

OzToys ATA Report

Australia Toys

March - April 2015 Issue

AUTOMOTIVE

BEAUTY

CONSUMER ELECTRONICS

ENTERTAINMENT

FASHION

FOOD / FOODSERVICE

HOME

LUXURY

MOBILE

OFFICE SUPPLIES

SPORTS AND LEISURE TRENDS

TECHNOLOGY

TOYS

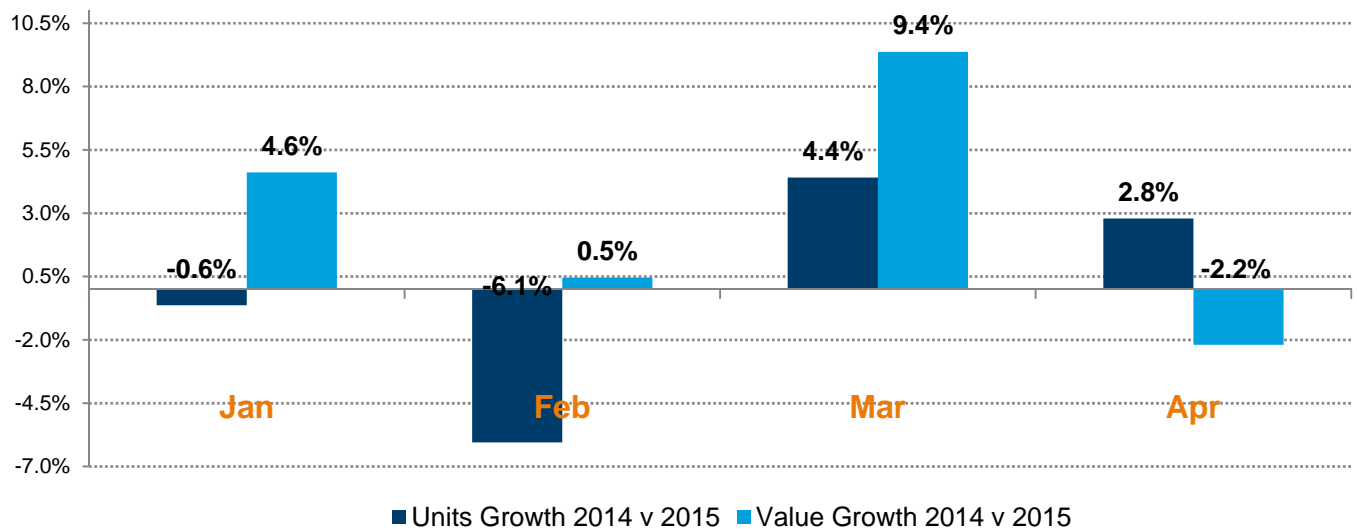
VIDEO GAMES

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Behind Every
Business Decision

Industry Trends

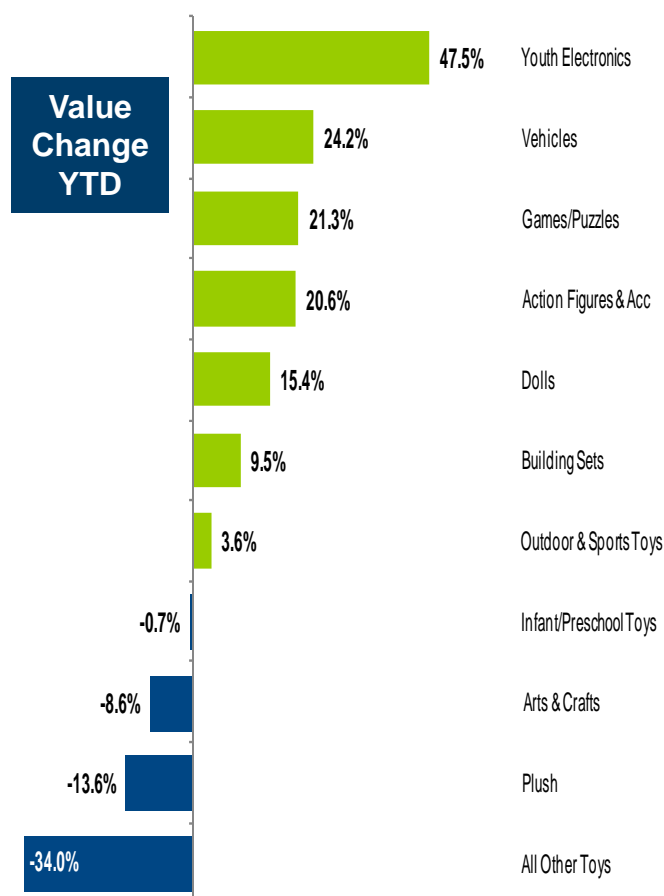


This month by month graph shows that during the first three months of 2015 value grew faster than units. This trend was carried over from 2014 with two major explanations: on one hand people were buying higher priced items and, on the second, more licensed toys were being purchased, also driving more value with less units sold.

However, last month (April) the situation was completely the opposite, not only did units grow faster than value, but also, value had a decline (units grew 2.8% and value declined -2.2%)

To better understand this effect we looked at price bands to see which properties made an impact in the \$0-\$10 and \$10 - \$20 bands. The results shows that Hot Wheels and Shopkins were the major drivers in terms of units.

Category Trends



- Youth Electronics continues at the top as the fastest growing category in the toys industry

- Very good first quarter for vehicles with a value change of 24%, in which the market has seen good performance from Hot Wheels, Monster Jam and exclusive brands

- Games & Puzzles started the year very strong and with Properties such as Pokemon (in the Trading Cards minor category), Monopoly and Disney Frozen, strong performances, this category close a fantastic first quarter.

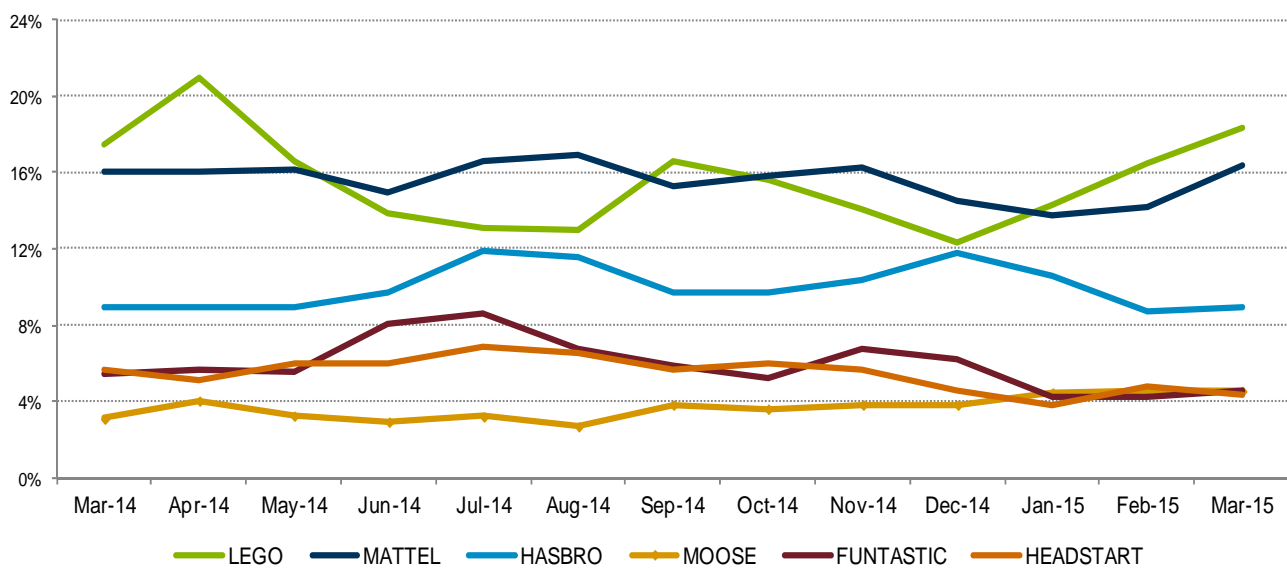
- In Art & Crafts the loom effect has slowed down and the immediate consequence is this category showing a decline when compared to the first quarter of 2014.

- Building Sets continue its growth and getting closer to be the biggest category in toys with 270 basis point separating them from Outdoor & Sports Toys.

Distributor Trends

The major significant change in the YTD ranking is Moose taking the 4th position and a value change of almost 60% compared to the period Jan-Mar 2014..

The most noticeable value change in the top 10 ranking is Crayola with a phenomenal 167% growth versus the first quarter of 2014.



Lego and Mattel (after the take over of Mega Brands) for the first place in the Australian toys Industry looking solid in the first and second place respectively.

Funtastic and Headstart typically ranking 4th and 5th are now facing the growth of Moose (company that is having a phenomenal performance thanks to its innovative approach

Property Trends

Some of the best performing properties in 2014 continued their positive trend at the end of the first quarter on 2015 such as Shopkins, Disney Frozen and Minecraft. Other properties are still enjoying the aftermath of blockbuster movies and are driving significant sales on this period analysed: TMNT and Transformers and even Avengers with the movie being released this month.

Barbie and Monster High even though they still rank high, Shopkins performance is currently number one in the Dolls category.

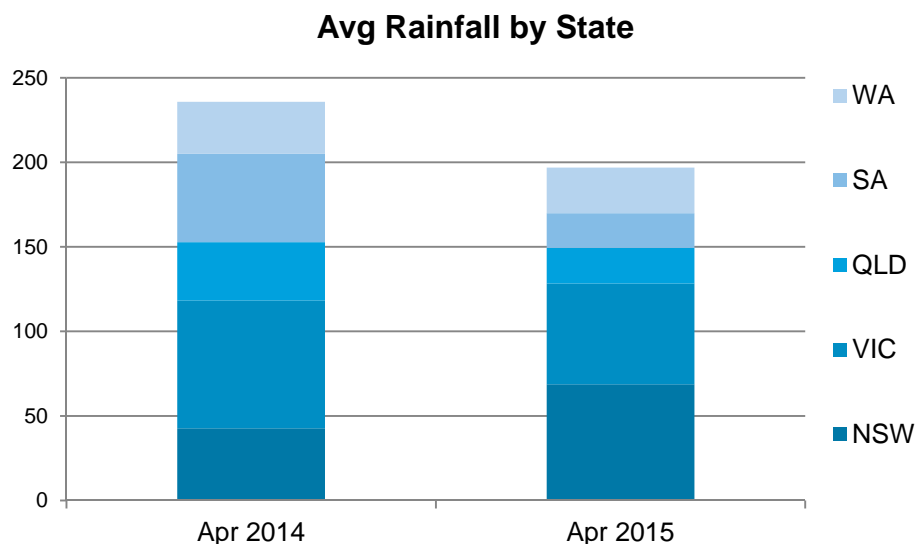


Rank Mar-15	Top 20 Properties	Rank Feb-15	Rank Jan-15	Rank YTD
1	Fisher Price	2	3	2
2	City	1	1	1
3	Star Wars	4	4	3
4	Disney Frozen	5	7	4
5	Thomas & Friends	9	13	7
6	Disney Princess	15	19	11
7	Friends	8	6	6
8	Shopkins	7	8	8
9	Barbie	10	11	10
10	Teenage Mutant Ninja Turtles	6	12	9
11	Minecraft	3	2	5
12	Peppa Pig	12	20	13
13	Transformers	16	16	14
14	Action	40	23	19
15	Little Tikes	11	21	17
16	Hot Wheels	14	17	15
17	Crayola	13	5	12
18	Monster High	17	14	18
19	Nerf	19	10	16
20	Disney Cars	30	31	23

Did weather affect Toys sales?

Were the sales in April affected by the rainfall experienced during the first weeks of the month?

The dramatic precipitation seen in some areas of the east coast is not conclusive enough to substantiate that weather might have a significant impact on April's performance. This is the conclusion after analysing the avg rainfall registered by the Bureau of Meteorology:



Now the question to be answer next month is if the weather effect made had an impact on 'Outdoor & Sports Toys' as the 'Building Sets' category is now the biggest in the toy industry. The May results will confirm this trend

Thank You



Industries

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Entertainment
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Trends
Technology
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Video Games

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