



ATA Report

October 2015

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Industry Trends

October 2015 had very similar results to October 2014: Value has experienced a small increase of +0.4% and units declined by -0.3%. The small growth in value contributed to the YTD performance which sits at +1.5% compared with last year, while units YTD is sitting at +2.3%.

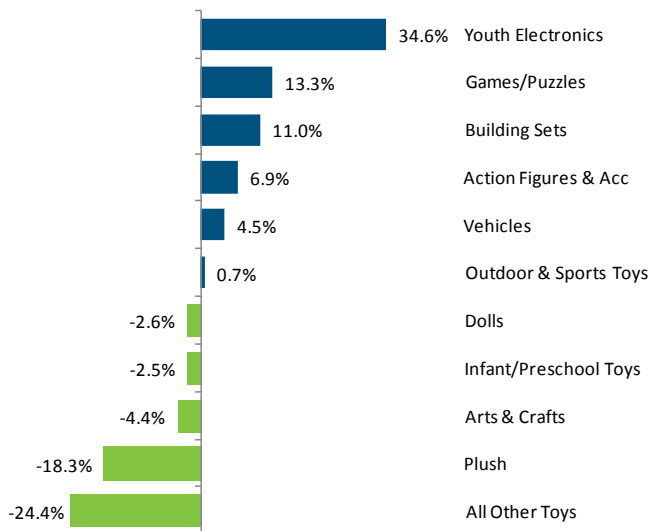
The expectation for the remaining two months is for units to have a slight decline, and for average retail price (ARP) to increase. Factors contributing to this trend are two-fold: Firstly, Star Wars is expected to continue to drive sales, and this is a property which performs in the higher price bands. Secondly, given the Australian toy industry relies heavily on the importation of toys, the devaluation of the Australian dollar is expected to place upward pressure on the ARP, a factor which could take a toll on consumption this coming Christmas.

AUD:USD (January 2014 – Current)



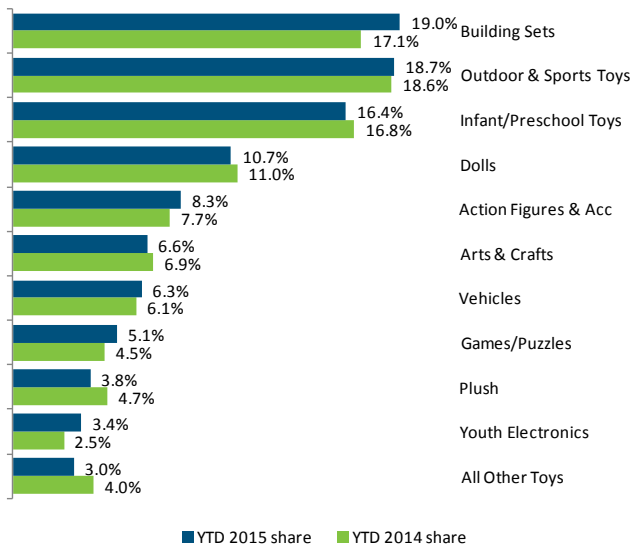
Category Trends

Value Change YTD



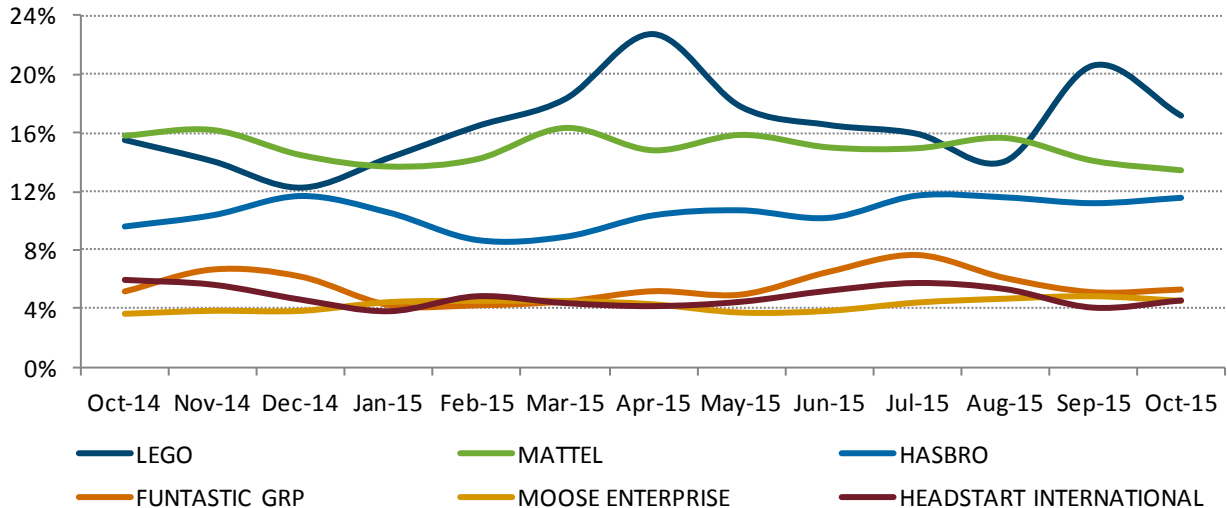
- 6 out of the 11 categories are currently growing compared to last year, while 5 are currently in decline. The Outdoor & Sports Toys category had a little boost in October with seasonal toys being released.
- Youth Electronics trend does not stop and YTD figures show a phenomenal performance with almost 35% growth.
- Games & Puzzles has also performed strongly, benefiting companies such as Hasbro and Croftminster (Ranking 1 and 2 respectively in this category).
- The third fastest growing category is Building Sets with the only difference from last year being that the driver is the licensed area.

Category Share YTD



- Action Figures continues with a strong performance on the back of movie releases this year and October had a phenomenal month thanks to Star Wars.
- Vehicles is another category that has seen the benefit of the licensing. In October this category a part from Hot Wheels and Monster Jam Star growth in this category is outstanding.

Distributor Trends



Lego's strong performance during September has dropped off in October and Hasbro continues to gain market share as the industry heads towards the biggest season of the year. Hasbro's recent releases have helped the company to close the gap with Mattel and this could be a significant achievement (the gap between the two in October was \$1.4m and on YTD basis is \$33m). The battle for the 4th position in the Australian toys market will get even more interesting than it has been already this year. Out of the 6 top distributors 5 are using Star Wars SKUs this coming Christmas.

Apart from Lego with its phenomenal performance and Moose with the Shopkins range, the performance from Crayola is also outstanding.

Seasonal toys are making a difference for companies such as Bestway with their pools range. This company managed to rank 11th in October and the overall position YTD is 25th.

October Rank

Rank	Top 10 Distributors
1	Lego
2	Mattel
3	Hasbro
4	Funtastic Grp
5	Moose Enterprise
6	Headstart International
7	Hunter Leisure
8	Big Balloon
9	Modern Brands
10	Hunter Products

Rank	Next 10 Distributors
11	Bestway Inflatables
12	Crayola
13	Tomy
14	Kids Ii Australia
15	Britz N Pieces
16	Faber Castell
17	Croftminster
18	Action Sports
19	Rubies Deerfield
20	Swiftech

YTD Rank

Rank	Top 10 Distributors YTD
1	Lego
2	Mattel
3	Hasbro
4	Funtastic Grp
5	Headstart International
6	Moose Enterprise
7	Hunter Leisure
8	Big Balloon
9	Hunter Products
10	Crayola

Property Trends

Rank	Top 20 Properties	Rank	Rank	Rank
Oct-15		Sep-15	Aug-15	YTD
1	Star Wars	1	2	1
2	City	2	3	2
3	Shopkins	3	7	6
4	Thomas & Friends	4	8	4
5	Disney Frozen	6	1	3
6	Fisher Price	5	5	5
7	Nerf	9	11	14
8	Friends	7	14	7
9	Little Tikes	12	4	8
10	Barbie	10	17	11
11	Razor	21	13	23
12	Hot Wheels	8	19	18
13	Disney Princess	15	16	9
14	Crayola	14	15	19
15	Monster High	28	25	22
16	Teenage Mutant Ninja Turtles	22	18	12
17	Avengers	11	9	15
18	Little Live Pets	20	22	26
19	Minecraft	16	24	13
20	Ninjago	13	37	29

Star Wars performance in September was exceptional, adding \$5.8m, and in October this property drove a further \$4.2m. The expectation for the two remaining months is equally high.

The Lego property City continues its excellent moment, adding \$22.2m YTD, which now places it above Disney Frozen YTD (sitting third and adding \$20.9m).

In the top 10 best performing properties YTD there are only 3 properties linked to the movies industry and 2 to TV shows.

Category	Top Properties	Key Manufacturer	Oct-15	
			Value Share	Val % Chg vs. YA
Action Figures & Acc	Star Wars	HASBRO	18.1%	182.3%
	Teenage Mutant Ninja Turtles	HEADSTART INTERNATIONAL	12.3%	-47.7%
	Transformers	HASBRO	11.2%	-17.6%
Arts & Crafts	Crayola	CRAYOLA	18.7%	39.2%
	Faber Castell	FABER CASTELL	12.4%	207.0%
	Play-Doh	HASBRO	6.6%	-19.5%
Building Sets	City	LEGO	15.9%	-1.1%
	Star Wars	LEGO	15.5%	43.9%
	Friends	LEGO	8.7%	-34.5%
Dolls	Shopkins	MOOSE ENTERPRISE	18.4%	139.5%
	Barbie	MATTEL	13.4%	-7.9%
	Monster High	MATTEL	9.1%	-14.0%
Games / Puzzles	Monopoly	HASBRO	11.1%	14.9%
	Pokemon	CROFTMINSTER	8.2%	-2.6%
	Twister	HASBRO	2.7%	7.2%
Infant/ Preschool Toys	Fisher Price	MATTEL	10.6%	20.7%
	Thomas & Friends	MATTEL	10.5%	5.6%
	Bright Starts	KIDS II AUSTRALIA	6.5%	69.7%
Outdoor & Sports Toys	Nerf	HASBRO	7.2%	29.7%
	Razor	FUNTASTIC GRP	6.0%	42.9%
	Little Tikes	HEADSTART INTERNATIONAL	3.9%	-11.7%
Plush	Furreal	HASBRO	23.4%	19.1%
	Ty Beanie Babies	BIG BALLOON	10.4%	-0.5%
	Peppa Pig	BIG BALLOON	6.1%	-53.2%
Vehicles	Hot Wheels	MATTEL	19.3%	-1.3%
	Monster Jam	MATTEL	10.9%	46.5%
	Disney Cars	MATTEL	5.0%	-14.3%
Youth Electronics	Little Live Pets	MOOSE ENTERPRISE	36.1%	142.7%
	Zoomer	FUNTASTIC GRP	12.0%	815.4%
	Furby	HASBRO	11.2%	-1.0%
All Other Toys	Yummy Nummies	BIG BALLOON	6.0%	NEW
	Disney All Other	BIG BALLOON	4.1%	284.0%
	Schleich	MODERN BRANDS	4.0%	47.6%

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
Russia
South Korea
Spain
Sweden
Turkey
United Kingdom
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