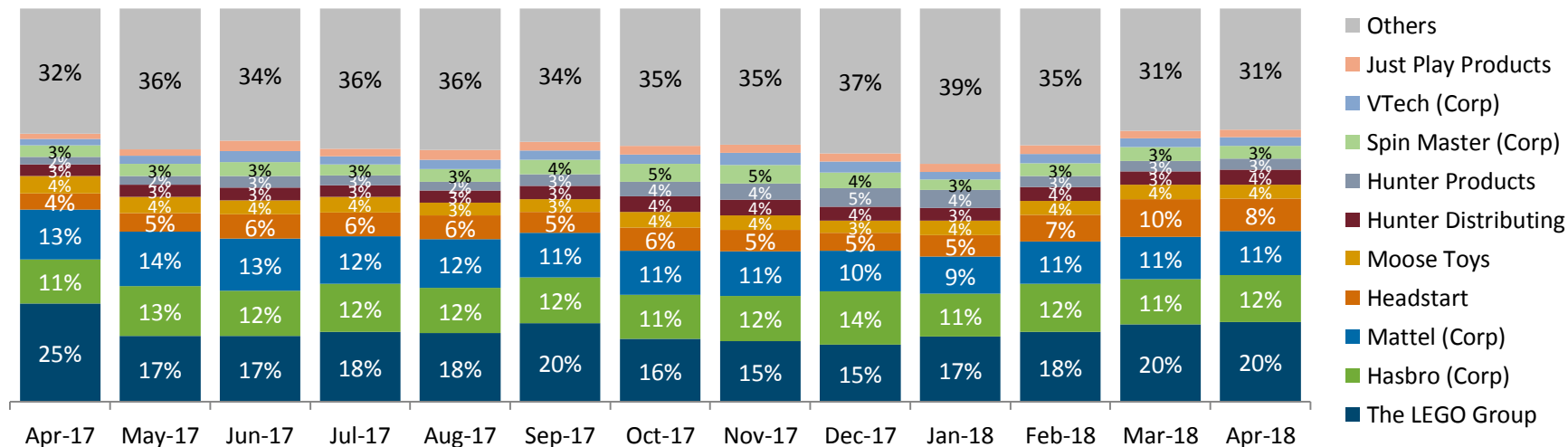
Monthly Units (mil.)



Corporate Manufacturers Trends

(ranked in value current YTD)

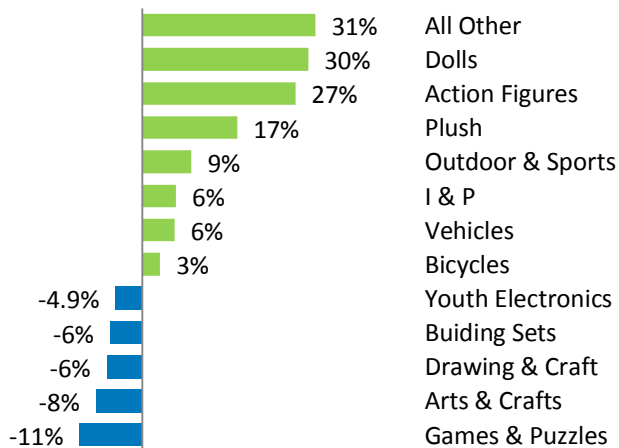
In Apr18, the top 3 brands maintained their share and declined at the same rate of -16% compared to Mar18. Lego maintained their share from Mar18 and still accounted for one-fifth of the market in Apr18. Headstart doubled their share compared to same month last year, but post Easter, they declined by 31%.



Category Trends

All Other Toys, the ninth largest supercategory in dollars with 4% share of the market had the strongest growth in value. This was mainly led by increases from squishy toys. In Dolls L.O.L Surprise continued to be the star performer. Barbie being the second largest property also saw an increase particularly within Fashion Accessories. Within Action Figures, the fifth largest supercategory, Beyblade continued to dominate, accounting for 30% of that super category. Within Plush, Pikmi Pops was the fastest growing brand with 15% share of the category.

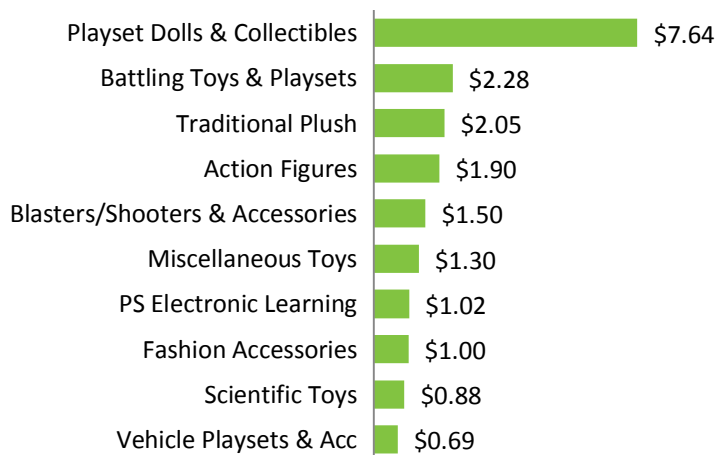
Value Change YTD



Subclass Trends

Breaking it down by subclasses, Playset Dolls and Collectibles subclass continues to lead the growth of Toys and that is led by L.O.L. Surprise. Within Traditional Plush, Ty Beanie Boos and Pikmi Pops were top 2 best selling brands. Similar to previous months, Beyblade continues to dominate Battling Toys & Playsets. A small segment of Games/Puzzles category, Strategic Trade Card Games decline came from Pokemon. Standard building sets decline mainly came from Star Wars and DC Comics.

Fastest 10 Growing Subclass by Value-added YTD (\$MM)



Fastest 10 Declining Subclass by Value-lost YTD (\$MM)



Property Trends

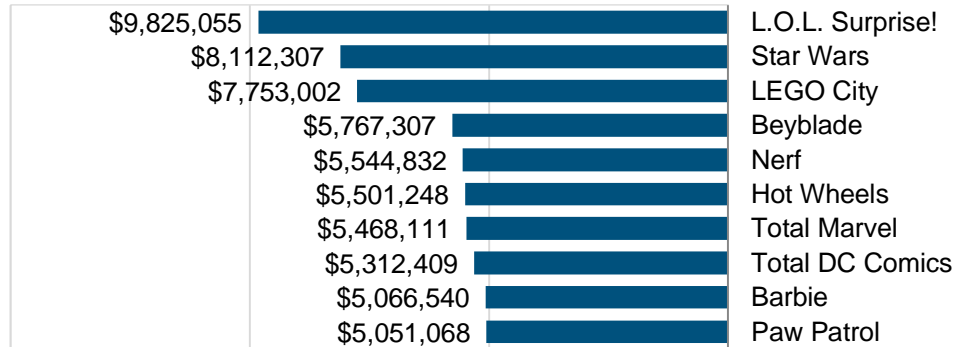
Top 5 new properties YTD Apr17 vs. YTD Apr18

- #1 – Pikmi Pops
- #2 – Soft N Slo Squishies
- #3 – Turning Mecard
- #4 – Fingerlings
- #5 – Baby Secrets

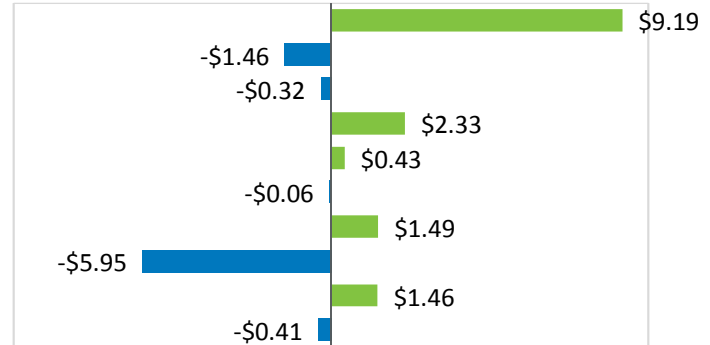
Top 5 growth properties YTD Apr17 vs. YTD Apr18

- #1 – L.O.L Surprise!
- #2 – PJ Masks
- #3 – Hatchimals
- #4 – Beyblade
- #5 – Cars The Movie

Top 10 properties in value YTD Apr17 vs. YTD Apr18



Sales value in \$mil.



Gain/loss in \$mil

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