Apr 2023 **ATA Report** Australia Toy Association

Industry Trends

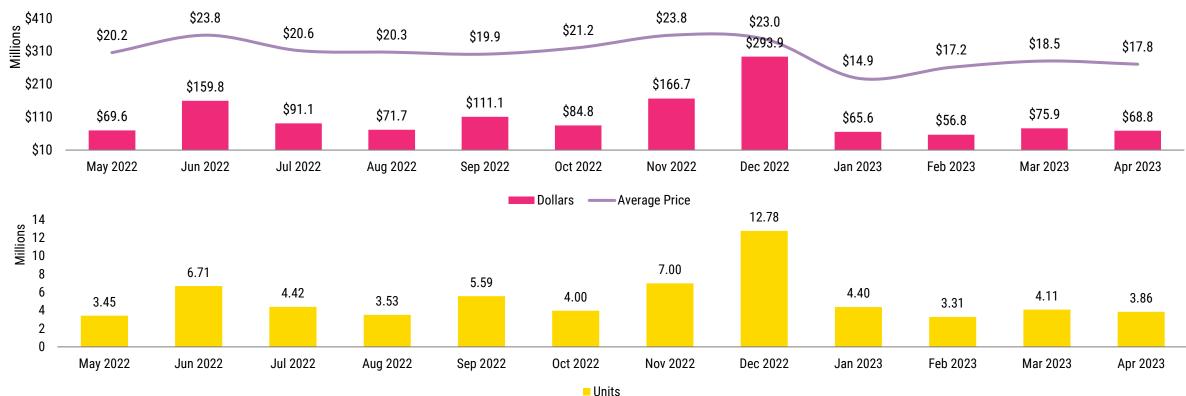
April 2023 experienced a -16% decline vs. 2022 for dollars. Units decline -9% and average price decline -7% in the latest month (\$17.80). Games/Puzzles (+1%) was the only supercategory that grew this month, meanwhile Building Sets (-19%), Dolls (-27%) and Infant/Toddler/Preschool Toys (-15%) were the 3 largest decliners. For YTD Apr, total dollars declined by -8% vs. 2022 as Building Sets dropped -12% (-\$7M) and was the largest YTD decliner followed by Dolls -19% (-\$6.4M). Similar trend for Global YTD Apr which had a decline of -6% for dollars.





Monthly Trend

For April 2023, Building Sets continue to be the largest dollar made category, but the largest dollar decline of -19%. The next following largest dollar made supercategories were Infant/Toddler Preschool Toys, Dolls, Games/Puzzles, Outdoor & Sports Toys and Vehicles. Average price was \$19.20 in 2022 and declined to \$17.80 for 2023 driven from both licensed and unlicensed toys.



Monthly Value (\$M), Average Price (\$) and Units (M)

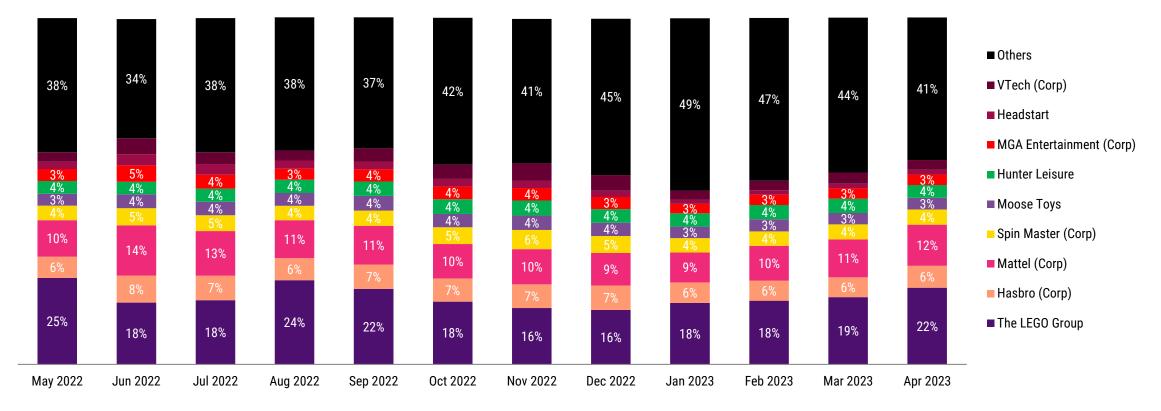


Toys Australia YTD Apr 2023

Circana, Inc. and Circana Group, L.P. | Proprietary and confidential 3

Corporate Manufacturers Trends

For April 2023, LEGO is the leading dollar manufacturer but dropped -20% in dollar and dropped -1 share points. Banter Toys has the largest growth of 24% with +2 share points increase driven by Pokémon and Squishmallows. Pokémon continues to be the leading dollar property for 4 months in a row, followed by Hot Wheels and Star Wars. As for YTD Apr 2023, the largest dollar gained properties continues to be Pokémon, Squishmallows and Hot Wheels. The top 3 leading manufacturer dollar gainers for YTD Apr are Banter Toys (+36%), followed by Zuru (+10%) and Newell Brands (+41%).



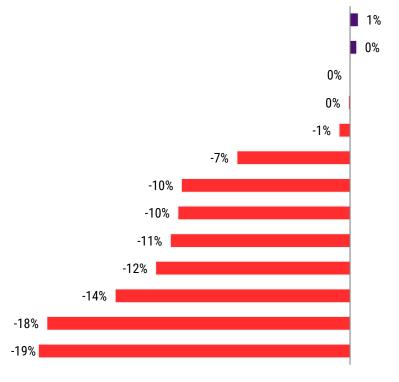


Category Trends

For YTD Apr 2023, only 1 supercategory grew which was Outdoor & Sports Toys, growth of +1% (+\$153K) mainly driven from Wahu, Bunch O Balloons and X-Shot. Games/Puzzles was flat in percentage but in absolute dollar, saw a +\$95K gain which was mainly driven by Pokémon and Nintendo. Building Sets had the largest drop of -12% (\$-7M) contributed from LEGO Technic, Harry Potter and LEGO Ideas.

% Value Change YTD

rcana



Games/Puzzles
Drawing & Craft Supplies
Plush
Vehicles
Youth Electronics
Explorative & Other Toys
Infant/Toddler/Preschool Toys
Arts & Crafts
Building Sets
Action Figures & Acc
Bicycles & Accessories
Dolls

Outdoor & Sports Toys





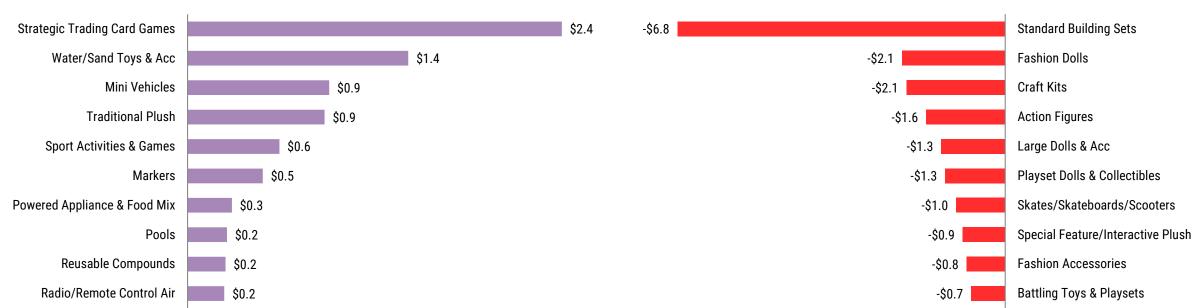




Subclass Trends

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

Games/Puzzles was the only supercategory which grew this month, Strategic Trading Card Games grew +36% (+\$717K) driven from Pokémon. In outdoor & Sports Toys, Water/Sand Toys grew +10% (+\$48K), from Wahu. Despite Vehicles dropping -4% this month, Mini Vehicles is the 2nd top subclass gainer, growing +20% (+\$349K) strongly driven from Hot Wheels. Standard Building Sets continues to drop dramatically this month -19% (-\$3.3M) from LEGO Technic and LEGO Harry Potter.



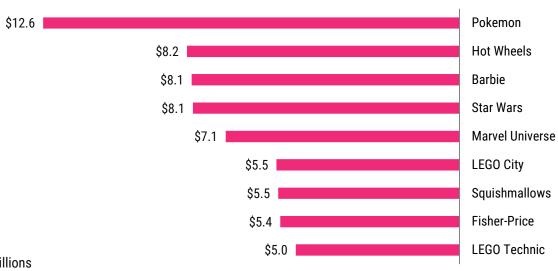
Top Declining Subclass by Value-added YTD (\$MM)



Property Trends

Top 5 new properties Apr'23 vs. Apr'22

- #1 Indiana Jones
- #2 Avatar The Movie
- #3 NASCAR
- #4 LEGO Disney Moana/Vaiana/Oceania
- #5 Aphmau



Top 10 Properties YTD

Top 5 dollar gaining properties Apr'23 vs. Apr'22

- #1 Pokémon
- #2 Nintendo
- #3 Hot Wheels
- #4 LEGO Speed Champions
- #5 Gabby's Dollhouse



\$ Value Change vs YAG

Millions



For more information

Contact Circana, Inc. and Circana Group, L.P. at 866-444-1411 or email <u>contactnpd@npd.com</u>, or your account representative below.

Amelia Eng	Jim Thach
Senior Account Manager	Account Manager
<u>Amelia.Eng@circana.com</u>	<u>Jim.Thach@circana.com</u>
+61 418 500 547	+61 428 001 154

About Contact Circana, Inc. and Circana Group, L.P.

The Circana, Inc. provides market information and business solutions that drive better decision-making and better results. The world's leading brands rely on us to help them get the right products in the right places for the right people. Practice areas include apparel, appliances, automotive, beauty, consumer electronics, diamonds, e-commerce, entertainment, fashion accessories, food consumption, foodservice, footwear, home, mobile, office supplies, retail, sports, technology, toys, video games, and watches / jewelry.

For more information visit us at <u>circana.com</u>

Follow us on Twitter: @Circana

