



ATA Report

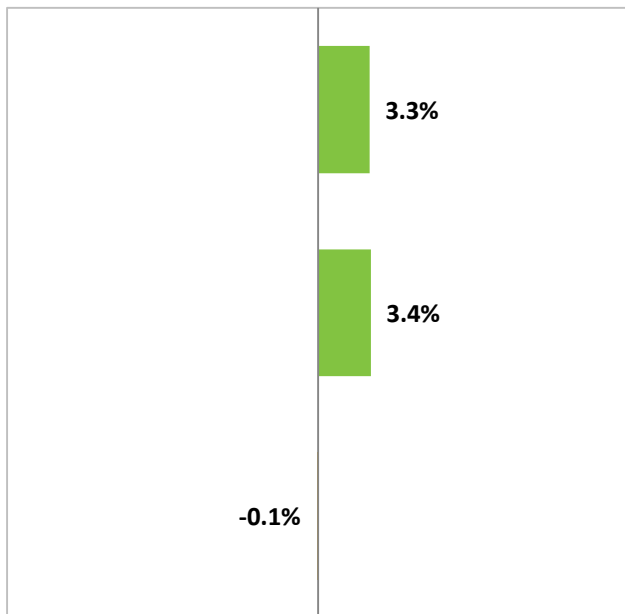
February 2018

Australia Toy Association

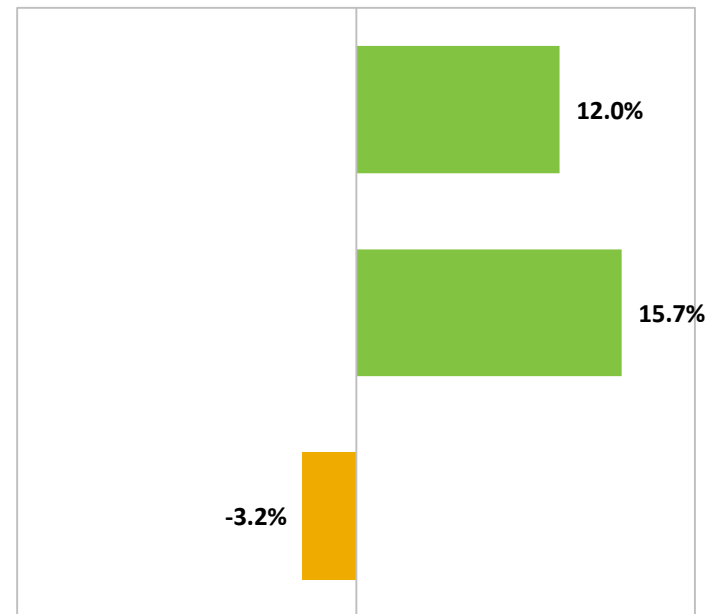
Industry Trends

February Toys performance saw a value increase against last year (+3%), when looking at YTD figures the increase is higher (+12%), helped by an extra week in the calendar vs. 2017.

Decline of ARP by **-3%** YTD is driving stronger volume increase (+16%) compared to Value, collectibles continue to be a key contributor for the price decline during the start of the year



February % Change YOY

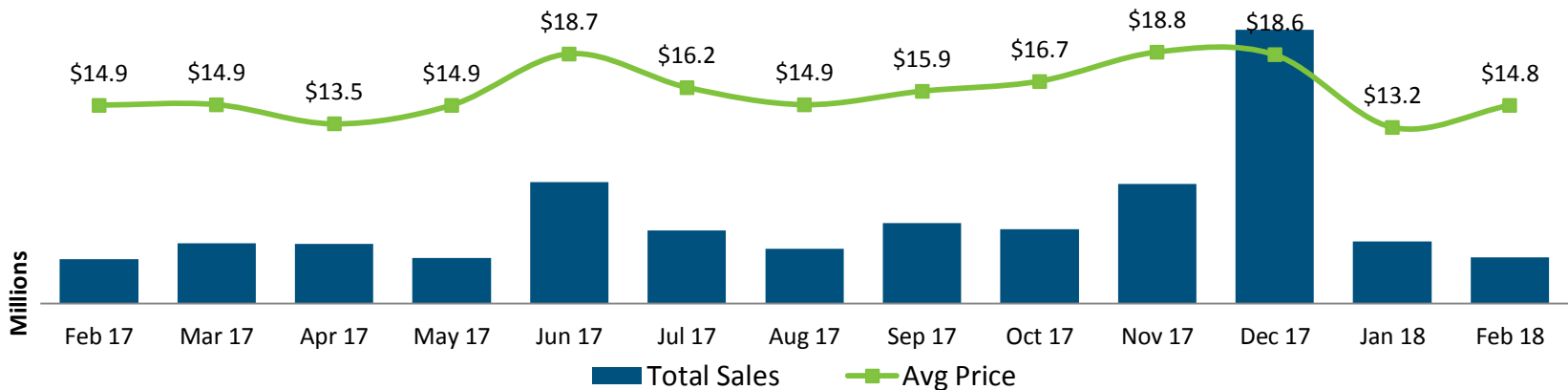


YTD % Change YOY

Monthly Trend

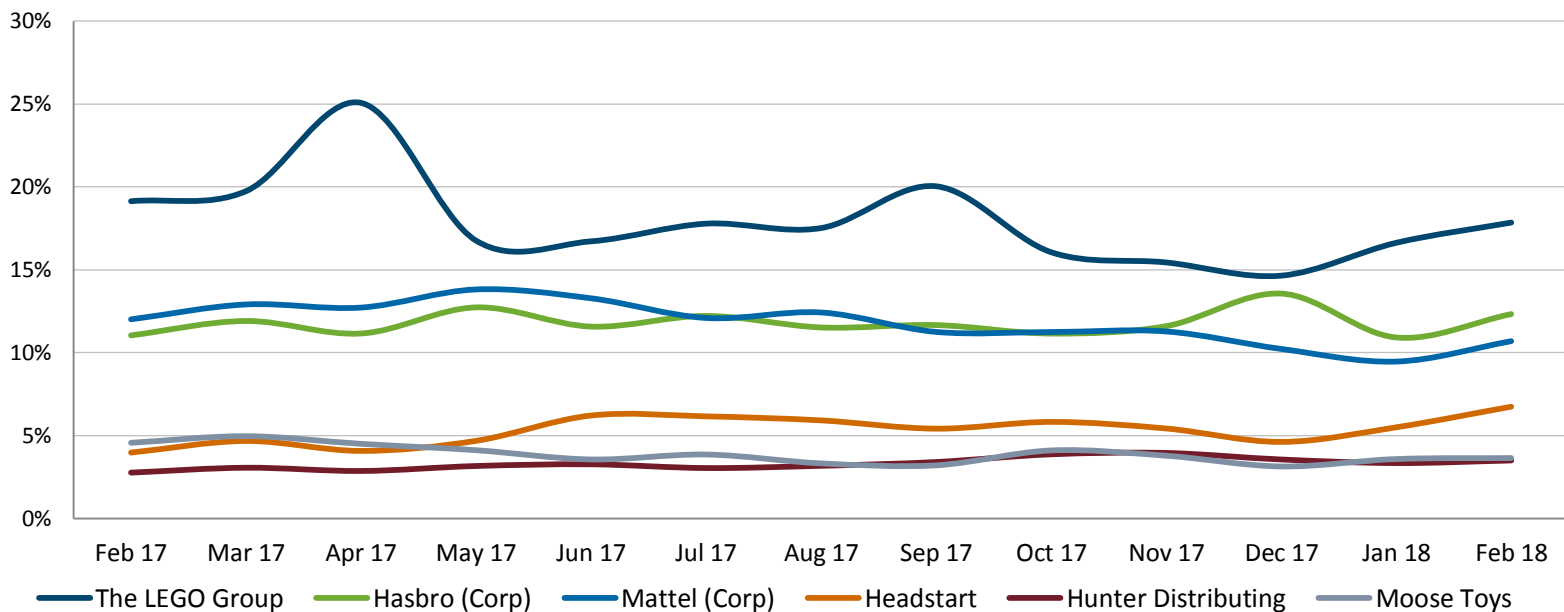
Average price in February has increase by 12% compared to prior month, reaching the same price point as same time last year. ARP has increased across both collectibles and non-collectibles toys.

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



Corporate Manufacturers Trends

Hasbro maintains its position as the #2 manufacturer after Lego. Hasbro has managed to close the market share gap with market leader Lego by 2 percent points closer compared to February 2017. Beyblade is key to Hasbro's success fueling the manufacturer's +20% growth YTD.

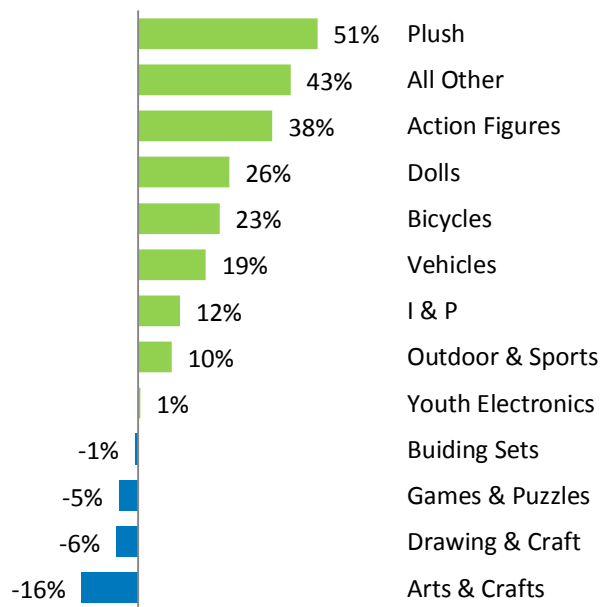


Top Distributors rank by Market Share

Category Trends

Most supercategories have seen growth in February vs. the prior period. This is led Plush which is the fastest growing supercategory in 2018 (+51% YOY). All Other Toys has also seen significant growth in the full year 2017 and its strong performance continues into February, driven again by Ooshies, Fidget Toys and Key Chains (Hatchimals and Ty Beanie Boos).

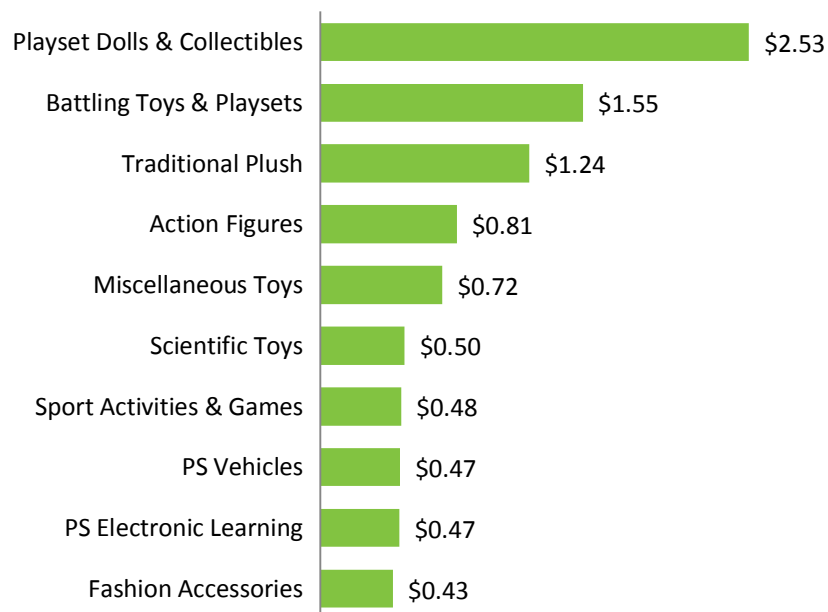
Value Change YTD



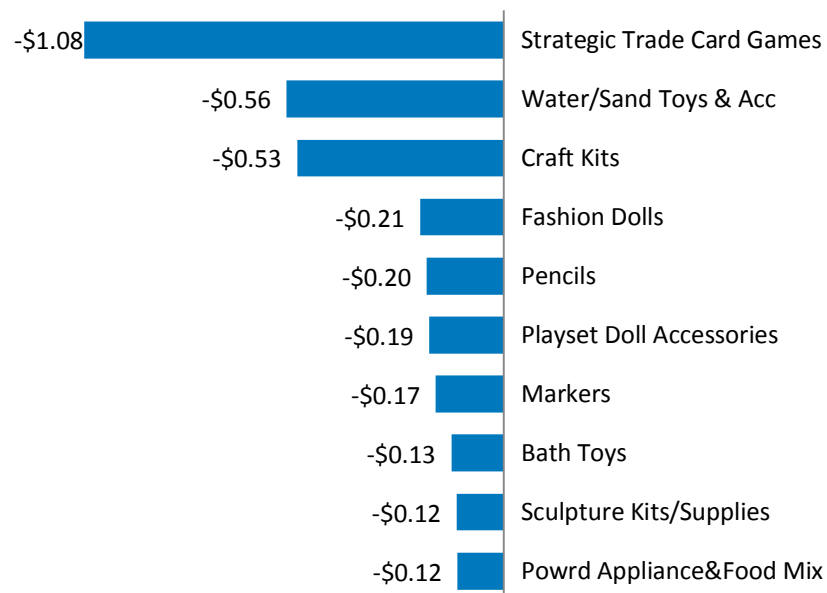
Subclass Trends

The Playset Dolls and Collectibles subclass continues to lead the growth of Toys on the back of Headstart's L.O.L. Dolls. Battling Toys & Playsets growth is driven by Hasbro's Beyblade (which is helping grow Hasbro's share of the Action Figures Super category in 2018 YTD from 48% to 58%).

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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