



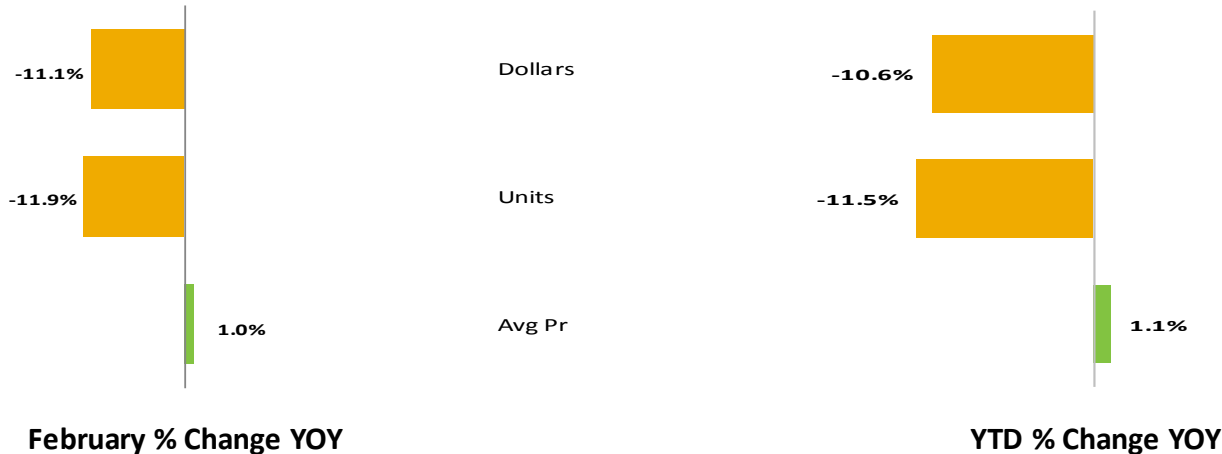
February 2019

# ATA Report

Australia Toy Association

# Industry Trends

The month of February recorded 11% decline vs. same month last year. Outdoor supercategory continued to be the fastest declining category – in fact the rate of decline accelerated in February compared to January. Dolls also declined faster than the market this month by 17%. Building Sets, Arts & Craft remained flat whilst Plush, Drawing & Craft supplies and Youth Electronics grew month on month. Excluding the Outdoor from the toys market read, month on month and year-to-date dollars declined by 8%.



# Monthly Trend

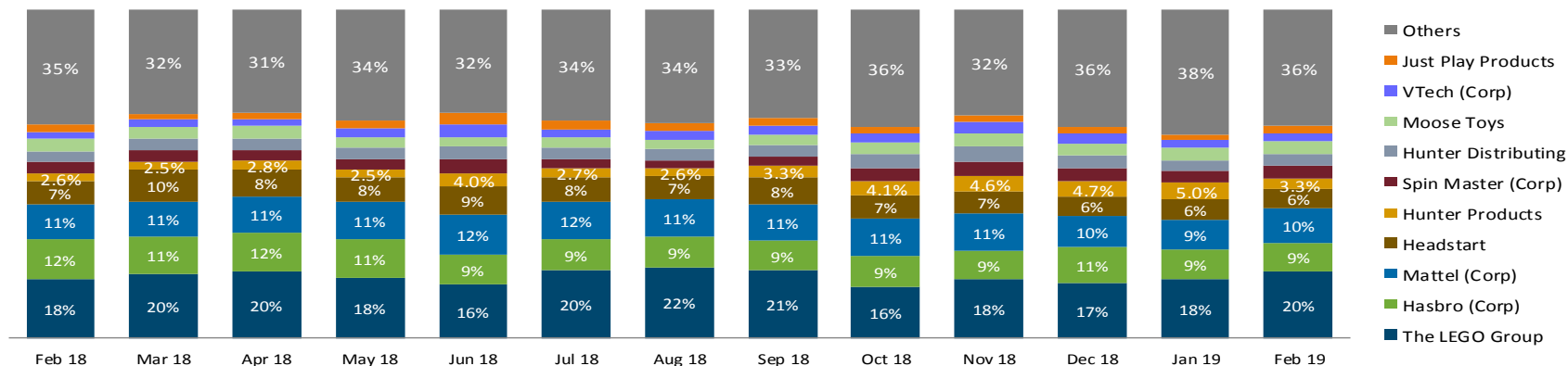
As the toy market continued to be challenged, Building sets continued to remain relatively unaffected. It accounted for \$1 out of \$5 spent on toys in Feb19. The average price of Building sets also recorded a 5% increase compared to the same month last year. Plush recorded the largest month on month dollar (+9%) and unit (+22%) growth.

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



# Corporate Manufacturers Trends

Similar to the previous month, Spin Master and Ikon Collectables experienced the largest dollar gains month on month. Turnaround for Moose Toys as their rate of decline started slow this year. Amongst the top 3 manufacturers, Lego experienced 1% growth vs. same month last year whilst Hasbro and Mattel declined by double digits. In Jan19, there were 3 L.O.L Surprise! items in the top 5 sellers, however, this month there was only 1 item.

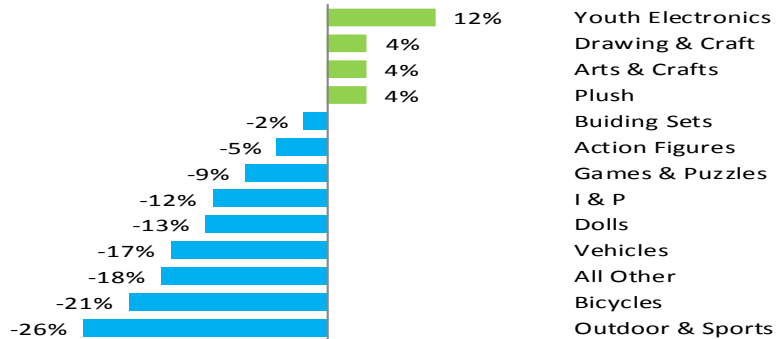


**Top Distributors rank by Market Share**

# Category Trends

Dolls decline rate accelerated with the month of Feb, mainly from Playset Doll Collectibles, driven across several properties such as Shopkins, Hatchimals, My Little Pony, Disney Princess and L.O.L Surprise!. Barbie experienced double digit growth within Dolls, mainly driven by Accessories. Two big properties within the Preschool category, PJ Masks and Paw Patrol also underperformed compared to the first 2 months of last year with both properties declining double digits. Some key products that grew the Plush category came from Scruff A Luvs, Pikmi Pops and Baby Shark.

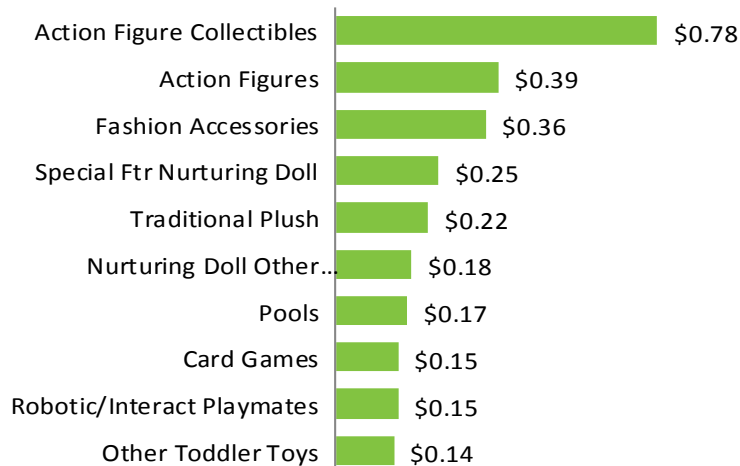
## Value Change YTD 2019



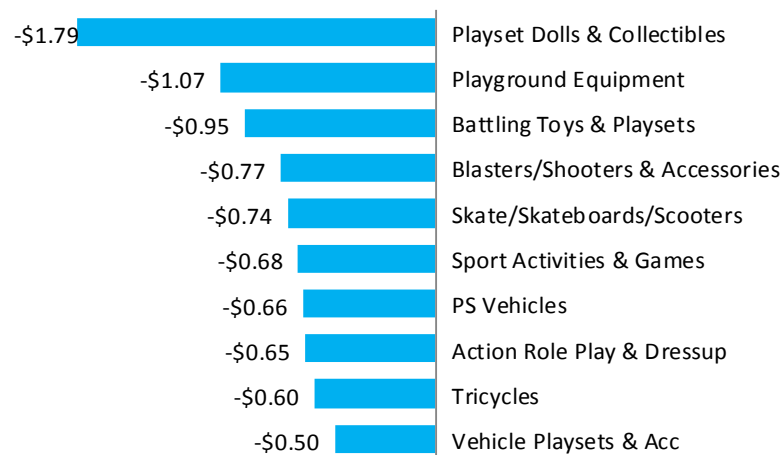
# Subclass Trends

Action Figure Collectibles subclass had the largest dollar gains driven by Treasure X and Fortnite. Nerf and X-Shot drove the decline of Blasters/Shooters in the current year to date and Laser X also started to decline in the month of Feb19.

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



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



# Property Trends

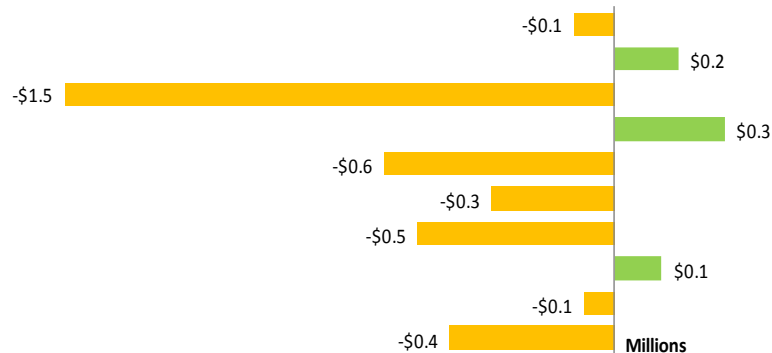
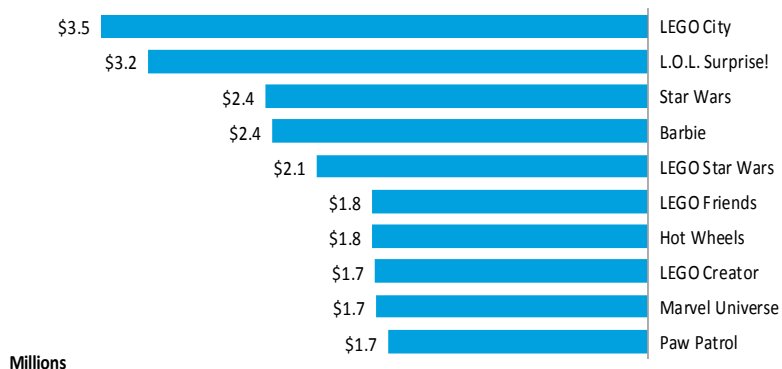
## Top 5 new properties Feb19 vs. Feb18

- #1 – Lego Harry Potter
- #2 – Fortnite
- #3 – Poopsie
- #4 – Pinkfong Baby Shark
- #5 – Treasure X

## Top 5 growth properties Feb19 vs. Feb18

- #1 – Harry Potter
- #2 – Jurassic Park/World
- #3 – How To Train Your Dragon
- #4 – Fortnite
- #5 – Funko Pop

## Top 10 properties YTD Feb19



## For more information

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