



# ATA Report

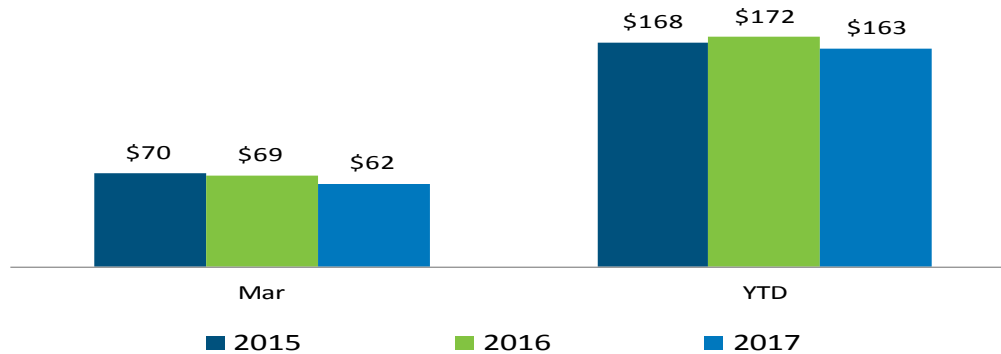
March 2017

Australia Toy Association

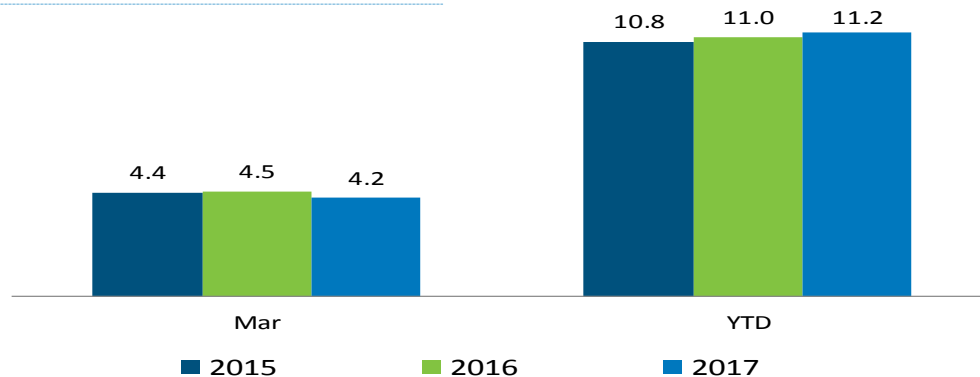
# Industry Trends

Last March was the lowest in sales in the last 3 years bringing the decline of the industry to 5.1% YTD in Value in spite of the growth in units of 1.7% YTD

## Value (\$m)

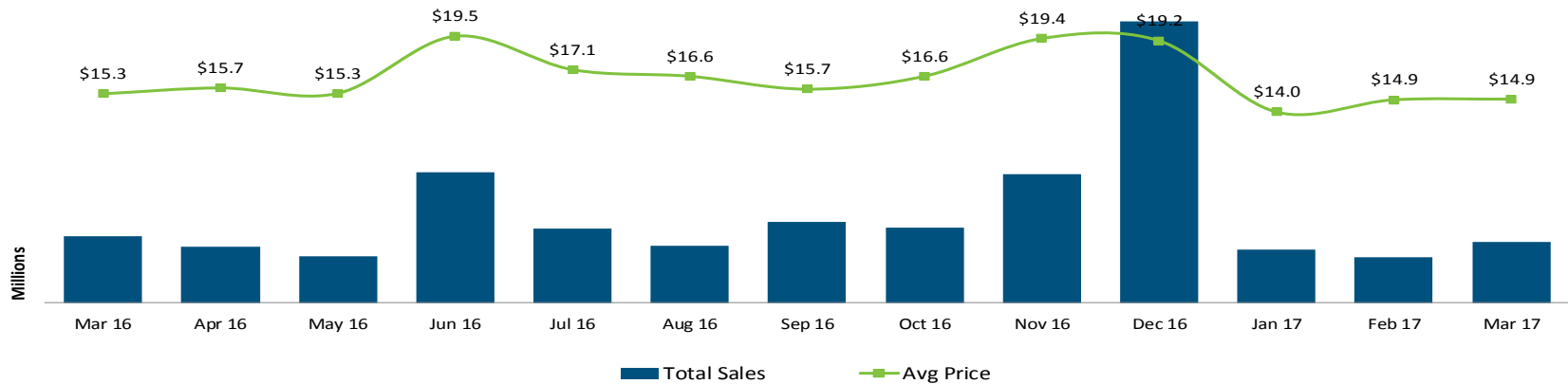


## Units (m)



# Monthly evolution of Average Price

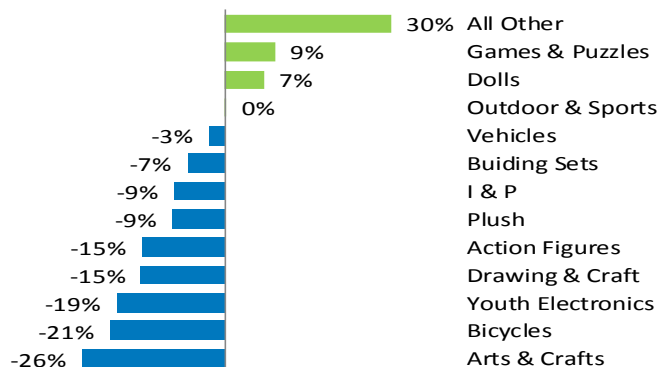
Monthly Value (\$m) and Average Price (\$)



Average price remains rather stable for the last 3 months, however, is more than \$1 dollar lower than a year ago reaffirming the focus the market is having towards lower price items across many categories

# Category Trends

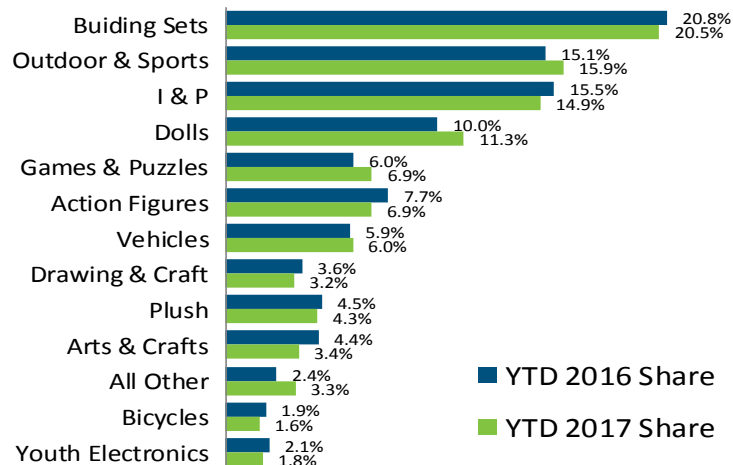
## Value Change YTD



After the first quarter of 2017, only Games & Puzzles and Dolls are growing in Australia. The main driver in Games & Puzzles continues to be the Strategic Trading Cards subclass and, in Dolls, the Collectibles and Playsets subclasses

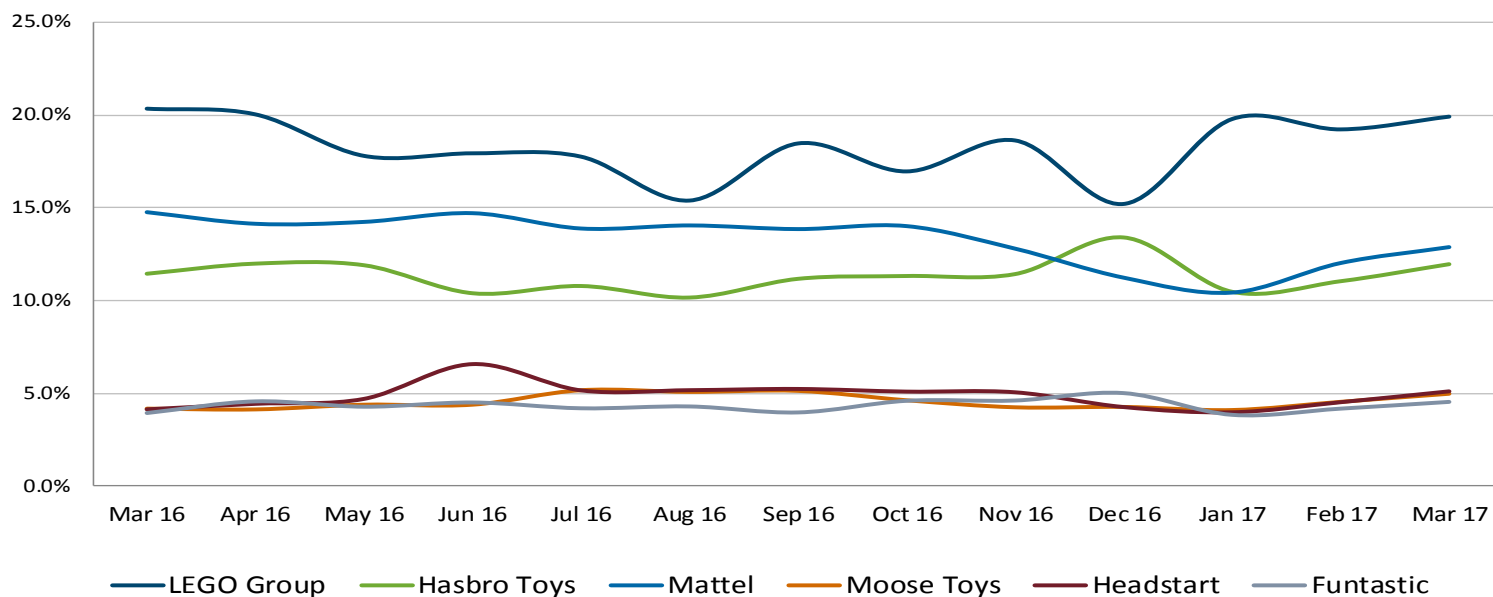
The biggest market share change took place in the Dolls category, thanks to new properties released in the second half of 2016.

## Category Share YTD



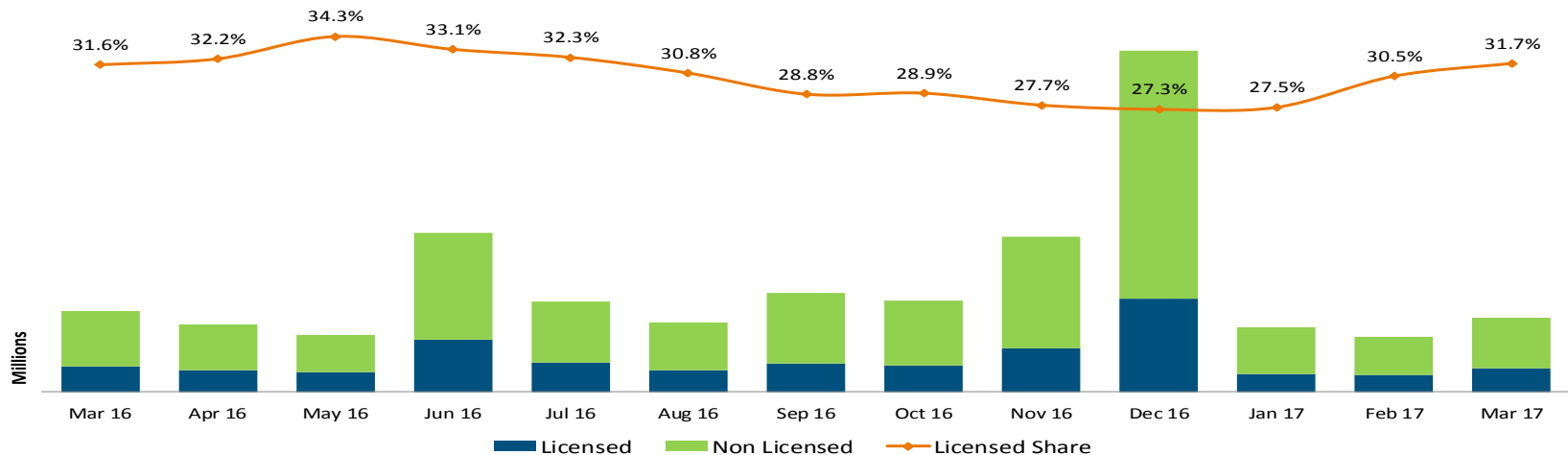
# Corporate Manufacturers Trends

## Top 6 companies distributing toys in Australia



In the top 20 monthly rank, there are 14 companies that are displaying negative growth. YTD ranks reveals that 12 companies are underperforming compared to 2016

# Licensing Trends



Rank	Licensor	YTD 2017 Share	% Change
1	Disney	5.4%	-15.6%
2	WBCP (Time Warner)	4.5%	137.1%
3	Lucas Licensing (Disney)	4.3%	-45.2%
4	Marvel Enterprises (Disney)	1.6%	-30.4%
5	Nelvana	1.5%	62215.7%
6	Nickelodeon	1.5%	59.7%
7	DreamWorks (NBCUniversal)	1.3%	669.8%
8	Nintendo	0.8%	81.2%
9	Spin Master (Corp)	0.7%	145.4%
10	Lamaze International	0.6%	52.1%

The share of licensing in Australia continues at the same levels as 2016. The expectation for this ratio is to be higher, particularly in the second semester with big titles from the film industry driving value in toys

## For more information

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