



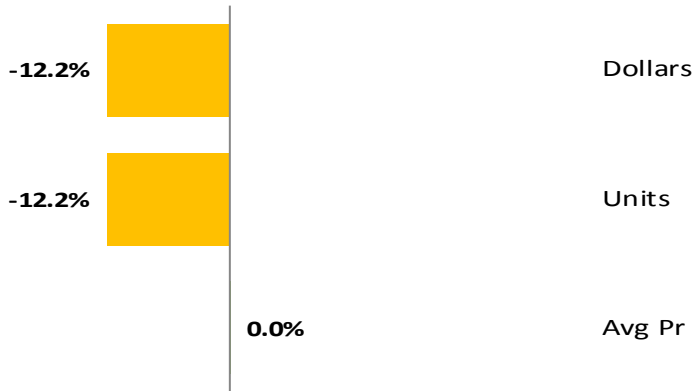
August 2018

ATA Report

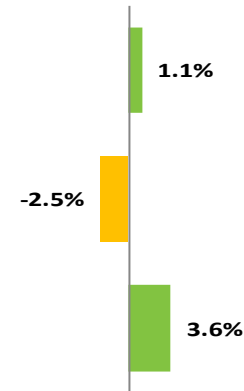
Australia Toy Association

Industry Trends

The decline in August is not as pronounced compared to July. It is promising to see that the total market average price is still holding up in August despite the loss of Toys “R” Us. Month on month comparison showed growth for Building Sets at +6% and All Other Toys at +5%. Based on historical data, when a discount retailer in the U.K closed down late 2008, the first 4 months had the worst impact. Assuming nothing else happens within the retail landscape in Australia, the level of decline will be softer in the lead up to Christmas.



August % Change YOY

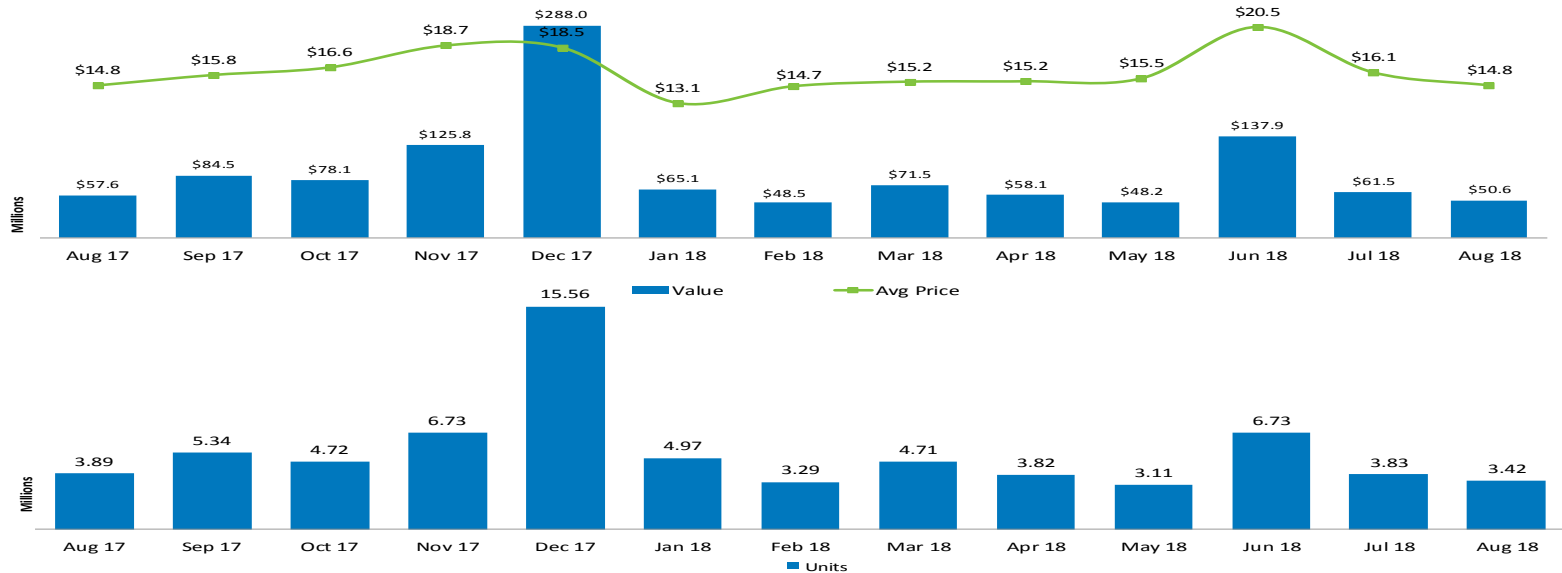


YTD % Change YOY

Monthly Trend

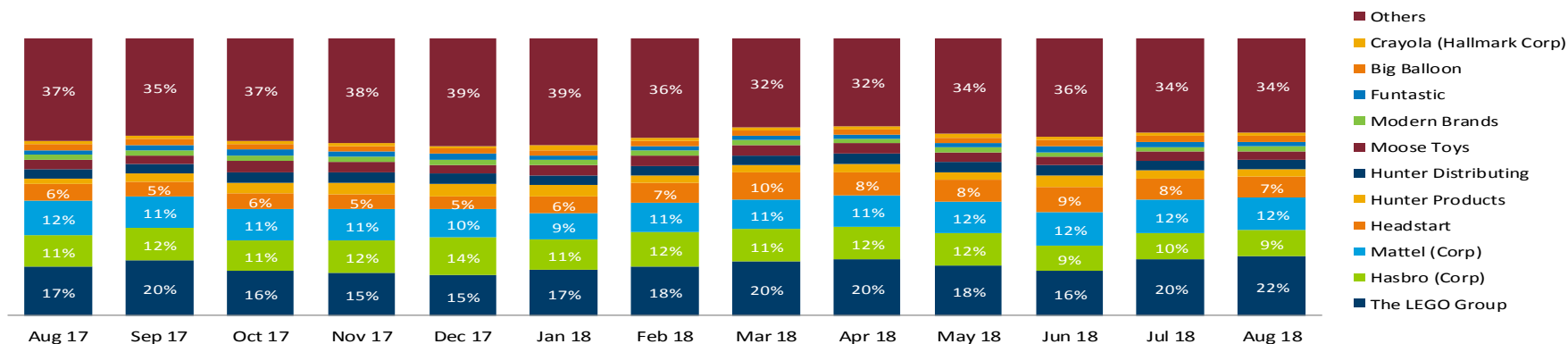
The August average price has remained flat on last year despite the double digit value and volume decline. The average price for Building sets, Dolls, Games/Puzzles and All Other Toys saw an increase compared to August17. Dolls had the highest lift in average price going from \$13.25 to \$14.95.

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



Corporate Manufacturers Trends

Lego had an exception August, this is their best share since September 2015 (23%). Lego Harry Potter showed a strong uplift in the month of August and was Lego's third largest brand, even ahead of Lego Jurassic World. Mattel maintained their share in the last 4 months, driven by Fashion accessories. Headstart still experienced growth compared to same month last year, +9% driven by L.O.L Surprise.

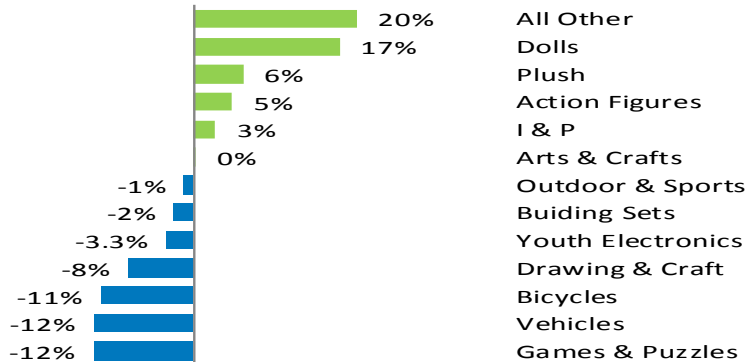


Top Distributors rank by Market Share

Category Trends

All Other Toys growth continued to be led by squishy toys. L.O.L Surprise drove the playset dolls & collectibles subclass while Barbie drove the Fashion Accessories subclass. Growth within Plush was led by Pikmi Pops. Hatchimals within Plush was the #1 brand in Aug17 but it had a decline of over -50% when compared to Aug18. However, Hatchimals Colleggtibles within Dolls grew by +14% month on month. Despite the year on year decline for Building Sets, Lego actually had a fantastic August this year – this was partly driven by Harry Potter, which became the 5th largest property in the latest month. Vehicles continued to decline due to the annualisation of Cars 3 The Movie.

Value Change YTD



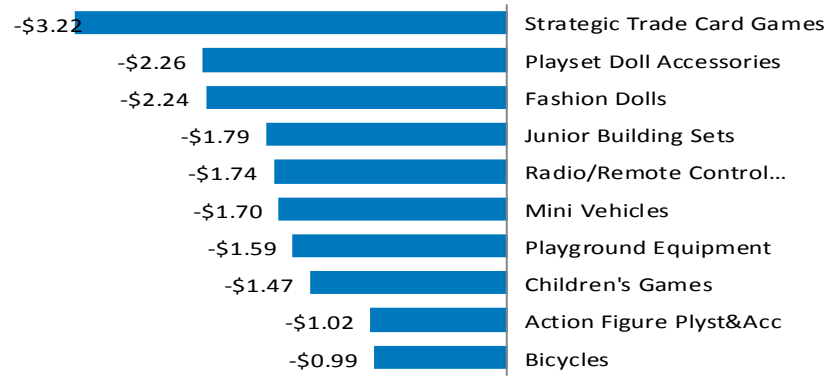
Subclass Trends

Playset Dolls and Collectibles continued to widen the gap with all the other subclasses. Within Fashion Accessories, Barbie remained unchallenged with over 90% share of that segment - accessories that compliments Barbie fashion dolls, such as the Dream Camper, Dream House. During Toy Cat this year, Fashion Accessories was larger than Fashion Dolls.

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



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



Property Trends

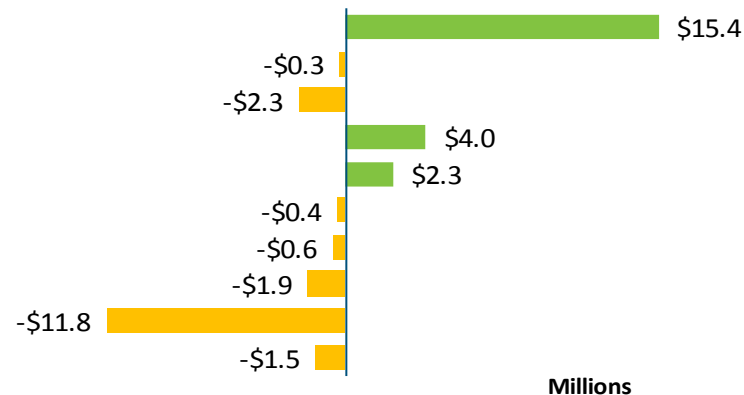
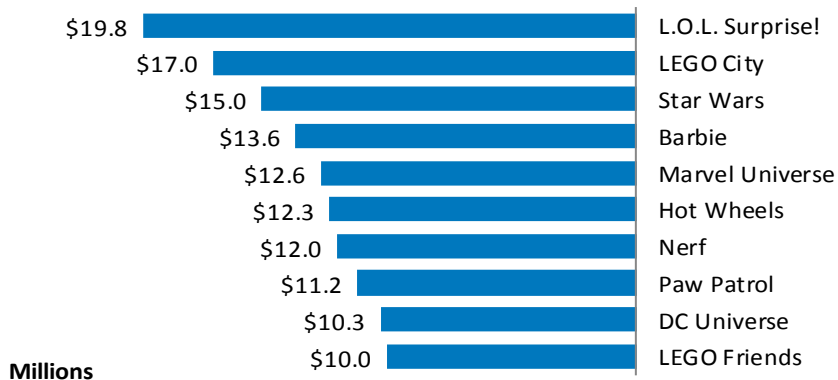
Top 5 new properties YTD Aug18 vs. YTD Aug17

- #1 – Pikmi Pops
- #2 – Fingerlings
- #3 – Smooshy Mushy
- #4 – Lego Harry Potter
- #5 – Soft N Slo Squishies

Top 5 growth properties YTD Aug18 vs. YTD Aug17

- #1 – L.O.L Surprise!
- #2 – Jurassic Park/World
- #3 – PJ Masks
- #4 – Pikmi Pops
- #5 – Barbie

Top 10 properties in value YTD Aug18 vs. YTD Aug17



For more information

Contact The NPD Group at 866-444-1411 or email contactnpd@npd.com, or your account representative below.

Amelia Eng

Senior Account Manager

Amelia.Eng@npd.com

+61 418 500 547

Seton Leung

Director Toys and Video Games

Seton.Leung@npd.com

+61 0408 190 341

About The NPD Group, Inc.

The NPD Group provides market information and business solutions that drive better decision-making and better results. The world's leading brands rely on us to help them get the right products in the right places for the right people. Practice areas include apparel, appliances, automotive, beauty, consumer electronics, diamonds, e-commerce, entertainment, fashion accessories, food consumption, foodservice, footwear, home, mobile, office supplies, retail, sports, technology, toys, video games, and watches / jewelry.

For more information visit us at www.npd.com

Follow us on Twitter: [@npdgroup](https://twitter.com/npdgroup)