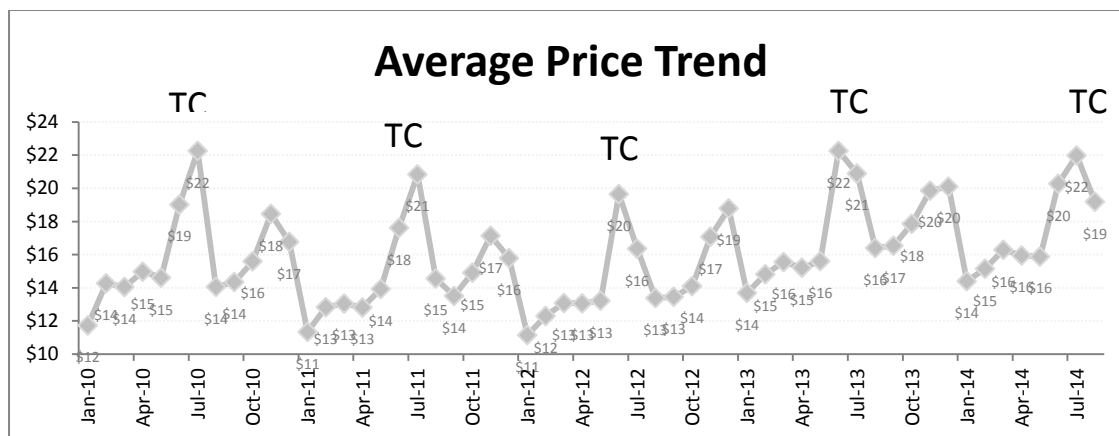


Excellent results in August; an unusual month that marked the end of the Toy Catalogue.

The Toy Catalogue went up to week 32, which means that two weeks of August were part of the toy sale, making it one of the longest in recent years. Those weeks made a difference and helped all sectors of the toy industry (retailers, distributors and consumers), to benefit from an extended period of discounts and promotions.

This year's strategy worked, and worked well. It was a bold move for some retailers to move away from the rest and introduce their Catalogue not in line with the others. In the end, shoppers made the most of it, units sold went up, dollar value went up and August sales were the highest in many years



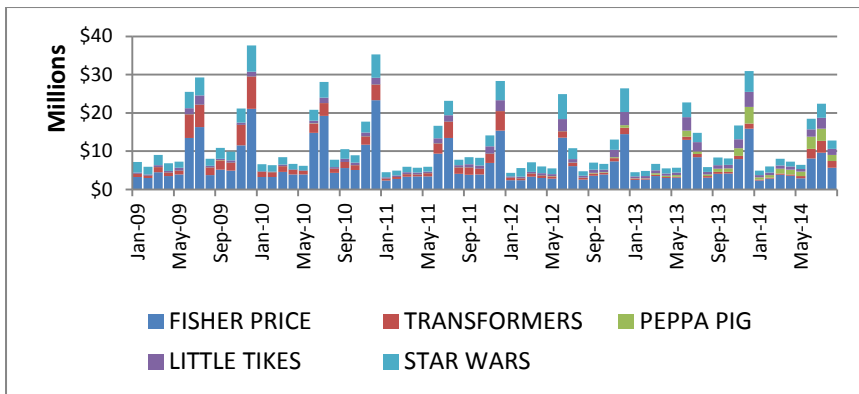
This 5 years analysis graph shows the average retail price month by month highlighting Toy Catalogue periods (TC). Each year retailers have applied different strategies causing mixed effects in the number of units sold v the dollar value. The interesting trend here is that the Average Price for Toys since 2012 started to move up as a whole. This indicates that the customer spending threshold has increased gradually over the last 24 months.

Rank Aug-14		Rank Jul-14	Rank Jun-14	Rank YTD
1	FISHER PRICE	1st	1st	1st
2	STAR WARS	2nd	5th	3rd
3	CITY	3rd	4th	2nd
4	TRANSFORMERS	5th	7th	13th
5	DISNEY PRINCESS	6th	3rd	4th
6	TEENAGE MUTANT NINJA TURTLES	8th	8th	7th
7	LITTLE TIKES	7th	11th	9th
8	PEPPA PIG	4th	2nd	6th
9	BARBIE	9th	6th	5th
10	THOMAS & FRIENDS	13th	14th	10th

In terms of the main value drivers for August results, the top 5 Properties were Transformers, Peppa Pig, Fisher Price, Little Tikes and Star Wars, however Fisher Price is in decline YTD.

Between those properties sales reached more than \$10m with Transformers and Peppa Pig showing triple digit growth when compared to August 2013. Peppa Pig however dropped 8th in the Rank

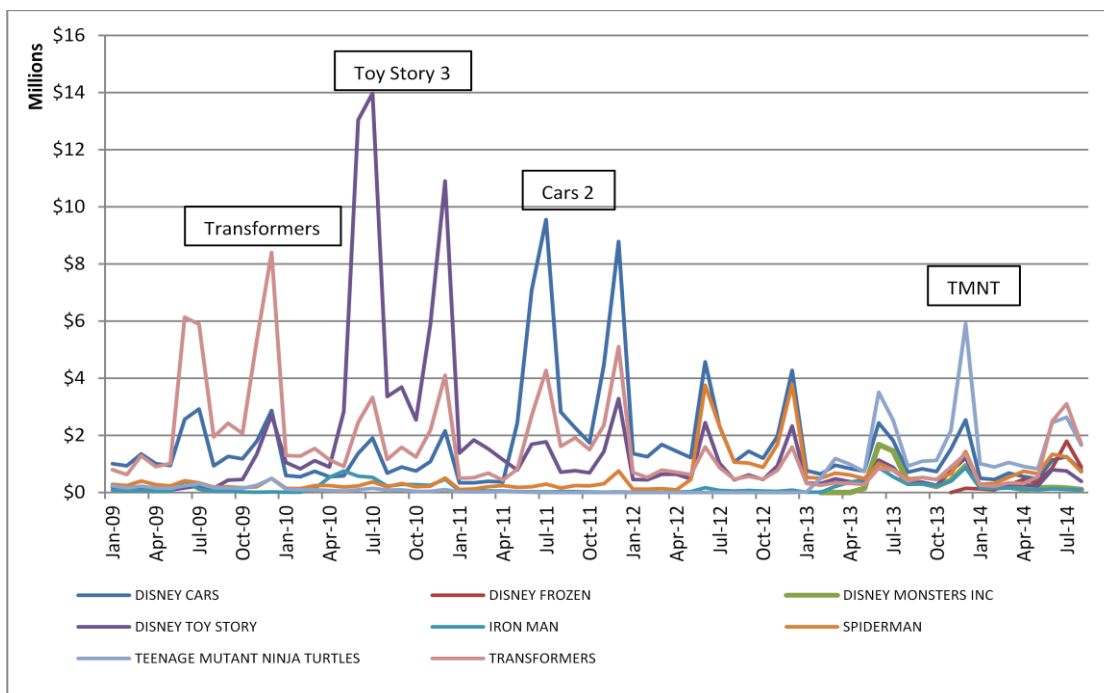
New in the top ten properties, or at least not seen in this top 10 since last April is Thomas & Friends. The results in August helped this property to escalate not only in the last month's ladder but also in the YTD climbing up to the 10th position as well



This Graph shows the performance of the Top 5 Properties for the past 6 years.

Movies effect in the toys industry with good results

Undoubtedly, the toy industry has very close ties to the film industry. An analysis made by NPD reveals the following in terms of sales. Historically the industry has seen one movie driving Toy sales in most years as per the graph below.



As the graph illustrates In 2009 Transformers released their second movie leading the sales on that year, in 2010 it was the turn for Toy Story 3 and in 2011 it was Cars 2 the clear leader. From 2012 onwards, the curve has flattened with contributions from a number of toys related to movies rather than being dominated by one movie release.

The sales share not only changed across multiple properties, but also across multiple categories such as 'Building Sets' with The Lego Movie, 'Dolls' with the movie Disney Frozen or Despicable Me in 'Plush'

For more information about the Australia Toy Insight report, please contact Miguel Velasquez at miguel.velasquez@npd.com

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