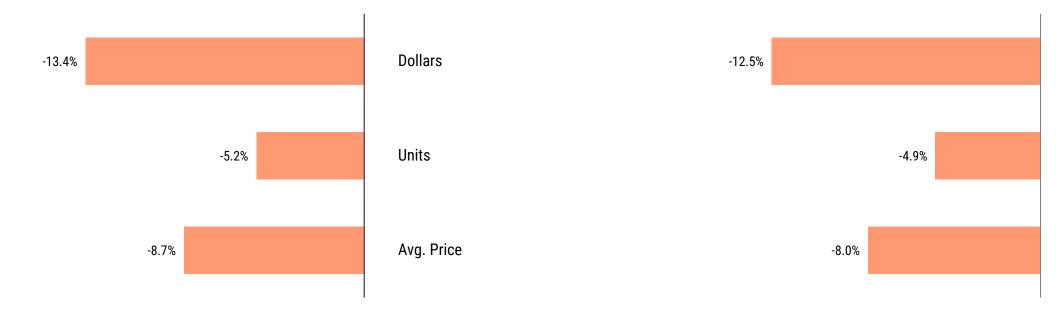Jul 2023

ATA Report

Australia Toy Association

Industry Trends

July 2023 experience a -13% decline vs. 2022 for dollars, units declined -5% and average price declined -9% ($18.84). No supercategoy grew this month, Plush category was flat. The 3 largest decliners were Infant/Toddler/Preschool Toys (-25%), Outdoor & Sports Toys (-24%) and Dolls (-15%). For YTD July, total dollars declined -13% (Global declined -7%) and the largest category drop continues to be Building Sets (-15%).
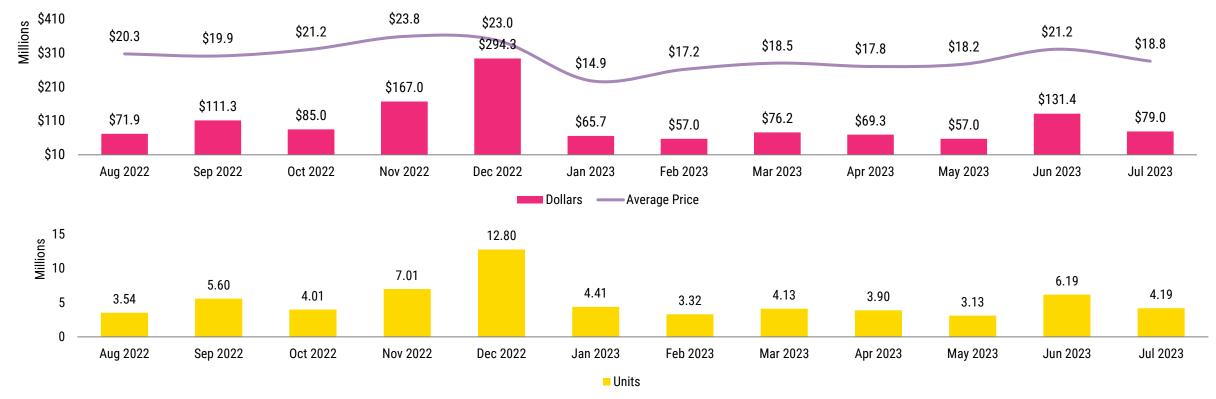

July % Change YOY

Dollars: -13.4%
Units: -5.2%
Avg. Price: -8.7%

YTD % Change YOY

Dollars: -12.5%
Units: -4.9%
Avg. Price: -8.0%

Monthly Trend

For July 2023, Building Sets continues as the largest dollar made category, but was 5th largest decliner of -7%. The next largest dollar made categories are Dolls, Infant/Toddler/Preschool Toys, Vehicles, Outdoor & Sports Toys and Plush. Average price $20.63 and declined to $18.84 for July 2023, driven from both licensed and non-licensed toys.
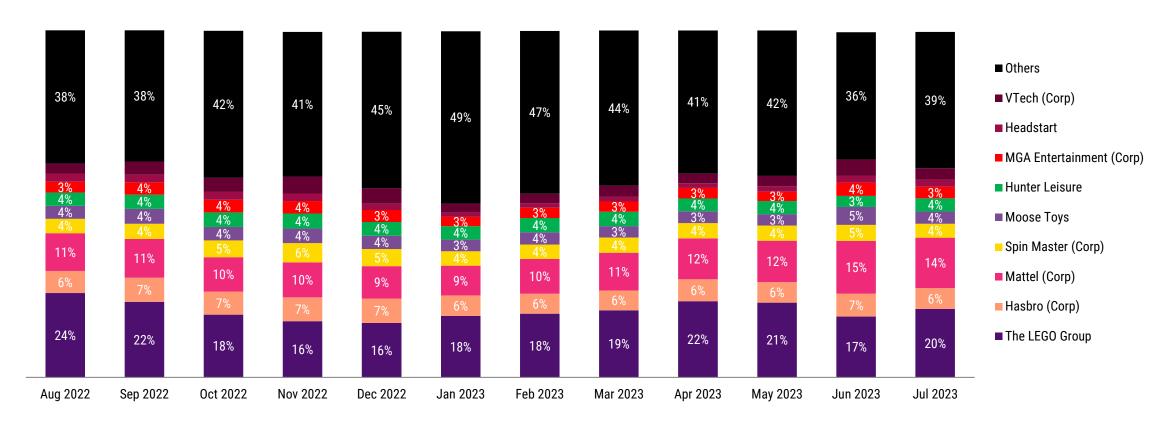
Monthly Value ($M), Average Price ($) and Units (M)

Chart: Monthly Value ($M) and Average Price ($)

Month	Dollars ($M)	Average Price ($)
Aug 2022	$71.9	$20.3
Sep 2022	$111.3	$19.9
Oct 2022	$85.0	$21.2
Nov 2022	$167.0	$23.8
Dec 2022	$294.3	$23.0
Jan 2023	$65.7	$14.9
Feb 2023	$57.0	$17.2
Mar 2023	$76.2	$18.5
Apr 2023	$69.3	$17.8
May 2023	$57.0	$18.2
Jun 2023	$131.4	$21.2
Jul 2023	$79.0	$18.8

Legend: Dollars — Average Price

Chart: Units (M)

Month	Units (M)
Aug 2022	3.54
Sep 2022	5.60
Oct 2022	4.01
Nov 2022	7.01
Dec 2022	12.80
Jan 2023	4.41
Feb 2023	3.32
Mar 2023	4.13
Apr 2023	3.90
May 2023	3.13
Jun 2023	6.19
Jul 2023	4.19

Legend: Units

Toys Australia YTD Jul 2023
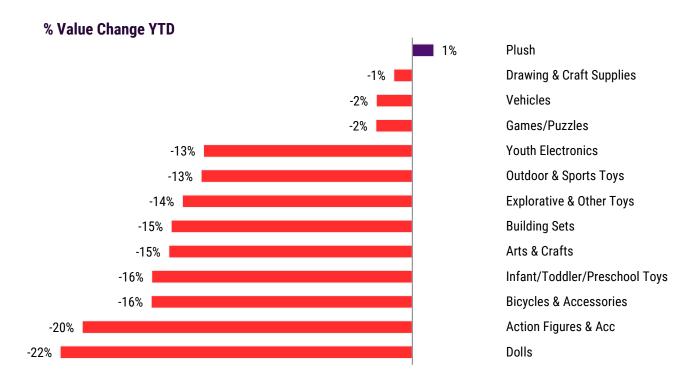
Corporate Manufacturers Trends

For July 2023, LEGO is the leading dollar manufacturer however Zuru had the largest dollar growth which grew 1 share point. Barbie is the leading dollar property, followed by Hot Wheels and Pokémon. As for YTD July 2023, the largest dollar gaining properties Pokémon, followed by Squishmallows and Hot Wheels. The top 3 leading manufacturer dollar gaining for YTD Jul are Banter Toys, Zuru and Newell Brands.

Legend:
- Others
- VTech (Corp)
- Headstart
- MGA Entertainment (Corp)
- Hunter Leisure
- Moose Toys
- Spin Master (Corp)
- Mattel (Corp)
- Hasbro (Corp)
- The LEGO Group

Month	Others	MGA Entertainment (Corp)	Hunter Leisure	Moose Toys	Spin Master (Corp)	Mattel (Corp)	Hasbro (Corp)	The LEGO Group
Aug 2022	38%	3%	4%	4%	4%	11%	6%	24%
Sep 2022	38%	4%	4%	4%	4%	11%	7%	22%
Oct 2022	42%	4%	4%	4%	5%	10%	7%	18%
Nov 2022	41%	4%	4%	4%	6%	10%	7%	16%
Dec 2022	45%	3%	4%	4%	5%	9%	7%	16%
Jan 2023	49%	3%	4%	3%	4%	9%	6%	18%
Feb 2023	47%	3%	4%	4%	4%	10%	6%	18%
Mar 2023	44%	3%	4%	3%	4%	11%	6%	19%
Apr 2023	41%	3%	4%	3%	4%	12%	6%	22%
May 2023	42%	3%	4%	3%	4%	12%	6%	21%
Jun 2023	36%	4%	3%	5%	5%	15%	7%	17%
Jul 2023	39%	3%	4%	4%	4%	14%	6%	20%

Category Trends

For YTD July 2023, Only 1 category grew which was Plush, growth of +1% (+$590K) driven Squishmallows, Pokémon and Rainbocorns. Games/Puzzles declined -2% but Strategic Trading Card Games grew +26% from Pokémon. Vehicles declined -2% however Mini Vehicles (+19%) was the #2 gaining subclass for YTD driven from Hot Wheels. Building Sets dropped -15% (-$18M) driven from LEGO technic, Jurassic Park/World and Harry Potter/Fantastic Beast for YTD.
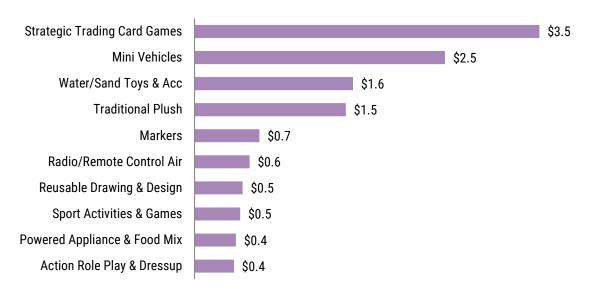
% Value Change YTD

Category	% Value Change YTD
Plush	1%
Drawing & Craft Supplies	-1%
Vehicles	-2%
Games/Puzzles	-2%
Youth Electronics	-13%
Outdoor & Sports Toys	-13%
Explorative & Other Toys	-14%
Building Sets	-15%
Arts & Crafts	-15%
Infant/Toddler/Preschool Toys	-16%
Bicycles & Accessories	-16%
Action Figures & Acc	-20%
Dolls	-22%

Toys Australia YTD Jul 2023

Subclass Trends

No category grew this month, however Plush remained flat where Traditional Plush grew +7% (+$315K) driven from Squishmallows and Rainbocorns. Vehicles had a -2% decline but Mini Vehicles (+22%) was the #1 top subclass gainer adding $490K. Standard Building Sets continues to drop this month -6% (-$917K) from Jurassic Park/World, LEGO Technic and LEGO Friends.

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

Subclass	Value
Strategic Trading Card Games	$3.5
Mini Vehicles	$2.5
Water/Sand Toys & Acc	$1.6
Traditional Plush	$1.5
Markers	$0.7
Radio/Remote Control Air	$0.6
Reusable Drawing & Design	$0.5
Sport Activities & Games	$0.5
Powered Appliance & Food Mix	$0.4
Action Role Play & Dressup	$0.4

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

Value	Subclass
-$17.2	Standard Building Sets
-$5.6	Action Figures
-$4.2	Craft Kits
-$3.9	Fashion Dolls
-$3.4	Early Electronic Learning
-$3.1	Large Dolls & Acc
-$3.0	Skates/Skateboards/Scooters
-$2.8	Playset Dolls & Collectibles
-$2.7	Playground Equipment
-$2.3	PS Figure/Playsets & Acc

Property Trends

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

#1 – Avatar The Movie
#2 – Peugeot
#3 – Aphmau
#4 – Indiana Jones
#5 – Puppy/Kitty Surprise/Bunny Surprise

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

#1 – Barbie
#2 – Squishmallows
#3 – Ninja Turtles (TMNT)
#4 – LEGO Speed Champions
#5 – Nintendo

Top 10 Properties YTD

Property	Value
Pokemon	$22.9
Barbie	$22.1
Hot Wheels	$19.5
Star Wars	$16.3
Marvel Universe	$14.1
Fisher-Price	$11.7
LEGO City	$10.7
Squishmallows	$10.3
LEGO Technic	$10.0

Millions

$ Value Change vs YAG

Property	Value
Pokemon	$4.9
Barbie	-$2.1
Hot Wheels	$3.3
Star Wars	-$2.7
Marvel Universe	-$0.9
Fisher-Price	-$3.7
LEGO City	-$1.1
Squishmallows	$3.7
LEGO Technic	-$6.0

Millions

For more information

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