



ATA Report

January 2017

Australia Toy Association

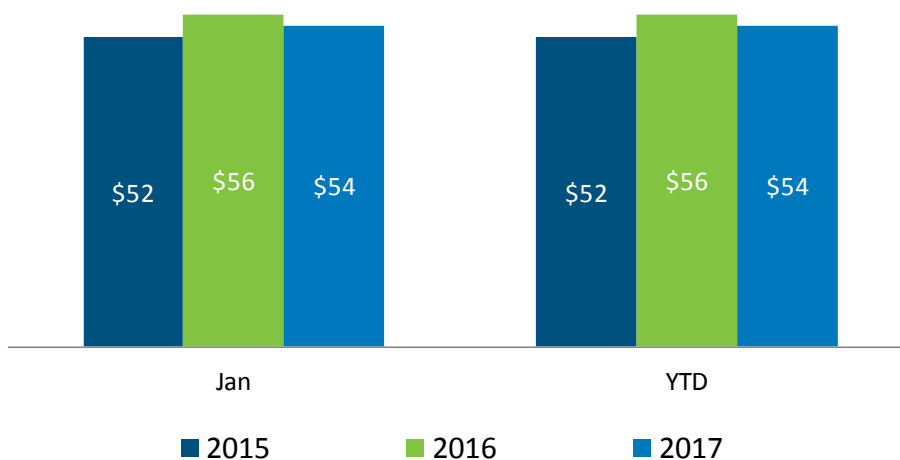
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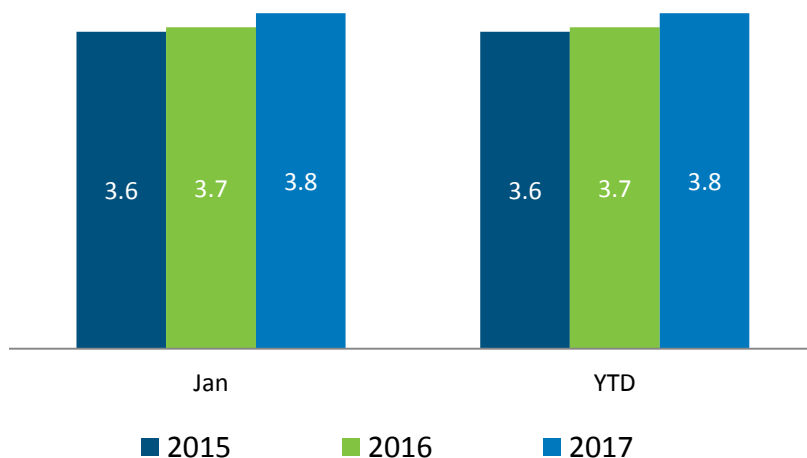
Industry Trends

With a decline of 3% in Value and growing 4% in units, Toys in Australia started 2017 under a new categorization system

Value (\$m)



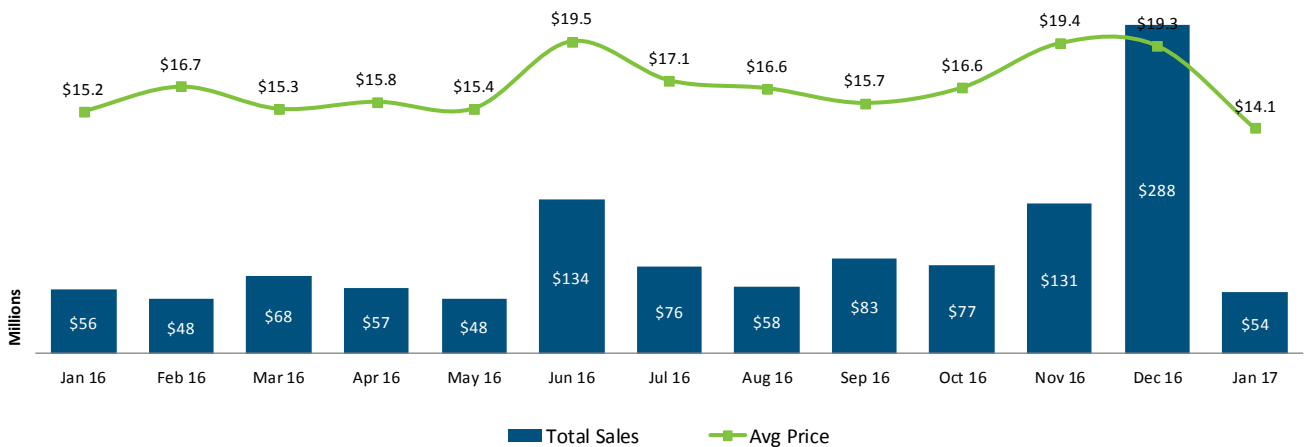
Units (m)



Industry Trends (Monthly)

This slide shows the movement of the ARP for the last 13 months

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

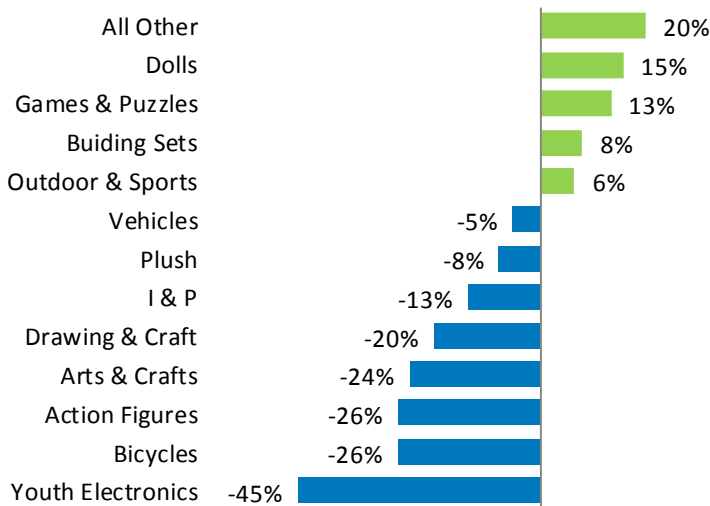


Average price started with a decline of -7.1% when compared to January 2016. A stronger focus on the lower price bands continues trending in this new year

Category Trends

Mixed results across the industry with 5 super categories growing while the remaining 8 didn't have an ideal start of 2017

Value Change YTD

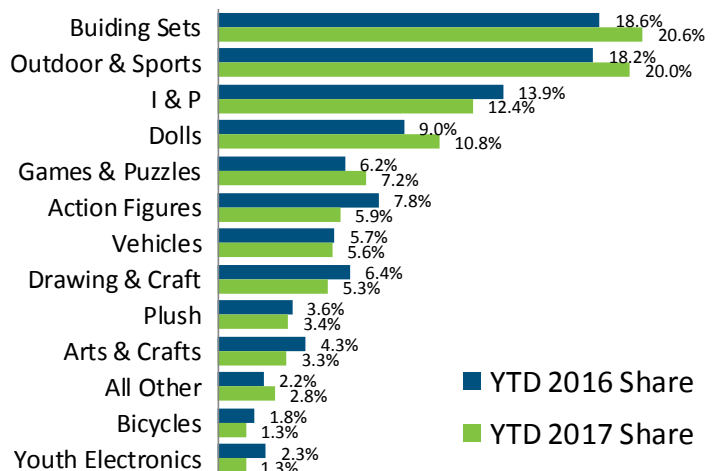


January started with unfamiliar results such as All Other Toys having a 20% change YOY.

Youth Electronics sits at the bottom of the category growth rank losing 45% compared to Jan2016

Category Share YTD

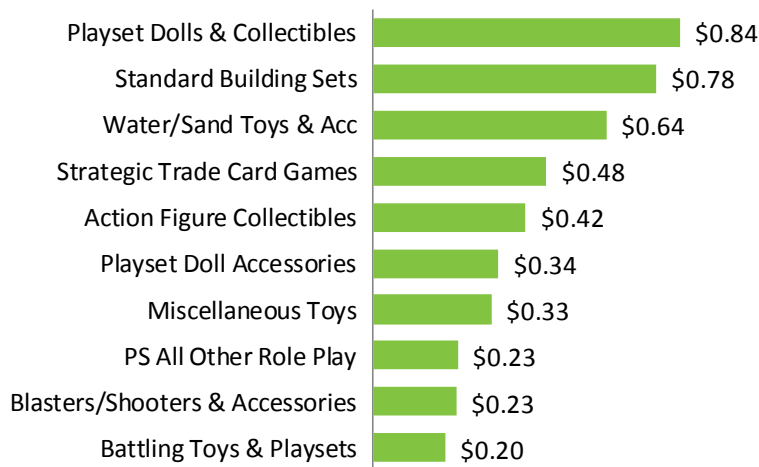
During the first month some categories are increasing their market share in toys such as *Building Sets, Outdoor & sports* and *Dolls*



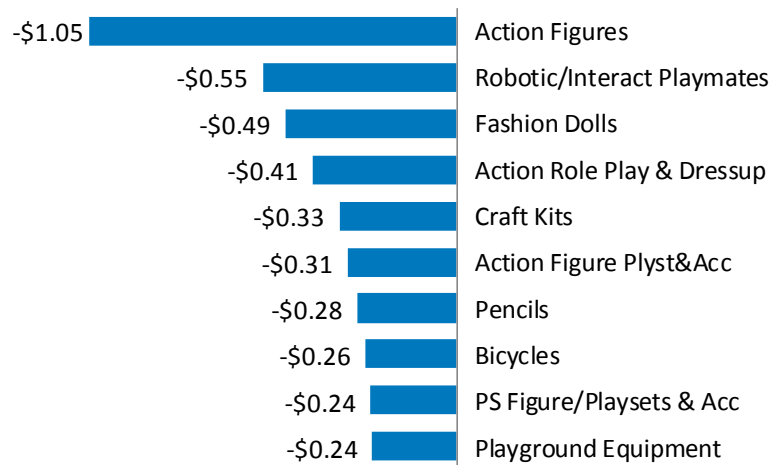
Subclass Trends

Collectibles continue trending and adding value to the industry. Nexo Knights is also adding value to Standard Building Sets

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



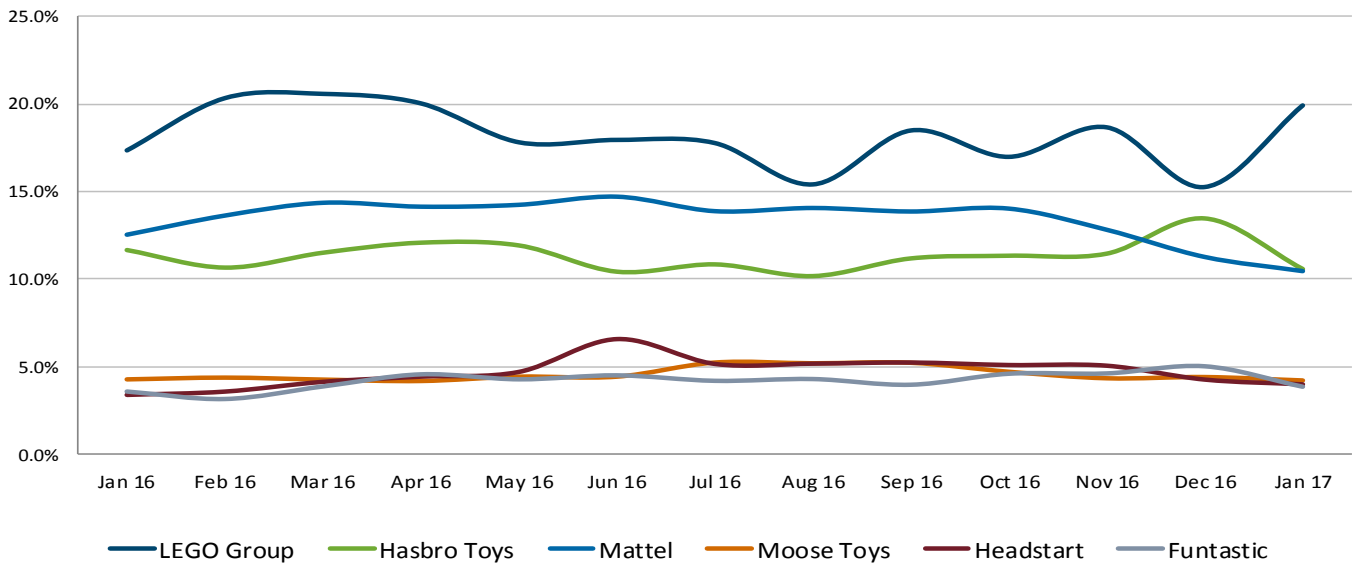
Fastest 10 Declining Subclass by Value-lost YTD (\$MM)



Corporate Manufacturers Trends

Top 6 companies distributing toys in Australia continue

Market share shows Lego at the top for the last 13 months followed by Mattel an Hasbro. Moose, Headstart and Funtastic fighting for the 4th place

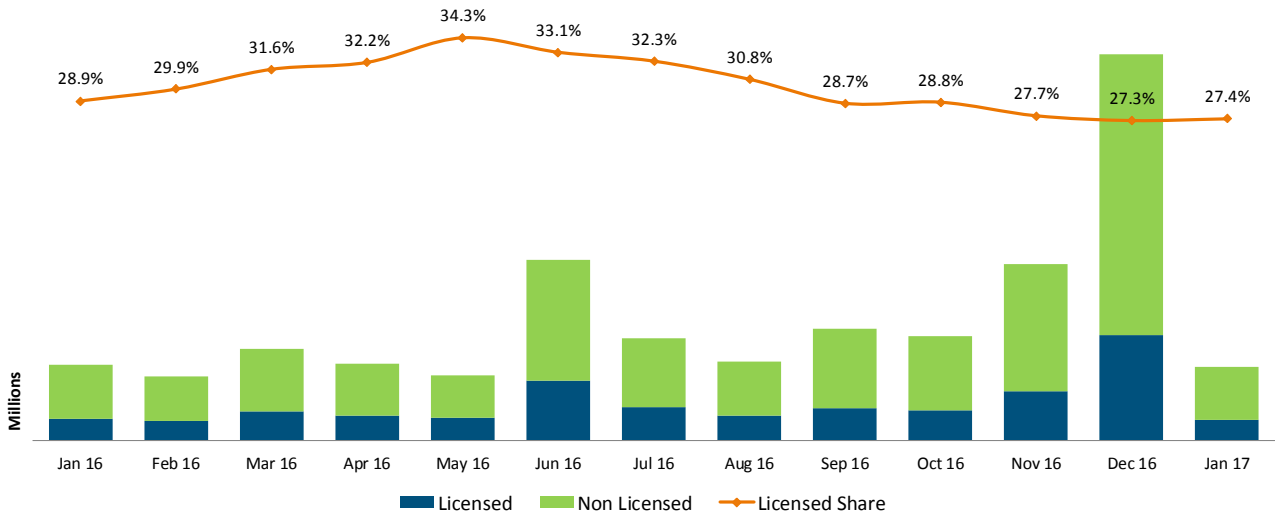


Rank	CorpManufacture	% Change
1	LEGO Group	11.3%
2	Hasbro Toys	-12.1%
3	Mattel	-19.0%
4	Moose Toys	-4.6%
5	Hunter Products	20.7%
6	Headstart	14.4%
7	Funtastic	4.4%
8	Hunter	-21.5%
9	Crayola	-24.3%
10	Faber-Castell	-16.6%
11	Big Balloon	-27.4%
12	Modern Brands	-1.7%
13	Zuru	-2.9%
14	TOMY	-10.4%
15	VTech	-16.5%
16	Banter Toys	-5.8%
17	Britz N Pieces	4.0%
18	Zoggs	37.4%
19	Crown & Andrews	33.1%
20	Croftminster	2129.2%

8 companies in the top 20 rank started the year growing. Special mention to Croftminster that had a phenomenal 4 digit growth.

Licensing Trends

Licensing share had a decline when compared to non licensed toys: 1.5 share points less than in Jan 2016



Rank	Licensor	YTD 2017 Share	% Change
1	Lucas Licensing (Disney)	6.2%	-36.7%
2	Disney	5.0%	-11.1%
3	WBCP (Time Warner)	2.8%	317.2%
4	DreamWorks (NBCUniversal)	1.5%	682.8%
5	Marvel Enterprises (Disney)	1.5%	-9.9%
6	Nickelodeon	1.4%	78.6%
7	Nintendo	0.6%	1235.3%
8	Spin Master (Corp)	0.6%	180.3%
9	Microsoft	0.5%	-55.7%
10	Feld Entertainment	0.4%	9.4%

For more information

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