



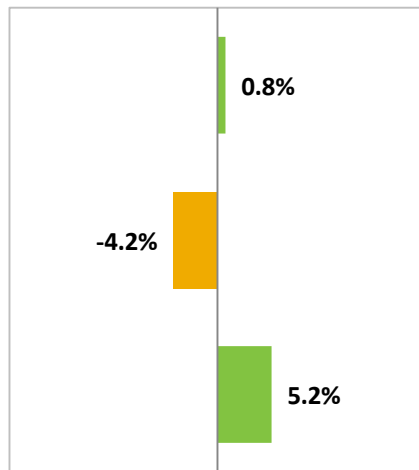
# ATA Report

May 2018

Australia Toy Association

# Industry Trends

While dollars remained flat for the month on month May comparison, units saw a slight decline. Outdoor & sports toys, the third largest category saw a slight decline in units but still grew in value. Vehicles had the strongest month on month decline out of all categories in both units and value. This decline can be attributed to the launch of Cars 3 movie at around the same time in 2017. Meanwhile YTD trends are still up, partly helped by an extra week in the 2018 calendar vs. 2017.

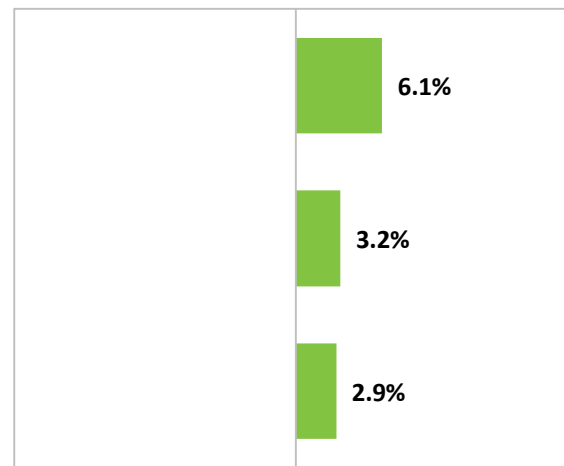


May % Change YOY

Dollars

Units

Avg Pr

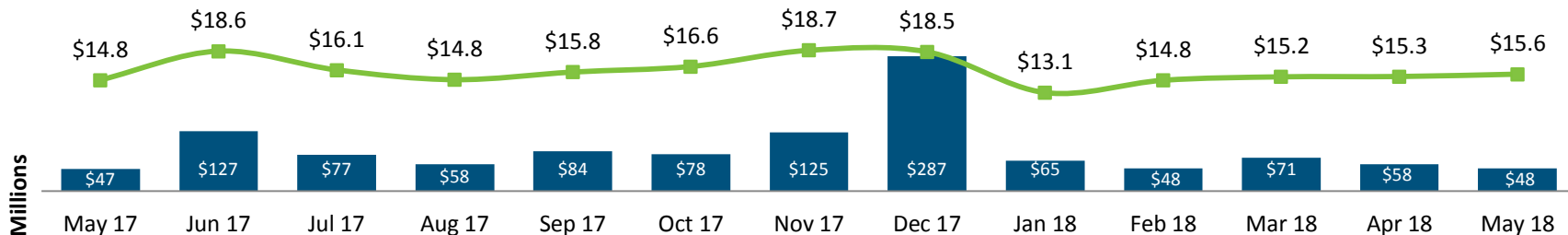


YTD % Change YOY

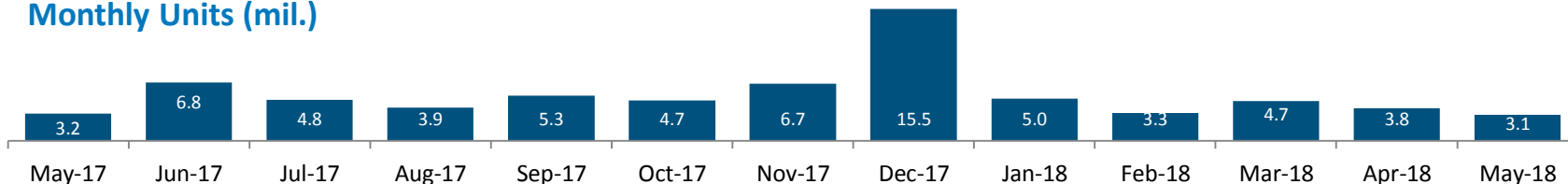
# Monthly Trend

Every month since Mar18, average prices had improved on last year's. Comparing May17 vs May18, the toys market saw a 5% growth in average prices. All categories saw an uplift in average prices except for Youth Electronics, Plush and Bicycles & Accessories. Jun18 will be one to watch as there was a strong uplift during last year's mid year toy sale (May17 vs. Jun17 saw a 26% average price increase)

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



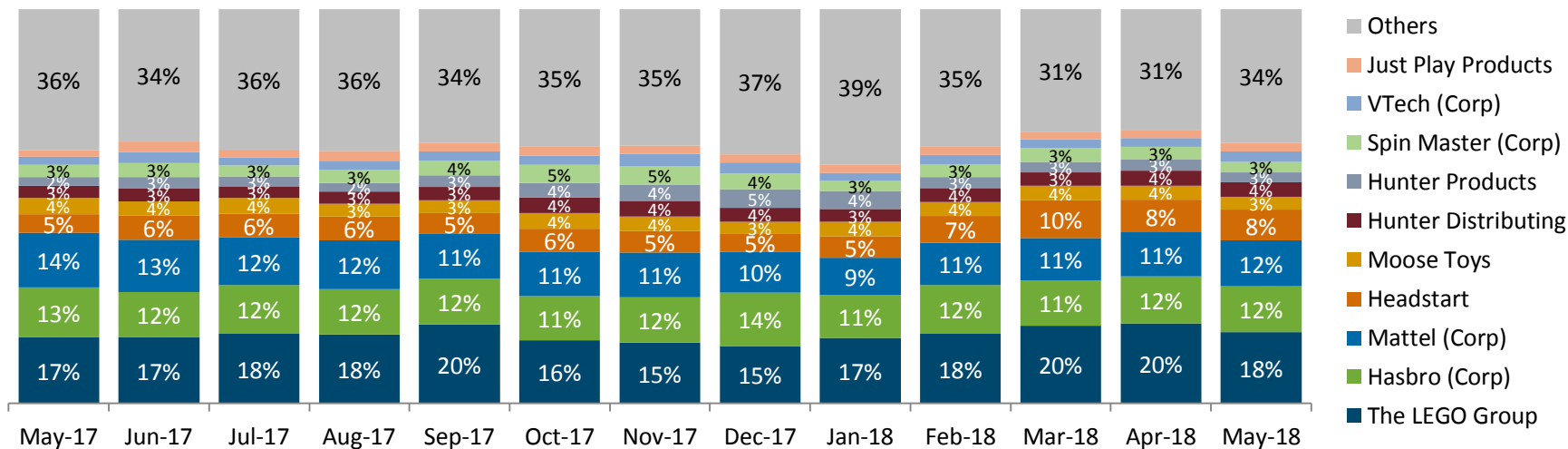
## Monthly Units (mil.)



# Corporate Manufacturers Trends

(ranked in value current YTD)

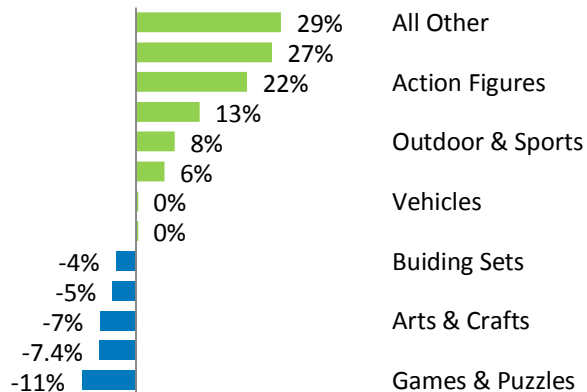
Lego lost 2 share points compared to last month. The uplift from Jurassic Park/World had not filled in the gap left by Star Wars so far. However, Lego still performed better than May last year in share and absolute value performance. Headstart had the largest absolute value increase compared to same period last year, driven mainly by L.O.L Surprise



# 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. 6 out of the top 10 sellers were squishies. In Dolls, L.O.L Surprise continued to be the star performer. Barbie coming in second saw an increase particularly within Fashion Accessories. Within Action Figures, the fifth largest supercategory, Beyblade continued to dominate, accounting for 28% of that super category. Within Plush, in second place Pikmi Pops was the fastest growing brand with 15% share of the category. Ty still the number brand within plush. Within outdoor & sports, Nerf still holds leadership and Laser X was the fastest growing brand.

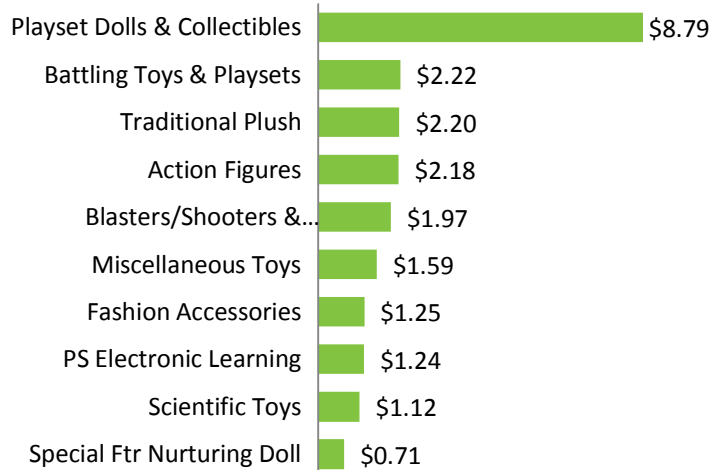
## Value Change YTD



# Subclass Trends

The average price for Playset Dolls and Collectibles went from \$9.32 to \$11.56 as this subclass continued to lead the growth of Dolls. The top 10 items sold, 6 were from L.O.L., 3 from Hatchimals and 1 from Moose Shoppies. Games/Puzzles category, Strategic Trade Card Games decline came from Pokemon. Despite the decline in Standard building sets, Star Wars Millenium Falcon was the top seller in value with an average price of \$1203.

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



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



# Property Trends

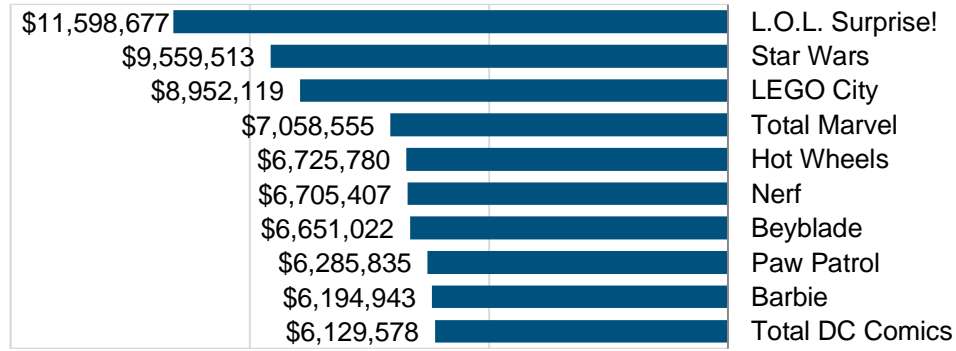
## Top 5 new properties YTD May17 vs. YTD May18

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

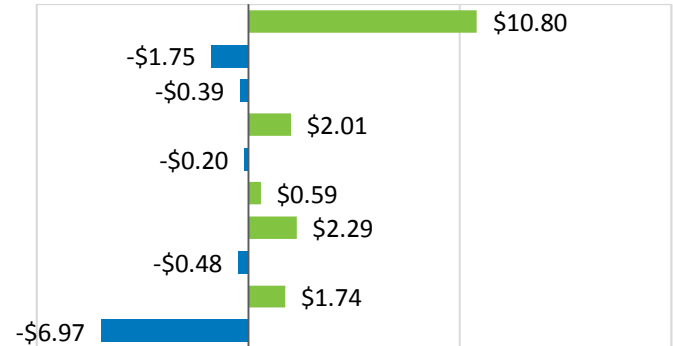
## Top 6 growth properties YTD May17 vs. YTD May18

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

## Top 10 properties in value YTD May17 vs. YTD May18



Sales value in \$mil.



Gain/loss in \$mil

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