

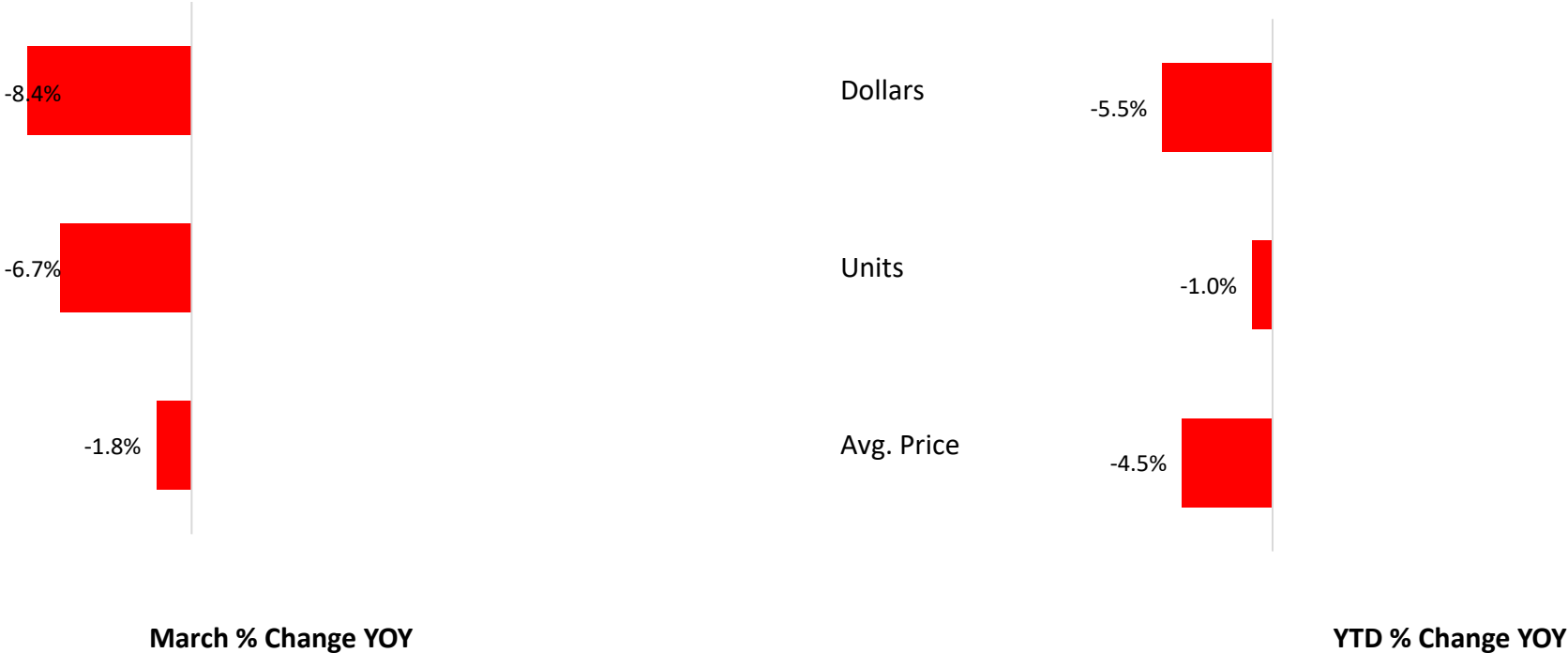
Mar 2023

# ATA Report

Australia Toy Association

# Industry Trends

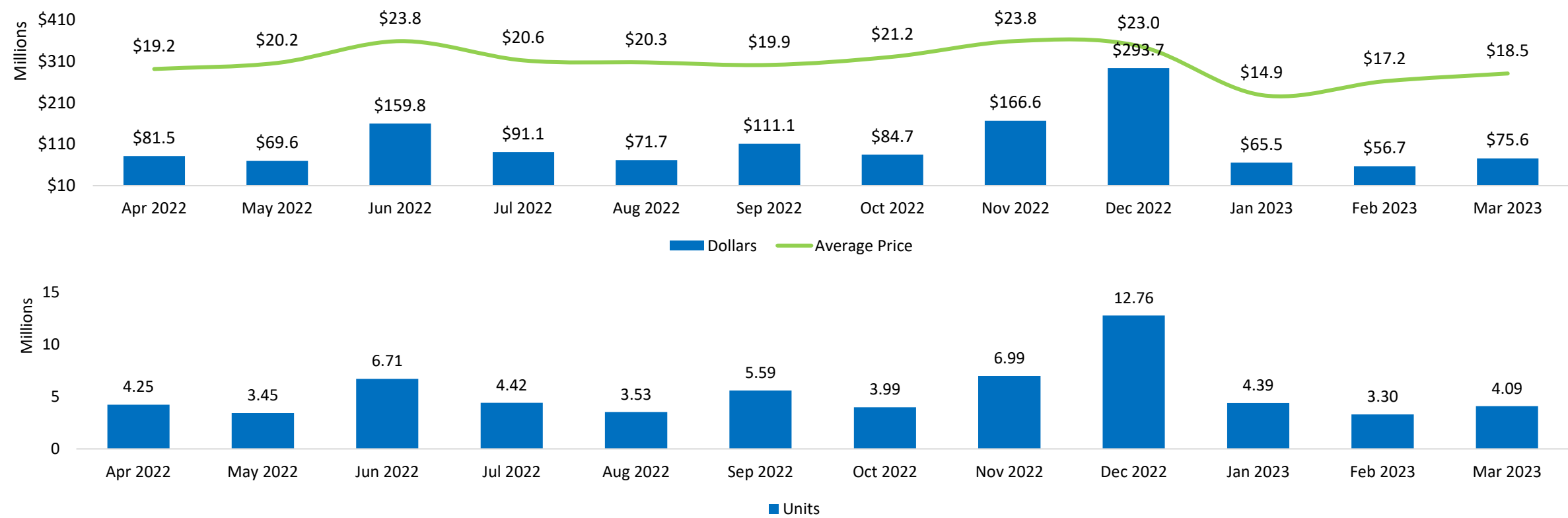
March 2023 experienced -8% decline vs 2022. Units decline -7% and average price decline -2% in the latest month (\$18.47). Plush (+10%) and Youth Electronics (+8%) were the 2 supercategories gainers for the month, meanwhile Building Sets (-14%), Dolls (-19%) and Infant/Toddler/Preschool Toys (-11%) were the 3 biggest decliners for the month. For YTD Mar, total dollars declined by -5% VS. 2022 as dolls with a -16% (-\$3.8M) continues to be the largest decliner. Similarly for YTD Global had a decline of -3% for dollars.



# Monthly Trend

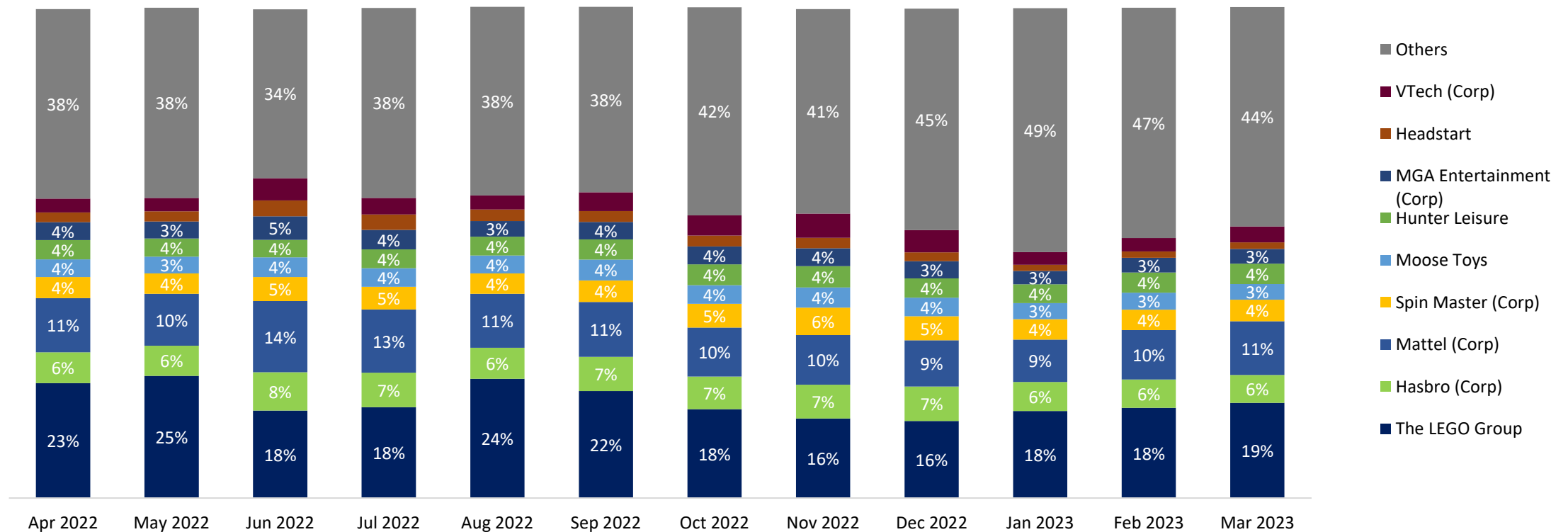
For March 2023, Building Sets was the largest dollar made supercategory but the largest dollar decline of -14%. The next largest dollar made supercategories were Infant/Toddler Preschool Toys, Dolls, Outdoor & Sports Toys, Plush and Vehicles. Average price was \$18.81 in 2022 and declined to \$18.47 for 2023 driven from licensed toys. Meanwhile unlicensed toys had a +2% increase for the month.

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



# Corporate Manufacturers Trends

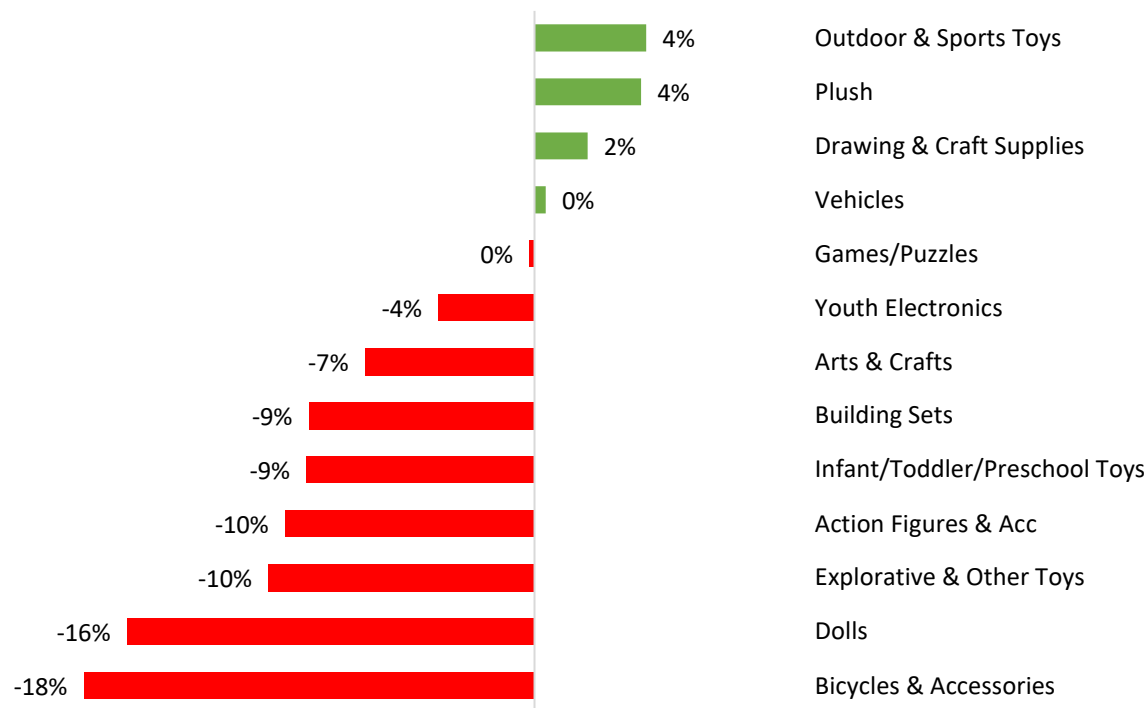
For March 2023, LEGO is the leading dollar manufacturer, however dropped -15% in dollar and dropped -2 share points. Banter Toys has the largest growth of +43% with +3 share points increase driven by Squishmallows. Pokémon continues to be the leading dollar property for 3 months in a row, followed by Hot Wheels and Barbie. For the YTD Mar 2023, the largest dollar gained properties continues to be Pokémon, Squishmallows and Hot Wheels. The top 3 leading manufacturer dollar gainers for YTD are Banter Toys (+40%), followed by Mattel (+6%) and Faber-Castell (+20%).



# Category Trends

For YTD Mar, 3 supercategories grew, Outdoor & Sports Toys had the largest growth of +4% (+\$1M) mainly driven from Wahu and Bunch O Balloons. Plush had a positive month, grew +4% (+\$636K) for the YTD, driven from Squishmallows and Pokémon. Drawing & Crafts grew +2% (+\$183K) mostly from Faber – Castell. Dolls had the largest drop of -16% (-\$3.8M) contributed from L.O.L Surprise!, Barbie and Our Generation.

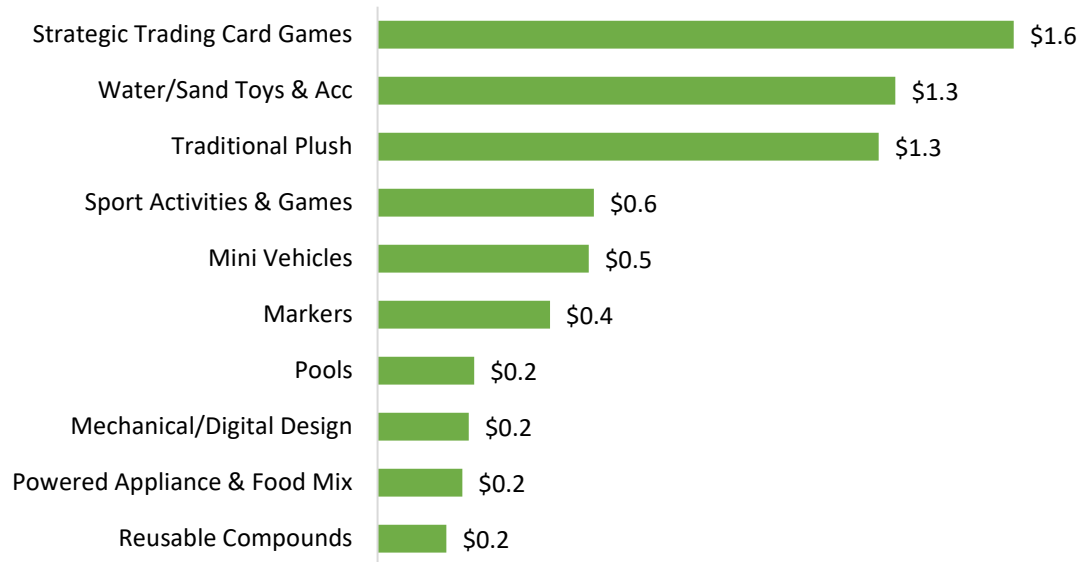
% Value Change YTD



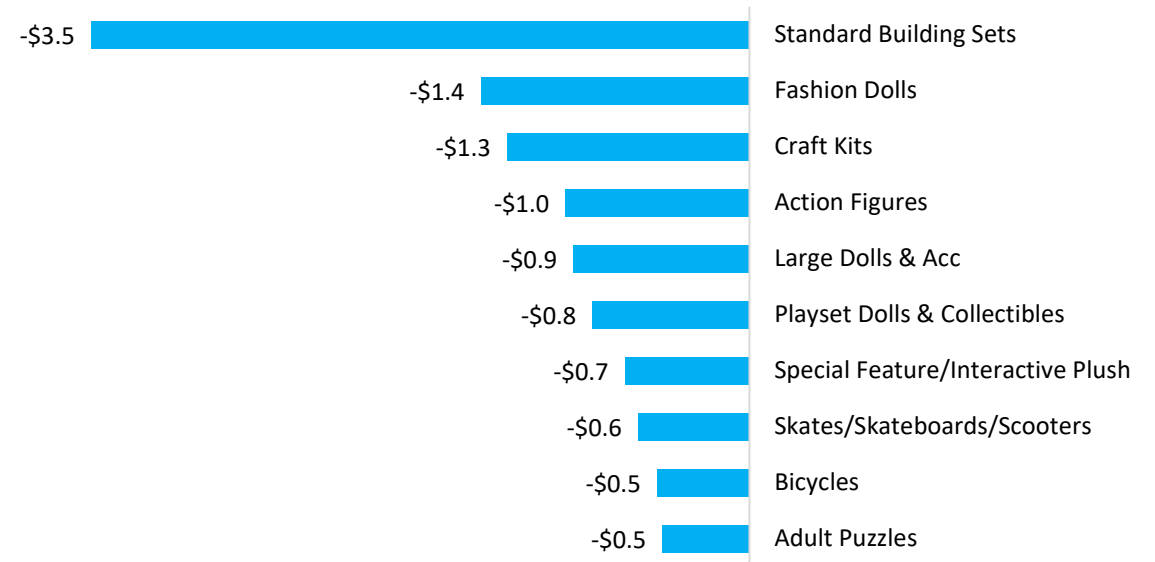
# Subclass Trends

For Plush, Traditional Plush dominated this month which grew +18% (+\$830K) driven from Squishmallows, Pokémon and Rainbocorns. In Outdoor & Sports Toys, Water/sand Toys & Acc grew +41% (+\$324K) from Wahu, Bluey and Bunch O Balloons. For Drawing & Crafts Supplies, Markers grew +12% (+\$42K) driven mostly from Faber-Castell Manufacturer. Despite Games/Puzzles declining this month, Strategic Trading Card Games is the 2<sup>nd</sup> top subclass gainer, growing +25% (+\$537K) strongly driven from Pokémon. Standard Building Sets continues to drop dramatically this month -15% (-\$2.4M) from LEGO Technic and LEGO Harry Potter.

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



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



# Property Trends

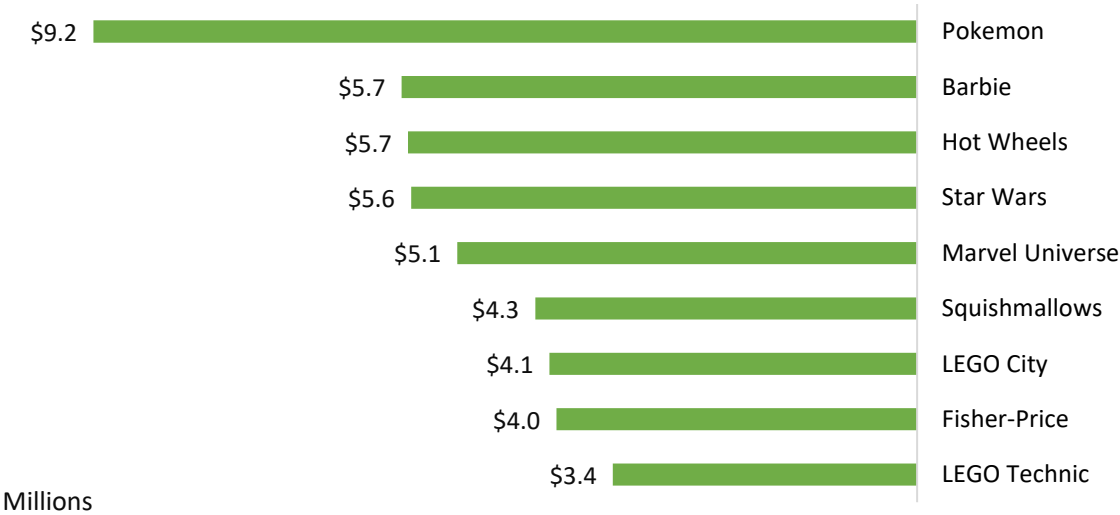
## Top 5 new properties Mar'23 vs. Mar'22

- #1 – Avatar The Movie
- #2 – Sanrio Characters
- #3 – Tapple
- #4 – Octonauts
- #5 – Indiana Jones

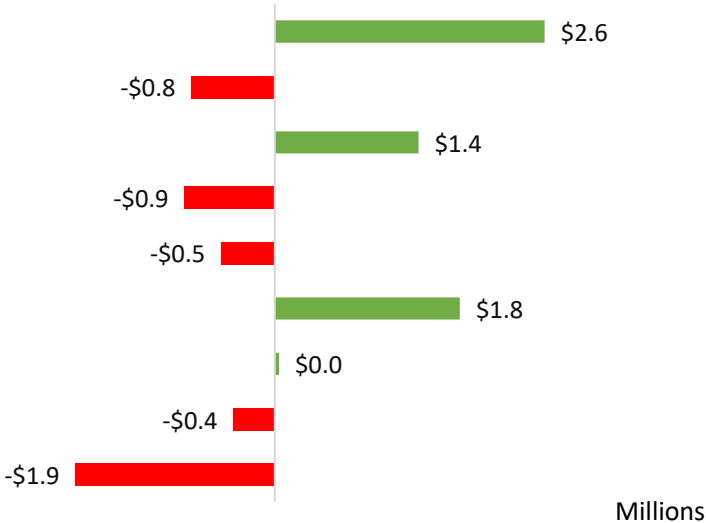
## Top 5 dollar gaining properties Mar'23 vs. Mar'22

- #1 – Pokémon
- #2 – Squishmallows
- #3 – Hot Wheels
- #4 – Gabby’s Dollhouse
- #5 – LEGO Speed Champions

### Top 10 Properties YTD



### \$ Value Change vs YAG



## For more information

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