



ATA Report

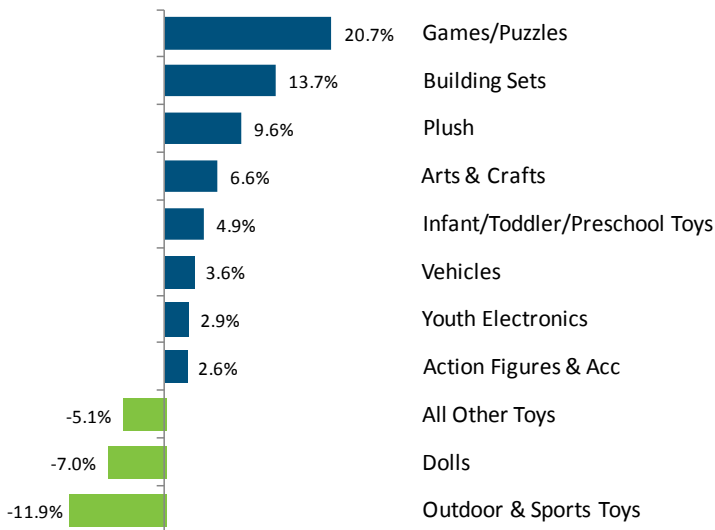
March 2016

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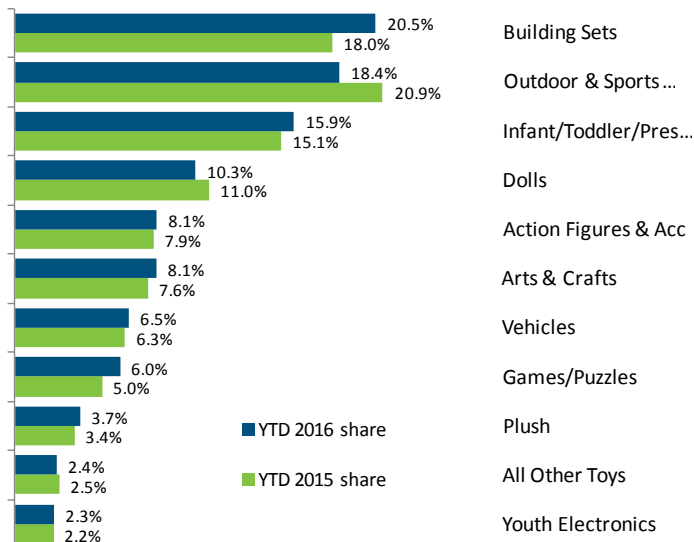
Category Trends

Value Change YTD



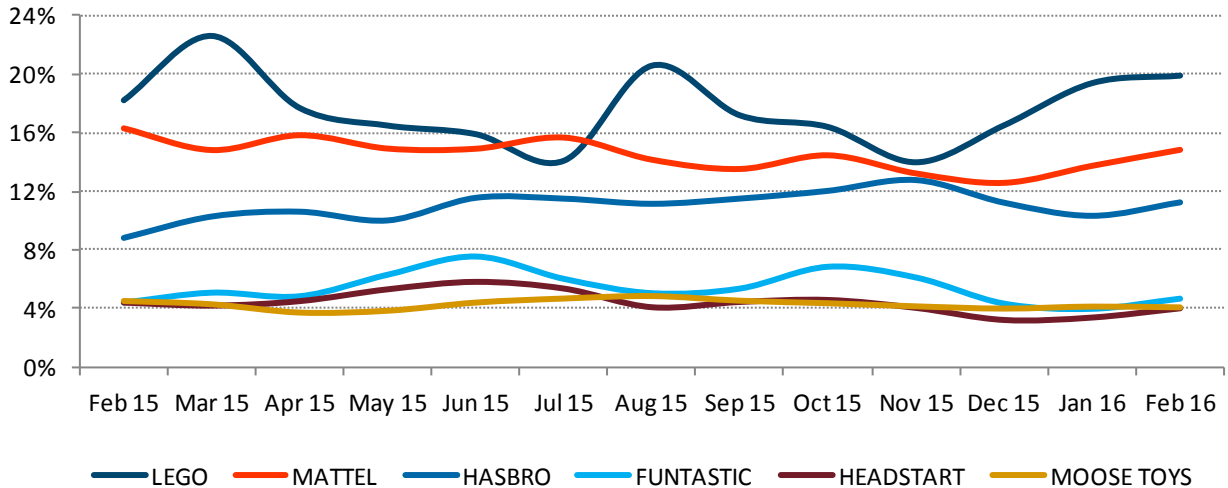
- 2015 was an phenomenal year for *Games & Puzzles* and the first quarter of 2016 continues with the momentum showed last year.
- Amazing turn around for *Plush* growing at 9.6%. This is particularly interesting as this category had a double digit decline during 2015
- *Youth Electronics* has lost a bit of steam after a couple of years of double digit growth.

Category Share YTD



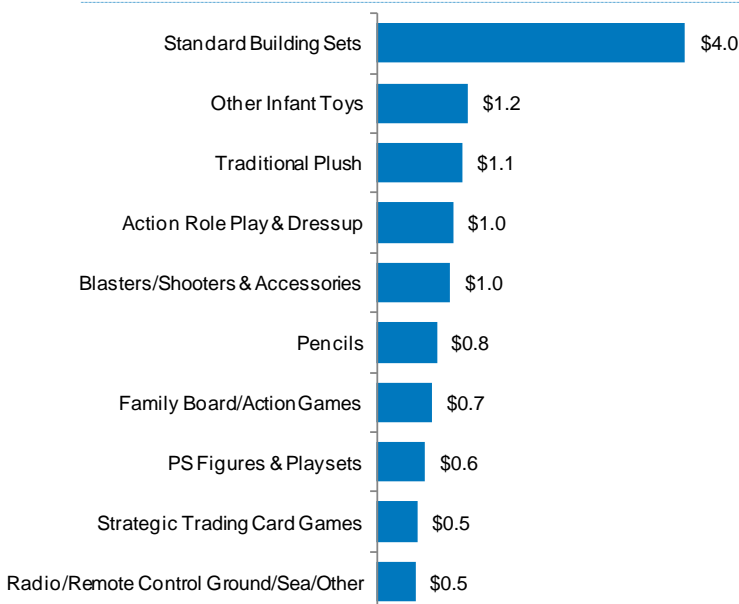
- As anticipated last year, it was a matter of time before *Building Sets* would become the biggest toys category in Australia. Lego's performance added up to the seasonality of *Outdoors & Sports Toys*, positions *Building Sets* at the top after the first quarter of 2016.
- Photo finish for the 5th position in the category share rank between *Action Figures* and *Arts & Crafts* with both closing at 8.1% market share.

Distributor Trends



Double digit decline in the top ten distributor ranking for Big balloon and Hunter Products. On the other hand Modern Brands continues escalating positions (9th in March) with an impressive performance from Sylvanian Families and X-shot that have added significant value and growth to the Sydney based company.

Fastest 10 Growing Minor-Categories by Value-added YTD (\$m)



Star Wars and City properties continue leading the minor category *Standard Building Sets* phenomenal growth.

The recently released range Disney Tsum Tsum is making the Traditional Plush minor category grow faster than a year ago.

Other Infant Toys growth is being led by Fisher Price range of properties and Bright Starts.

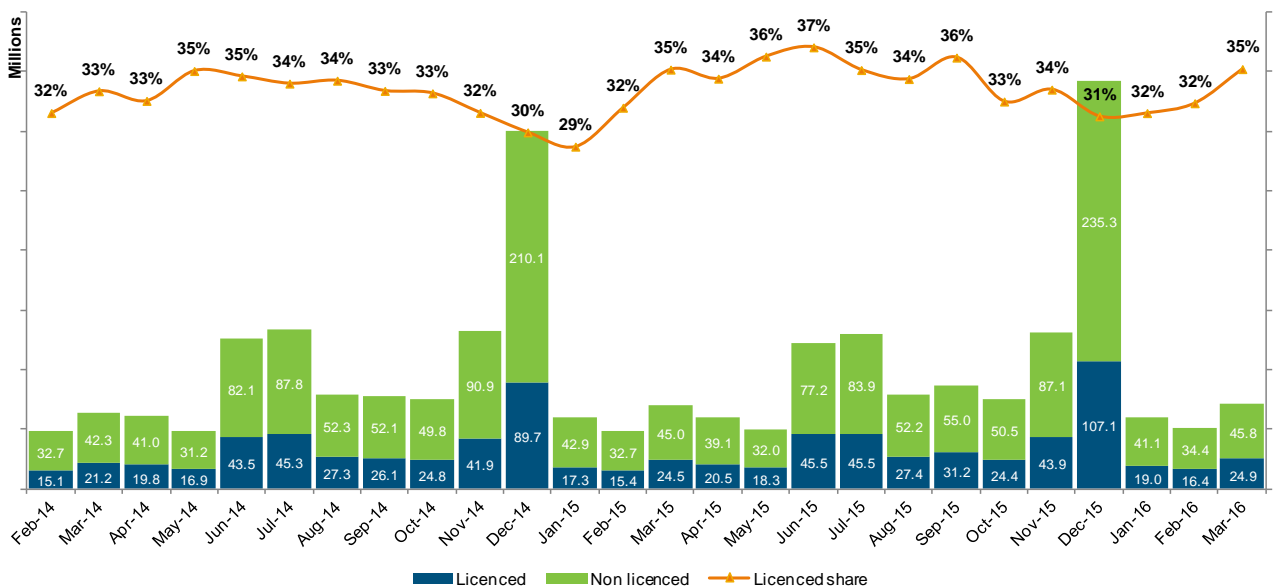
Property Trends

Rank Mar-16	Top 20 Properties	Rank Feb-16	Rank Jan-16	Rank YTD
1	Star Wars	1	1	1
2	City	2	2	2
3	Shopkins	3	5	3
4	Thomas & Friends	6	6	4
5	Paw Patrol	9	14	7
6	Friends	5	11	5
7	Super Heroes	22	51	15
8	Disney Princess	16	15	14
9	Disney Frozen	10	12	10
10	Fisher Price	4	10	6
11	Hot Wheels	12	13	12
12	Barbie	7	9	8
13	Duplo	11	31	16
14	Nerf	13	7	13
15	Nexo Knights	17	148	27
16	Ninjago	8	8	11
17	Crayola	15	3	9
18	Pokemon	24	40	25
19	Creator	18	32	21
20	Little Tikes	19	19	19

It seems this year will be dominated by Star Wars thanks to the new trilogy, but also to the new productions that live in the Start Wars universe such as Rogue One (movie that will see the light towards the end of 2016).

Nexo Knights from Lego has made the most notorious jump in the properties ranking reaching the 15th position in March and 27th YTD.

Disney Frozen continues in the top 10 ranking for properties in spite of the decline in the *Dolls* category.



The share of toys between licensed and non-licensed sits at the end of March at 35% vs 65% respectively. This ratio was the same in March 2015.

The biggest licensor is Lucas Films with 7.5% share in the toys industry followed by Walt Disney and the range of properties associated to either movies or TV shows. In third place Marvel, with a 2.3% share of toys has gained some market share thanks to the upcoming movie Captain America Civil War.

Thank You



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