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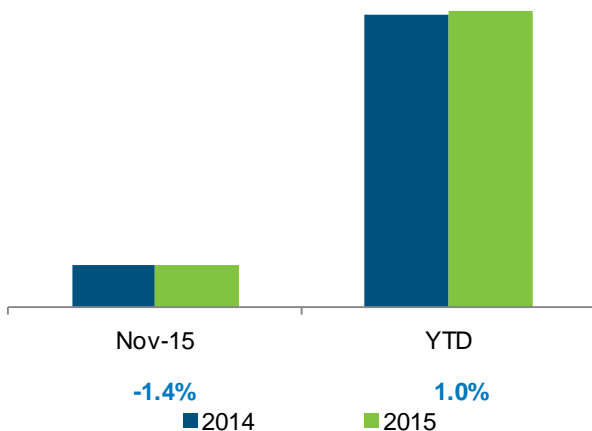
November 2015

Industry Trends

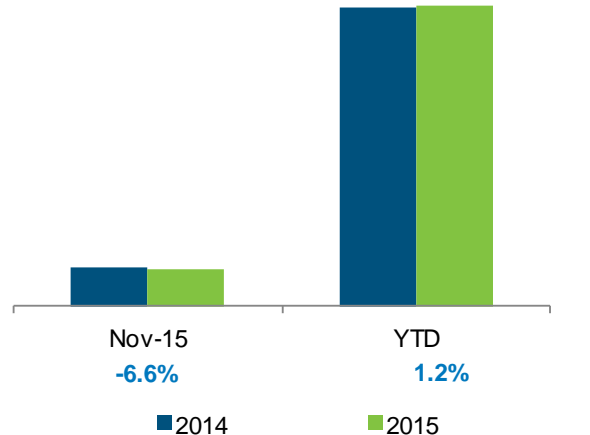
November 2015 saw a decline compared to last year, decreasing -1.4% in value and -6.6% in units. Despite this decline, the Australian toy market is still up in the YTD, increasing 1% in value and 1.2% in units.

We have also seen the Average Price increase in 2015 compared with the same time last year, growing from \$20.62 in November 2014 to \$21.77. This can be partly attributed to licensed toys, which typically achieve a higher average price, representing a greater proportion of the toys market sales, up from 32% in November 2014, to now 34%.

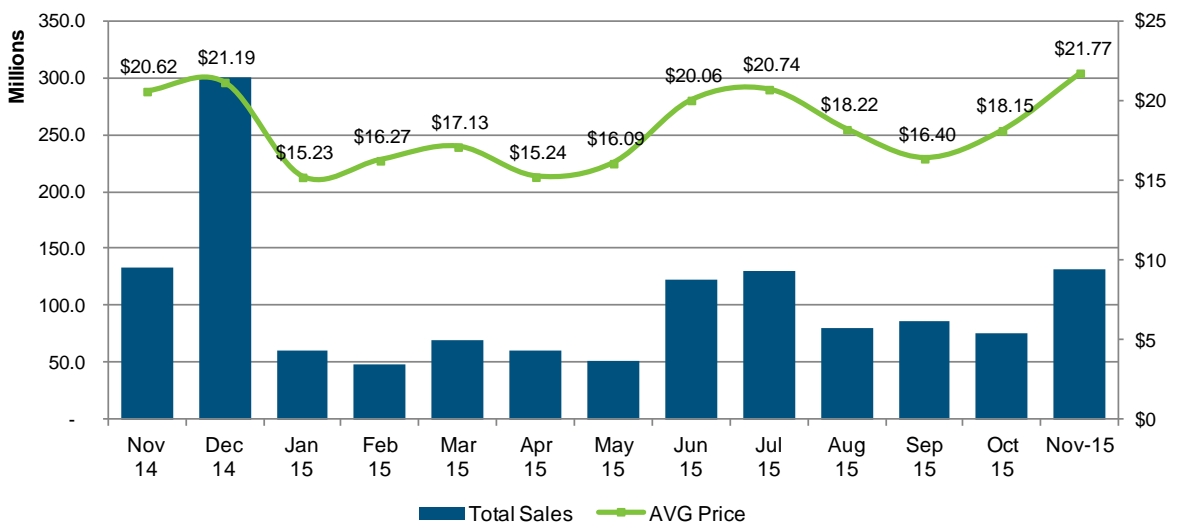
Value (\$m)



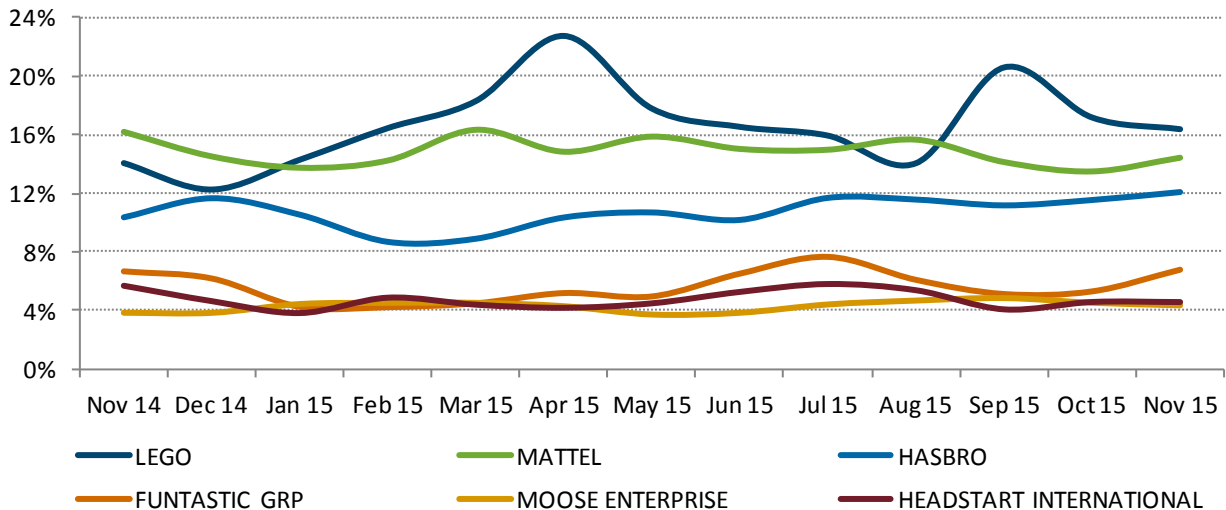
Units (m)



Monthly Value (\$m) and Average Price



Distributor Trends



Whilst Lego continues to be the leading distributor by market share, Mattel & Hasbro have both been closing the gap in the lead up to Christmas, with Lego coming down from a market share of 20.6% in September to now 16.4% in November. Funtastic has also had a successful last 3 months, with market share growing from 5% in September to now 6.8% in November. Headstart and Moose are battling it out for the 5th rank position, with Headstart just a fraction above Moose for the month of November.

YTD Rank

Rank	Top 10 Distributors YTD	Val Chg %
1	Lego	15.3%
2	Mattel	-4.8%
3	Hasbro	9.3%
4	Funtastic Grp	-11.2%
5	Headstart Int	-18.1%
6	Moose Enterprise	33.8%
7	Hunter Leisure	4.4%
8	Big Balloon	0.4%
9	Hunter Products	-31.6%
10	Modern Brands	-6.9%

Moose continues to experience the highest growth amongst the large distributors, recording 33.8% growth in the YTD, which can be attributed to the success of Shopkins & Little Live Pets.

Whilst Tomy is in decline in the YTD, the month of November proved to be a successful one, up 21.8% compared with last November. Miles From Tomorrowland as well as Disney Inside Out are driving this growth for Tomy.

Rank	Top 10 Distributors	Nov-14	Nov-15	Val Chg %
1	Lego	18,646,723	21,497,048	15.3%
2	Mattel	21,443,574	18,882,682	-11.9%
3	Hasbro	13,633,064	15,780,979	15.8%
4	Funtastic Grp	8,751,127	8,932,827	2.1%
5	Headstart Int	7,523,706	5,923,904	-21.3%
6	Moose Enterprise	5,057,865	5,711,502	12.9%
7	Hunter Leisure	4,622,061	4,193,280	-9.3%
8	Big Balloon	3,409,814	3,298,940	-3.3%
9	Modern Brands	2,261,218	2,636,319	16.6%
10	Hunter Products	4,454,948	2,423,933	-45.6%

Rank	Next 10 Distributors	Nov-14	Nov-15	Val Chg %
11	Tomy	1,305,992	1,590,623	21.8%
12	Crayola	1,270,564	1,570,535	23.6%
13	Britz N Pieces	1,533,081	1,282,920	-16.3%
14	Action Sports	1,241,282	1,161,734	-6.4%
15	Vtech	4,419	1,092,518	24620.8%
16	Croftminster	1,286,496	971,843	-24.5%
17	Kids li Australia	624,742	927,144	48.4%
18	Funrise Toys	588,581	873,217	48.4%
19	Swiftech	817,740	870,372	6.4%
20	Rubies Deerfield	2,050,475	831,927	-59.4%

Property Trends

Rank Nov-15	Top 20 Properties	Rank Oct-15	Rank Sep-15	Rank YTD
1	Star Wars	1	1	1
2	City	2	2	2
3	Fisher Price	6	5	4
4	Shopkins	3	3	6
5	Friends	8	7	7
6	Razor	11	21	20
7	Disney Frozen	5	6	3
8	Thomas & Friends	4	4	5
9	Barbie	10	10	10
10	Little Tikes	9	12	8
11	Nerf	7	9	12
12	Furreal	35	43	28
13	Paw Patrol	22	17	29
14	Disney Princess	13	15	9
15	Laugh & Learn	24	26	15
16	Hot Wheels	12	8	18
17	Monster High	15	28	22
18	Teenage Mutant Ninja Turtles	16	22	13
19	Despicable Me - Minions	23	19	11
20	Super Heroes	31	39	23

Star Wars continues to go from strength to strength, taking out the #1 rank in the YTD, as well as for the last 3 consecutive months. Star Wars will continue to drive growth, with Episode 7 scheduled for release on the 17th December.

City & Disney Frozen round out the Top 3 rank in the YTD, despite the fact that Disney Frozen has slipped to 7th in the month of November.

Funtastic's Razor has jumped the ranks significantly this month to 6th position compared with its YTD ranking of 20.

Category	Top Properties	Key Manufacturer	Nov-15 Val % Chg vs. YA
Action Figures & Acc	Star Wars	HASBRO	247.4%
	Teenage Mutant Ninja Turtles	HEADSTART INT	-19.8%
	Transformers	HASBRO	-46.3%
Arts & Crafts	Crayola	CRAYOLA	15.5%
	Faber Castell	FABER CASTELL	234.6%
	Play-Doh	HASBRO	-20.3%
Building Sets	Star Wars	LEGO	52.2%
	City	LEGO	-15.5%
	Friends	LEGO	-2.3%
Dolls	Shopkins	MOOSE ENTERPRISE	359.0%
	Barbie	MATTEL	-22.1%
	Monster High	MATTEL	-10.2%
Games / Puzzles	Monopoly	HASBRO	7.4%
	Pokemon	CROFTMINSTER	23.5%
	Monopoly	WINNING MOVES	266.6%
Infant/ Preschool Toys	Fisher Price	MATTEL	33.5%
	Thomas & Friends	MATTEL	11.0%
	Laugh & Learn	MATTEL	-6.2%
Outdoor & Sports Toys	Razor	FUNTASTIC GRP	60.3%
	Nerf	HASBRO	22.0%
	Little Tikes	HEADSTART INT	-28.2%
Plush	Furreal	HASBRO	84.1%
	Ty Beanie Babies	BIG BALLOON	15.5%
	Peppa Pig	BIG BALLOON	-57.5%
Vehicles	Hot Wheels	MATTEL	-6.8%
	Tonka	FUNRISE TOYS	55.7%
	Monster Jam	MATTEL	-2.6%
Youth Electronics	Little Live Pets	MOOSE ENTERPRISE	15.7%
	Zoomer	FUNTASTIC GRP	-2.4%
	Digibirds	GLOBAL DISCOVERY	-33.2%
All Other Toys	Schleich	MODERN BRANDS	88.6%
	Aqua Dragons	MODERN BRANDS	-0.9%
	Disney Frozen	HUNTER LEISURE	50.2%

Thank You



Industries

Automotive
Beauty
Consumer Electronics
Entertainment
Fashion
Food / Foodservice
Home
Luxury
Mobile
Office Supplies
Sports and Leisure
Trends
Technology
Toys
Video Games

Countries

Australia
Belgium
Brazil
Canada
China
France
Germany
India
Italy
Japan
Mexico
Netherlands
New Zealand
Poland
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South Korea
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Sweden
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