



ATA Report

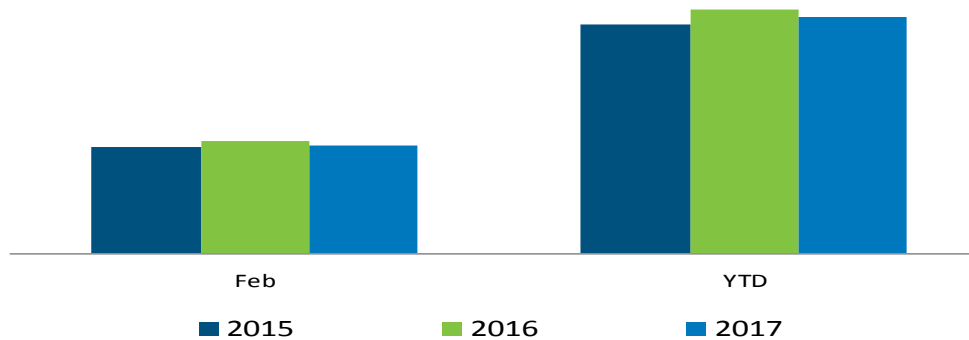
February 2017

Australia Toy Association

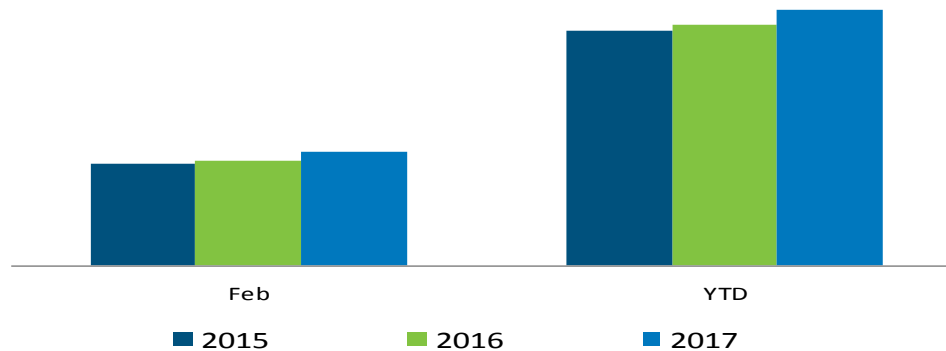
Industry Trends

February continued with the same trend seen in January: The market is declining -2.9% YTD in value while units continue growing: 6.7% YTD

Value (\$m)



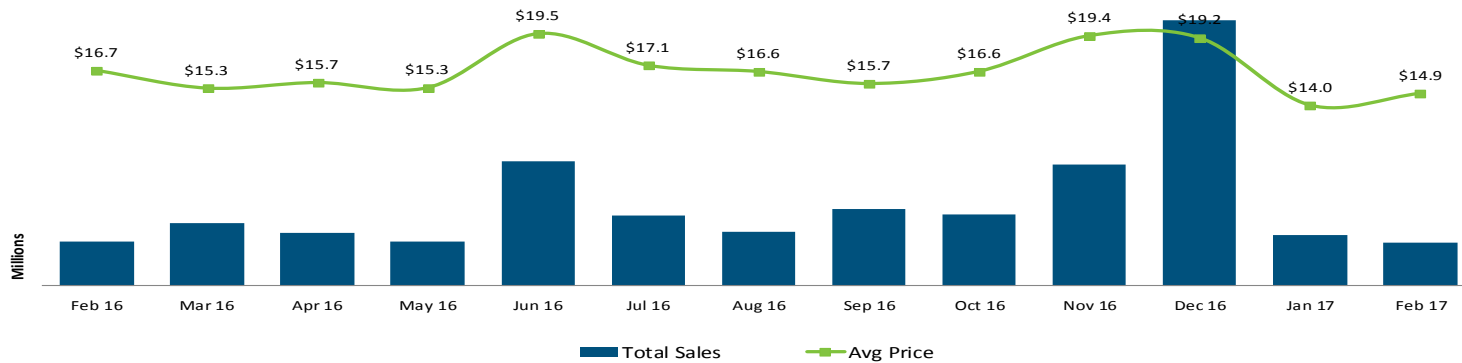
Units (m)



Industry Trends

Average retail price is lower than February last year by \$1.8 dollars. This is in line with the trend seen throughout 2016

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

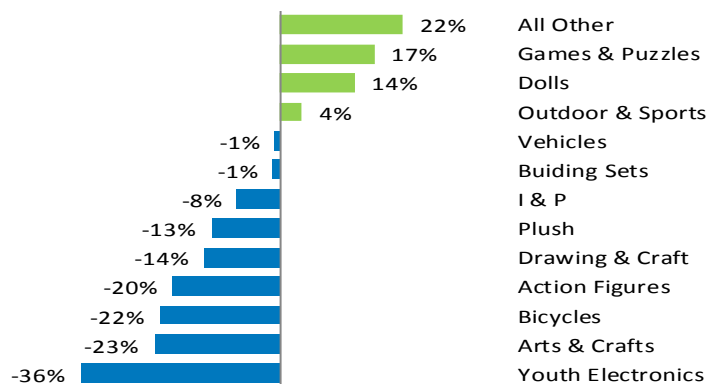


One strong reason to understand a decline of 10.78% is the fact that more collectibles are entering the market. The \$0 to \$10 price band has actually increase the share in units being sold.

Category Trends

4 categories are growing compared to the YTD Feb 2016.

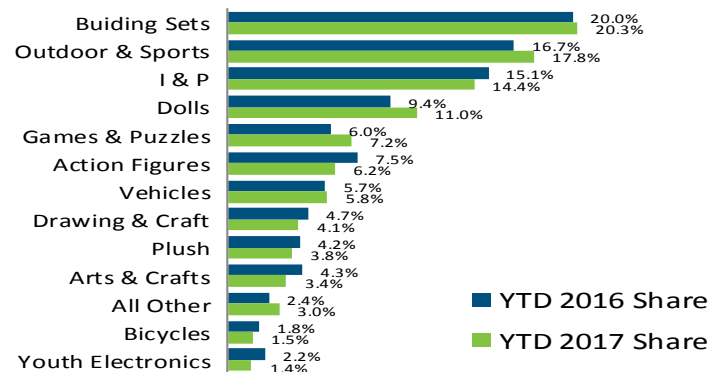
Value Change YTD



Building sets continue gaining market share in Australia followed by Outdoor & Sports and I&P Toys. Youth Electronics is sitting at the bottom and continue losing share in toys

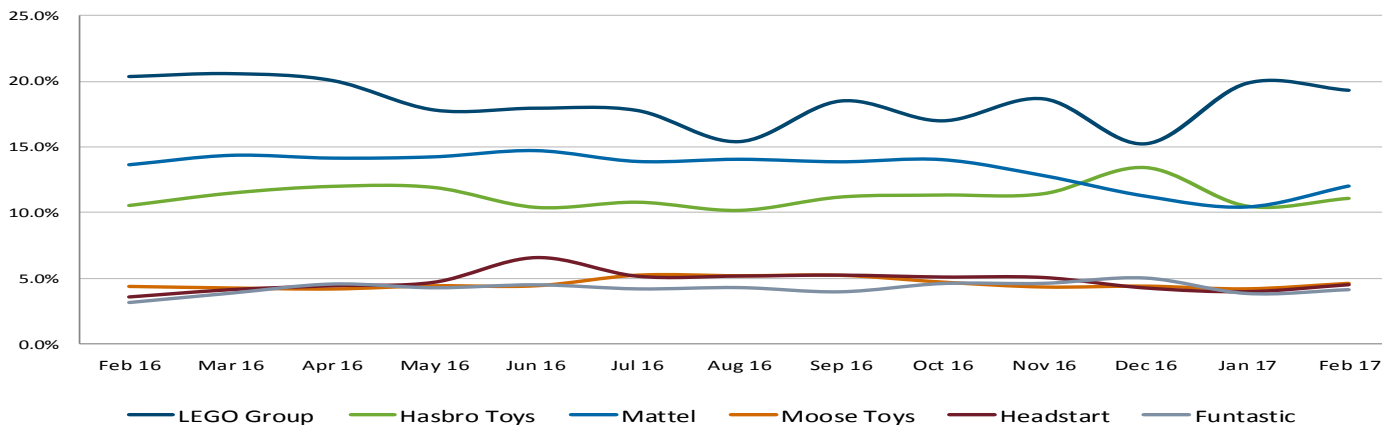
Games & Puzzles continue with double digit growth in 2017. Dolls is now growing thanks mostly to the collectibles segment

Category Share YTD



Corporate Manufacturer Trends

After the second month in 2017 Hasbro has closed up the gap with Mattel

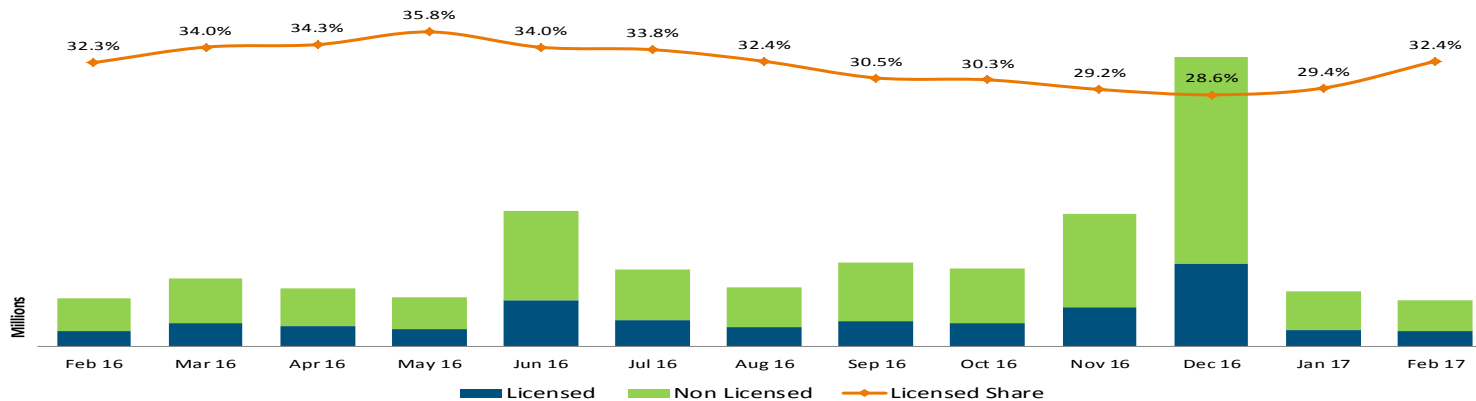


Rank	CorpManufacture	% Change
1	LEGO Group	1.6%
2	Mattel	-17.0%
3	Hasbro Toys	-5.6%
4	Moose Toys	-1.4%
5	Headstart	18.0%
6	Funtastic	14.1%
7	Hunter Products	16.2%
8	Hunter	-22.8%
9	Croftminster	51.7%
10	Big Balloon	-22.2%
11	Crayola	-17.3%
12	Modern Brands	-6.8%
13	Faber-Castell	-15.2%
14	Crown & Andrews	24.8%
15	Britz N Pieces	1.6%
16	Fountain Products	47.6%
17	Kids II	-18.1%
18	Playgro	-40.3%
19	Just Play Products	447.8%
20	MJM	26.9%

Amazing growth that Headstart and Funtastic are displaying with double digit. Croftminster continues capitalizing on the good moment of the license Pokemon

Licensing Trends

22.4% of the toys are licensed toys. This figure is 2.2 share point higher than it was back in February 2016



Rank	Licensor	YTD 2017 Share	% Change
1	Lucas Licensing (Disney)	5.1%	-42.2%
2	Disney	4.9%	-14.8%
3	WBCP (Time Warner)	3.8%	276.0%
4	Marvel Enterprises (Disney)	1.4%	-22.4%
5	DreamWorks (NBCUniversal)	1.4%	680.8%
6	Nickelodeon	1.4%	70.8%
7	M2 Entertainment	1.2%	108.1%
8	Nelvana	0.8%	45108.1%
9	Wil Film	0.7%	-46.7%
10	Spin Master (Corp)	0.6%	135.4%

For more information

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