



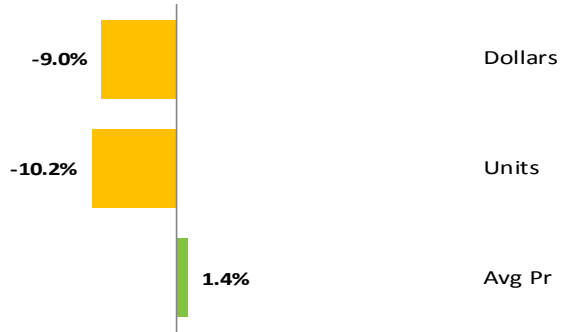
September 2018

ATA Report

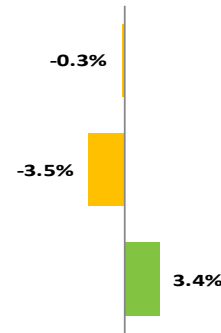
Australia Toy Association

Industry Trends

A slight improvement in September (-9% in value) compared to August where the market declined 12% in value month on month. As expected, the Outdoor category had the largest month on month decline, in particular playground equipment declining by more than half compared to September 2017. This segment of the market still remains as an opportunity area for Q4. Despite these high ticket items declining, average price still grew, helped by building sets and dolls. Collectibles is still an important part of the market and in the latest month, it accounted for 15% of toy dollar sales.



September % Change YOY



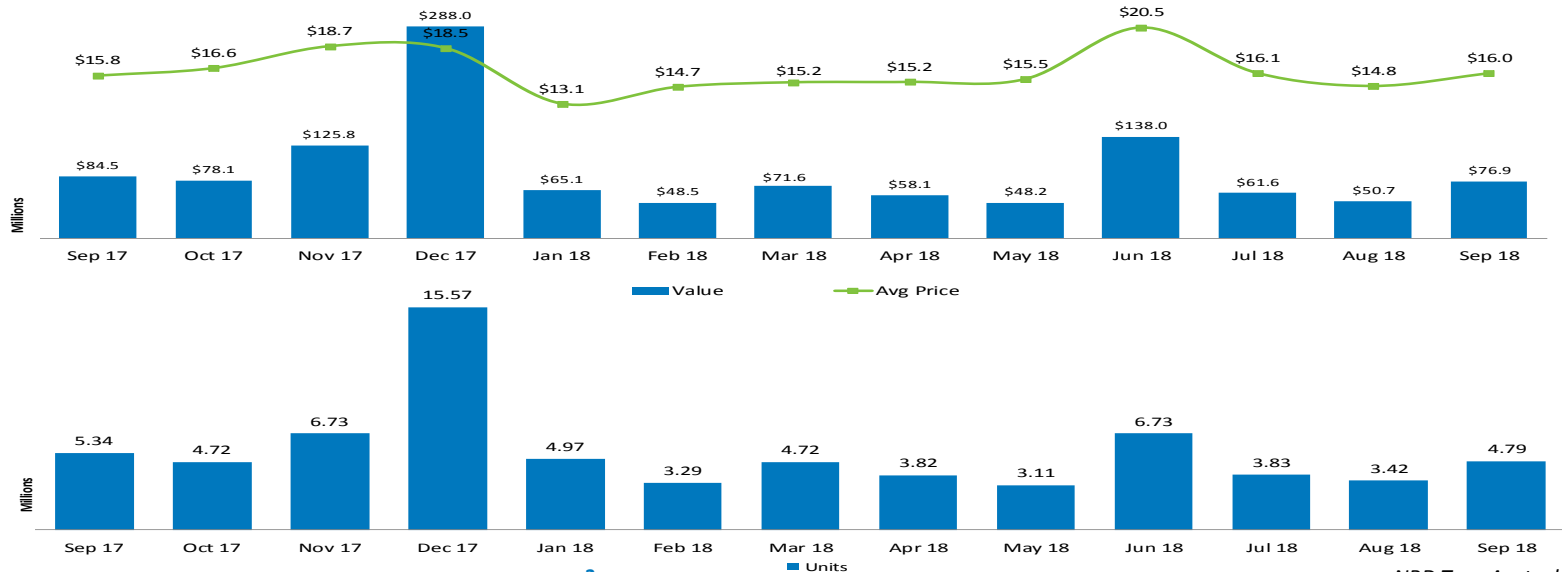
YTD % Change YOY

\$ share of Collectibles/Total Toys	Jan'17 - Sep'17	Jan'18 - Sep'18
Collectibles	10%	13%

Monthly Trend

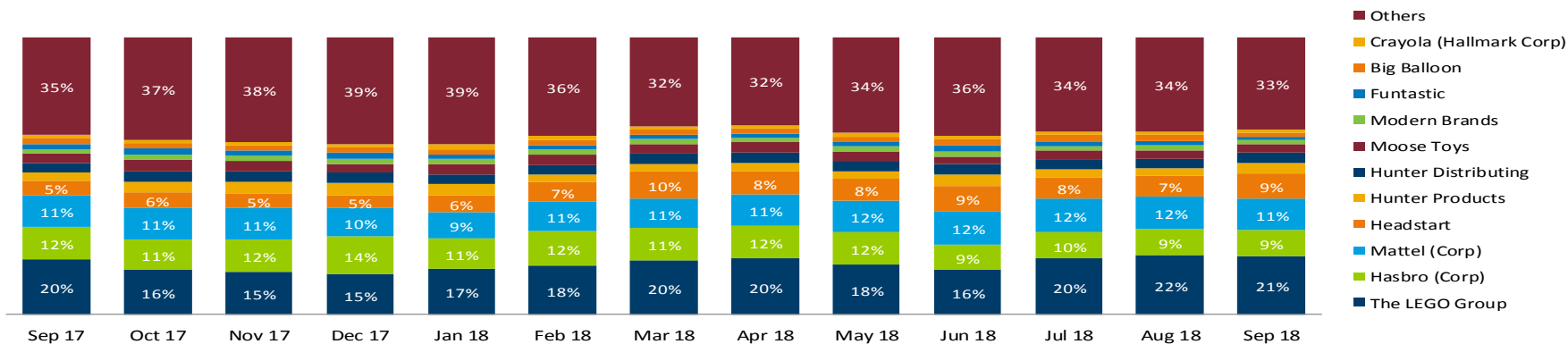
Month on month in September, 4 categories grew in value: Arts & Craft, Dolls, Youth Electronics and All Other Toys. We will see the market drop slightly in the month of October as it is a 4 week month vs. September being a 5 week month, but average price should continue to rise as we inch closer to the gifting season.

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



Corporate Manufacturers Trends

September was a strong month for Headstart as it grew by 88% compared to August 18 and by 52% compared to same month last year. L.O.L Surprise Under Wraps also became the number 1 seller in the month of September. This is also the first month Moose declined by a single digit in the last 15 months. Treasure X was their top seller in the latest month. Whilst Mattel and Lego maintained share compared to the same month last year, Hasbro lost 3 share points.

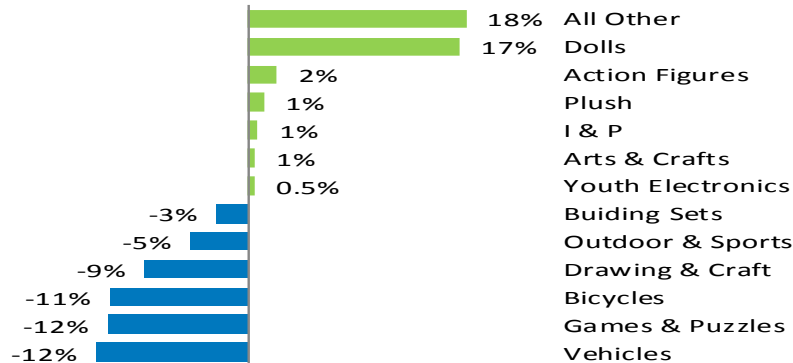


Top Distributors rank by Market Share

Category Trends

L.O.L Surprise still driving the Dolls category and this looks like it will continue for the rest of the year. Within Action Figures, Beyblade was still the main driver for growth year on year. All Other Toys continued to be driven by squishy products and Ooshies. The uplift within Arts & Craft was driven by a few brands such as Play-Doh, Cra-Z-Art and Oonies. Although building sets suffered a decline of 3% contributed mainly by Lego Star Wars and Friends, Lego had been successful with Harry Potter Fantastic Beasts Mini Figures. It was the number 3 seller in the month of September in volume.

Value Change YTD



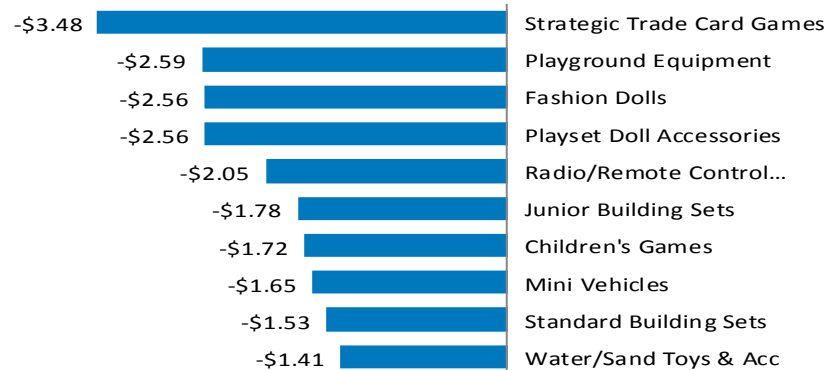
Subclass Trends

Moose continued to drive the traditional plush subclass with Pikmi Pops and Scruff A Luvs. The Barbie brand within fashion dolls grew but other brands such as Monster High, Ever After High, Shibajuku Girls and Betty Spaghetti had declined year on year. Preschool games was the fastest growing subclass within Games/Puzzles and was led by Elefun & Friends and Soggy Doggy.

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



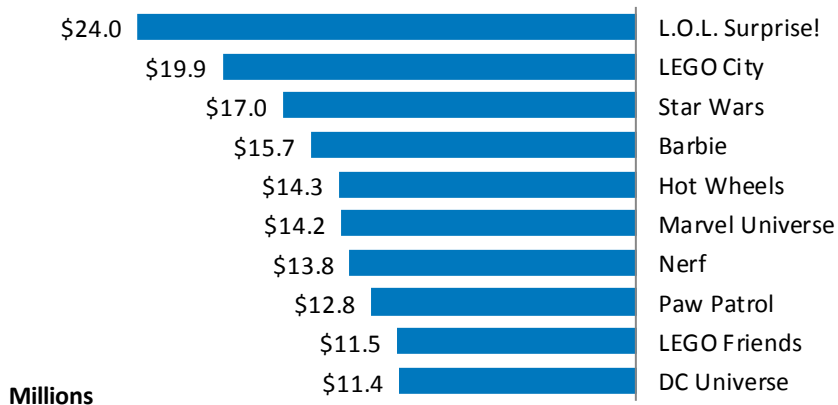
Fastest 10 Declining Subclass by Value-lost YTD (\$MM)



Property Trends

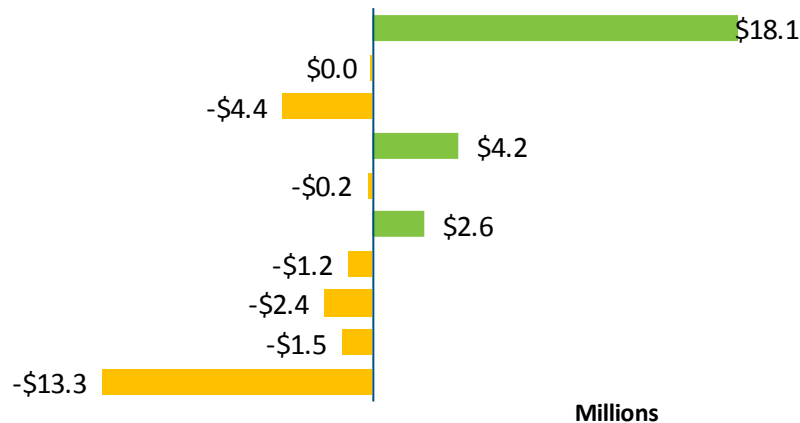
Top 5 new properties YTD Sep18 vs. YTD Sep17

- #1 – Lego Harry Potter
- #2 – Fingerlings
- #3 – Smooshy Mushy
- #4 – Soft N Slo Squishies
- #5 – Incredibles



Top 5 growth properties YTD Sep18 vs. YTD Sep17

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



For more information

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