



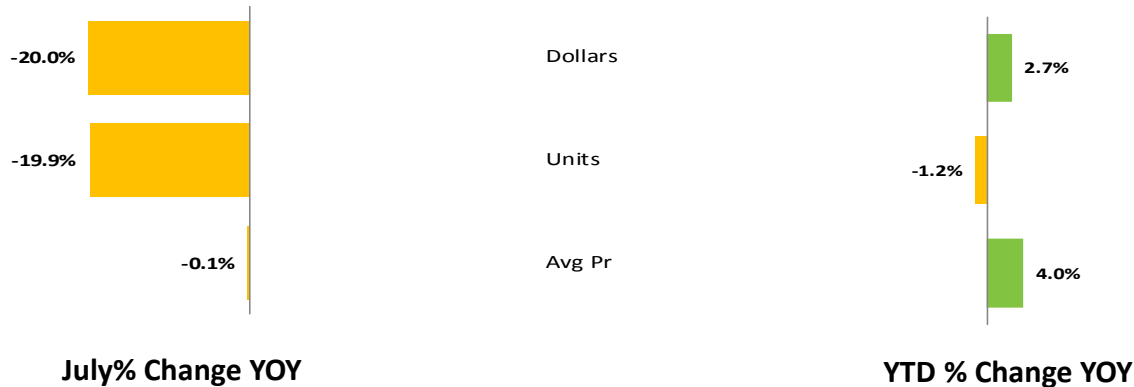
July 2018

ATA Report

Australia Toy Association

Industry Trends

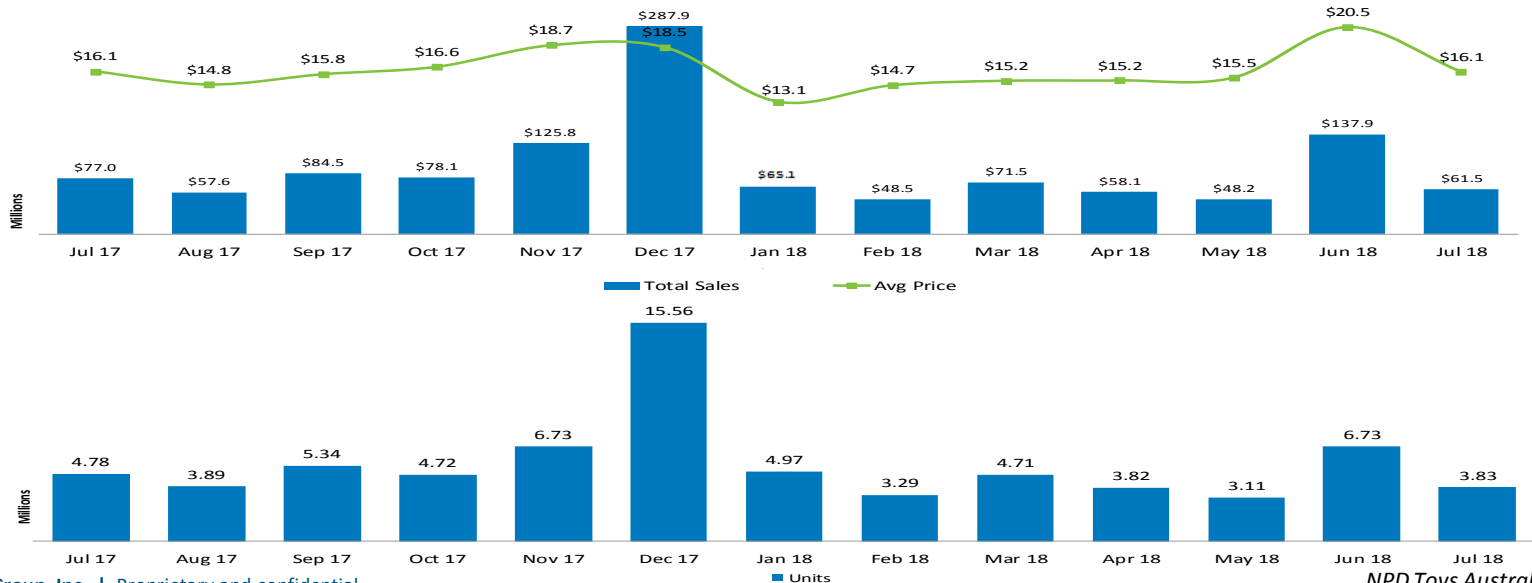
The decline in July can be attributed to a few factors: Toy sale in the previous month, differences in Toy cat weeks and the demise of TRU. Since there had been a flurry of events in the last couple of months combining June and July together, will give us a -3% decline in value and -9% decline in units. Average price comparisons showed a +8% increase from last year (Jun18-Jul18: \$18.90). Dolls, Arts & Craft and All Other Toys had double digit growth while ITP, Plush and Youth Electronics grew by single digit when we compared June-July 2018 vs June-July 2017.



Monthly Trend

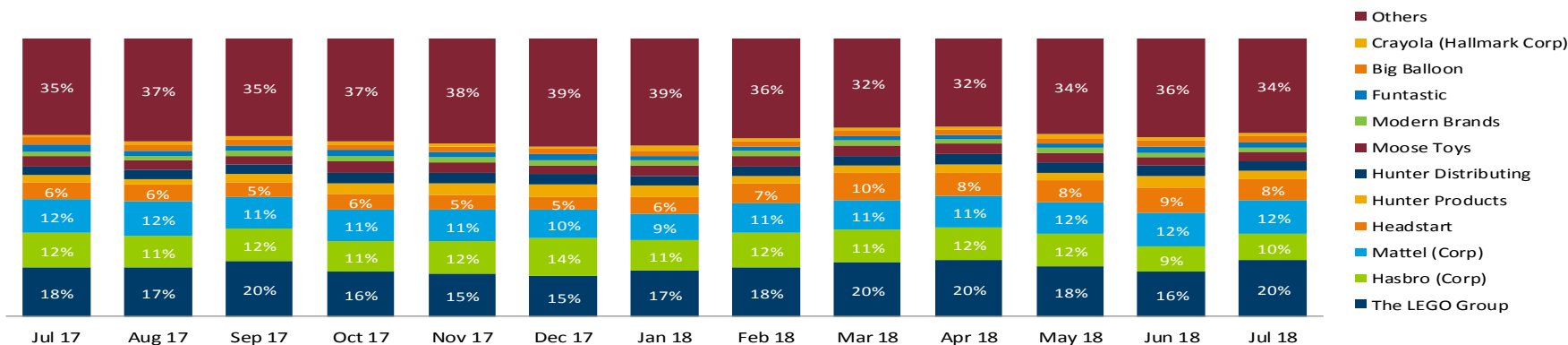
The July average price has remained flat on last year despite the double digit value and volume decline. The average price for Building sets, Dolls, Games/Puzzles and All Other Toys saw an increase compared to July17. All Other Toys in particular had the largest lift due to squishy toys.

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



Corporate Manufacturers Trends

Out of the top 3 manufacturers, Lego came out on top with -9% vs same month last year. Combining June & July vs. the same 2 periods last year, the impact on Lego was minimal at -1%. Headstart, Hunter Products, Hunter Distributing, Spin Master and Vtech experienced double digit growth, compared to the same two months last year. Despite the double digit decline in value in July 2018, Just Play outperformed the toy market at +20% vs. July17 and had 3% market share.

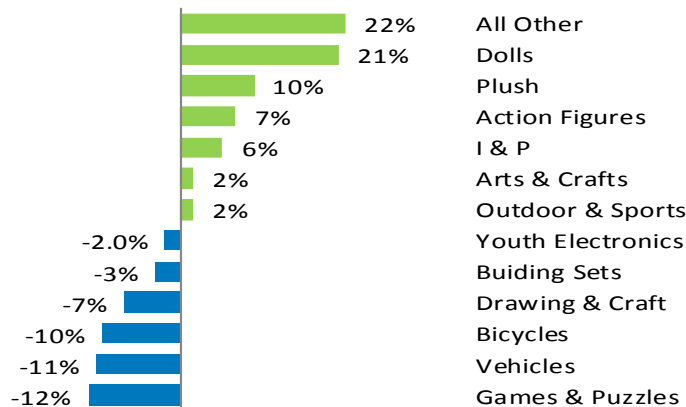


Top Distributors rank by Market Share

Category Trends

All Other Toys growth continued to be led by squishy toys. Within the Dolls category, L.O.L Surprise drove the playset dolls & collectibles subclass while Barbie drove the Fashion Accessories subclass. Growth within Plush was led by traditional plush +21% and Pikmi Pops from Moose was the key driver. Beyblade continued to maintain the leading position within Action Figures and Jurassic Park/World also became the 4th largest property in the month of July. The Incredibles became the 7th largest property, just behind Star Wars. Within Infant, Toddler & Preschoolers, PJ Masks was the largest property for the current year to date and month.

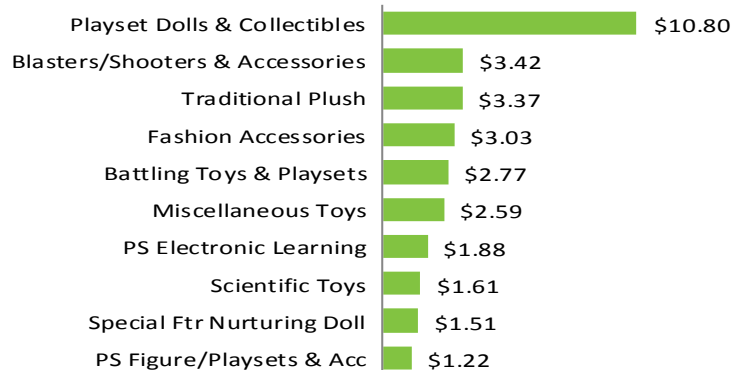
Value Change YTD



Subclass Trends

Playset Dolls and Collectibles continued to widen the gap with all the other subclasses. The top 3 items of the first 7 months of the year were L.O.L Surprise products. In the Blasters/Shooters & Accessories subclass, Nerf is being challenged by Laser X and X-Shot. Laser X is the third largest property within Outdoor & Sports Toys in the current year to date. Within Strategic Trade Card Games, the decline came from Pokemon. Disney Princess & Frozen continued to drive the decline for fashion dolls.

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



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



Property Trends

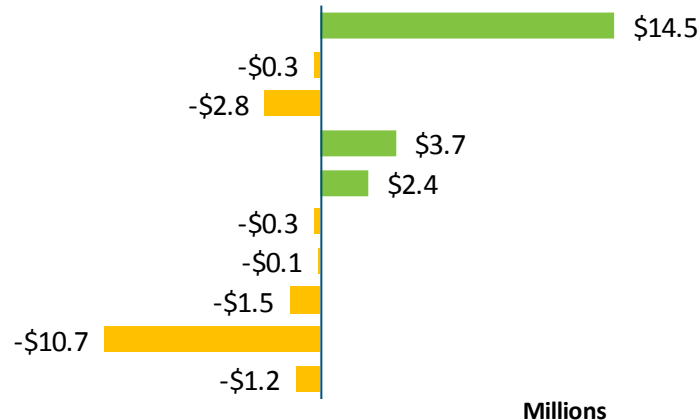
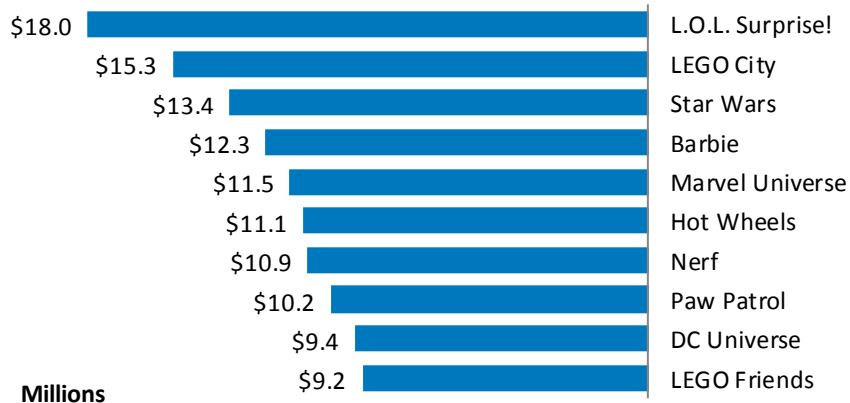
Top 5 new properties YTD Jul18 vs. YTD Jul17

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

Top 5 growth properties YTD Jul18 vs. YTD Jul17

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

Top 10 properties in value YTD Jul18 vs. YTD Jul17



For more information

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