



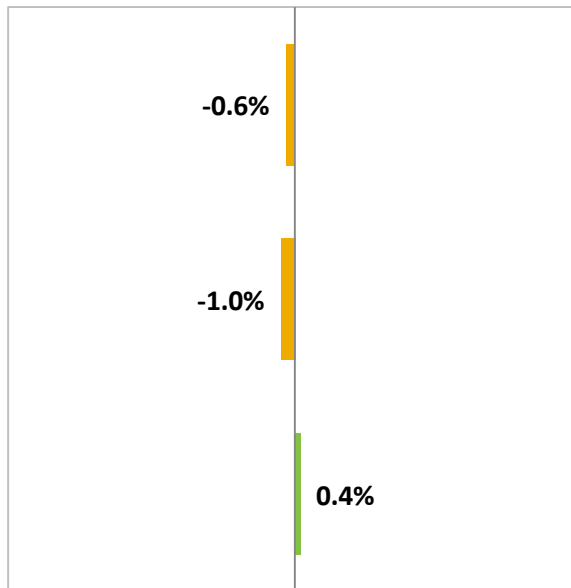
ATA Report

October 2017

Australia Toy Association

Industry Trends

October Toys performance value remains flat against last year (-0.6%), although the YOY decline is shrinking versus Sept YOY in the lead up to Christmas. The YTD decline of -1.5% means a heavy reliance on performance turnaround in the last QTR that may be supported by the launch of value driving movies.

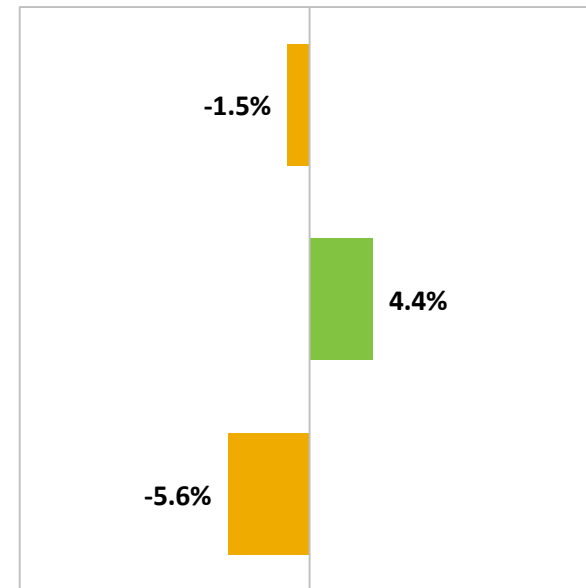


October % Change YOY

Dollars

Units

Avg Pr

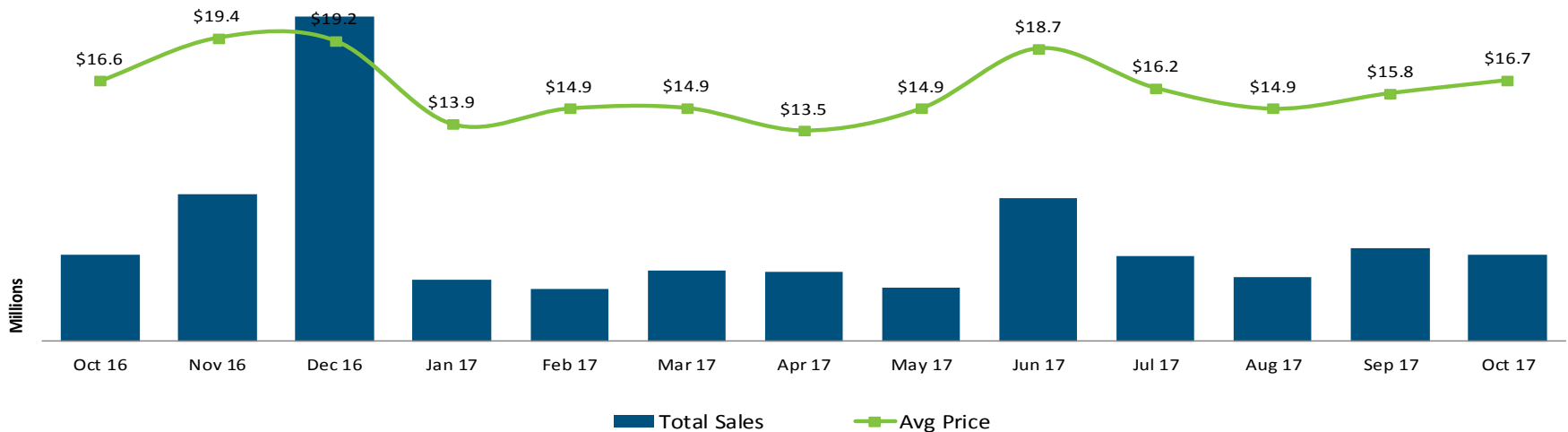


YTD % Change YOY

Monthly Trend

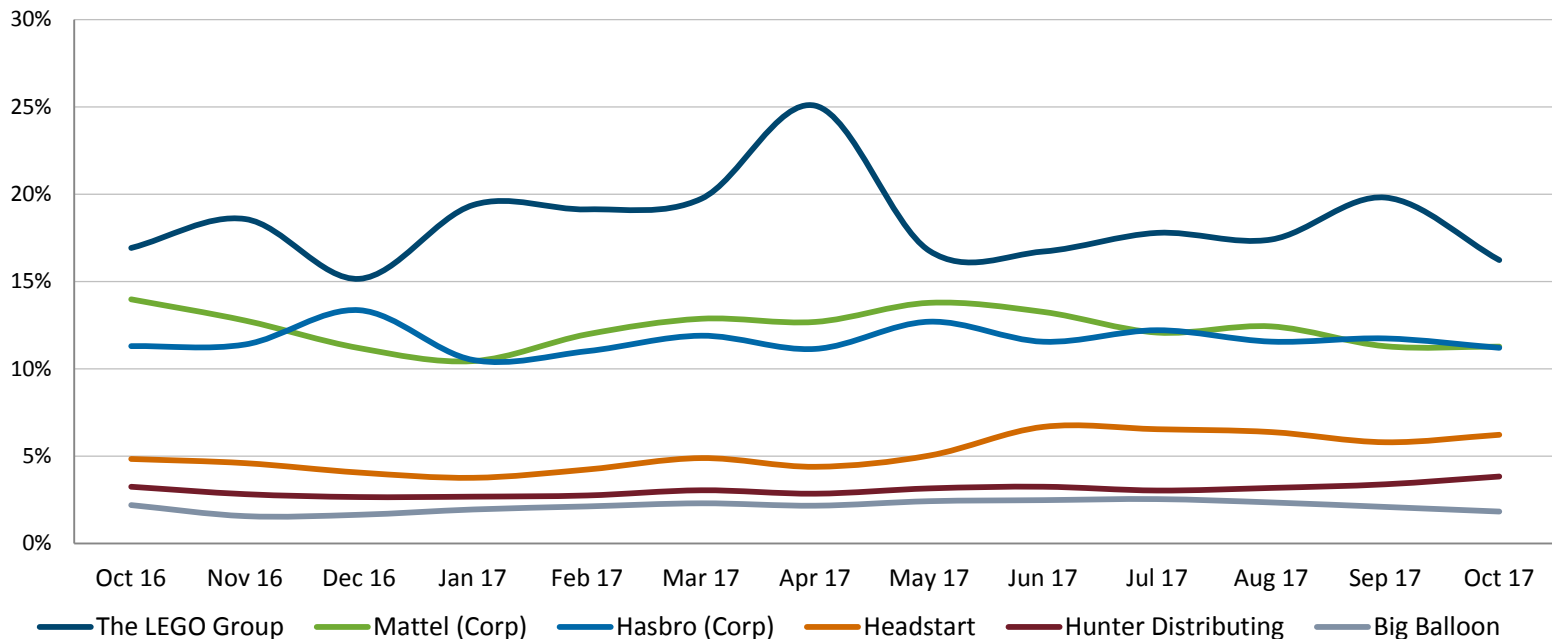
The average price has increased in October to \$16.70, resulting in the second highest price point in YTD after June's Toy Catalogue spike and increasing slightly (+0.4%) from a year ago. In YTD, average price has been falling -5.6% YOY, driving a value performance decline of -1.5%. This hasn't been offset by the fact unit performance has increased in YTD by +4.4%.

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



Corporate Manufacturers Trends

Lego has suffered a share decline in October following a strong September with almost 20% share and now dropping to 16%. Meanwhile, Hasbro has lost 0.5ppt to command 3rd rank whilst Mattel has held its share of 11.3% in Oct to command 2nd rank.

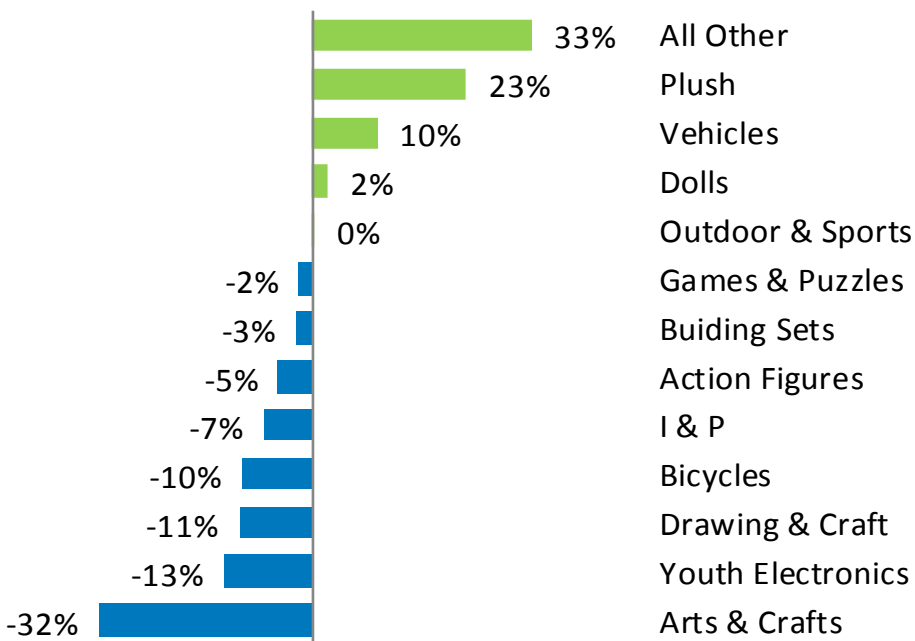


Top Distributors rank by Market Share

Category Trends

Ooshies continues to drive the strong performance in 'All Other Toys'. Meanwhile Plush has also undergone a strong performance in October (+45% for the month's sales change and +23% YTD). This is driven by new releases in Puppets.

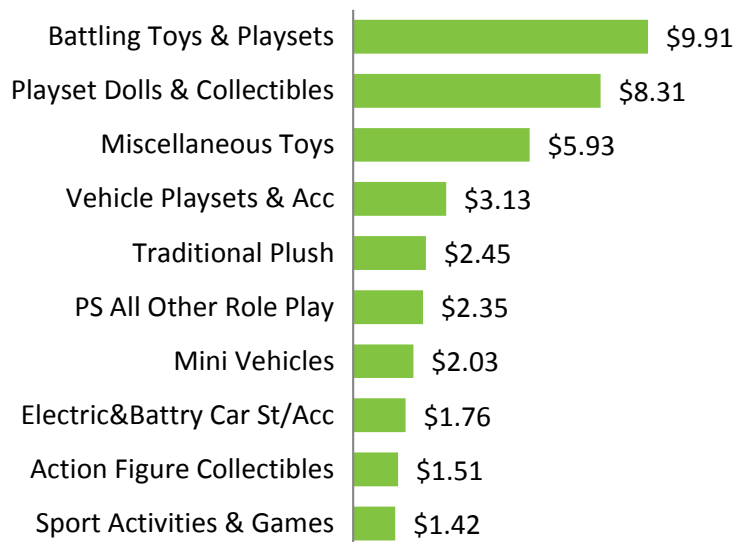
Value Change YTD



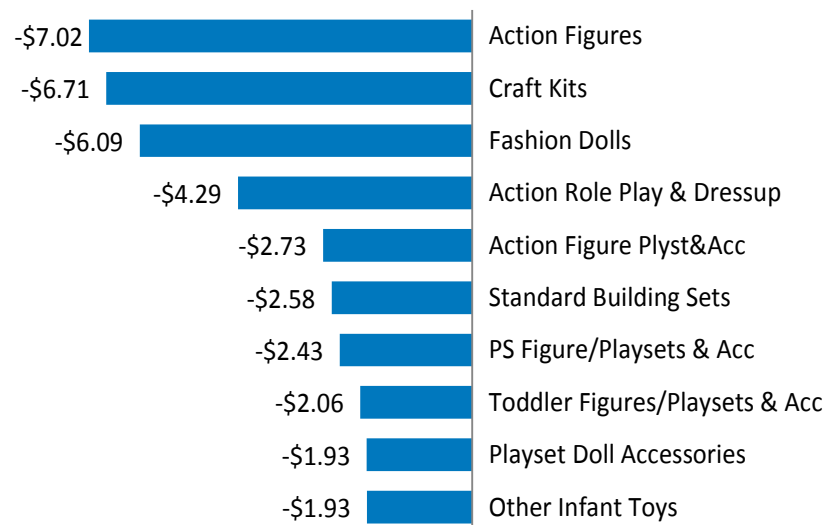
Subclass Trends

Action Figures to be the fastest declining subclass although the last quarter of 2017 with movie sequels should turn this around and drive significant value into Toys.

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



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



For more information

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