

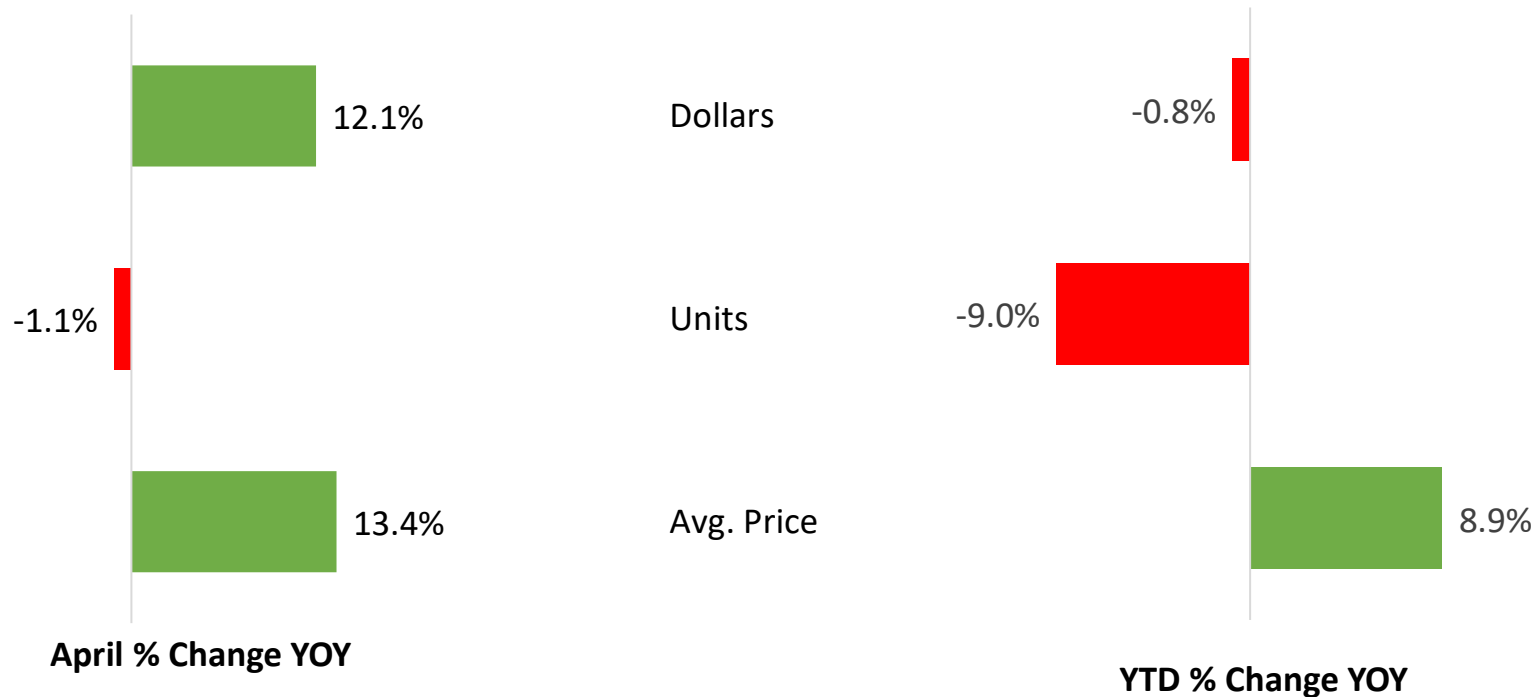
Apr 2022

ATA Report

Australia Toy Association

Industry Trends

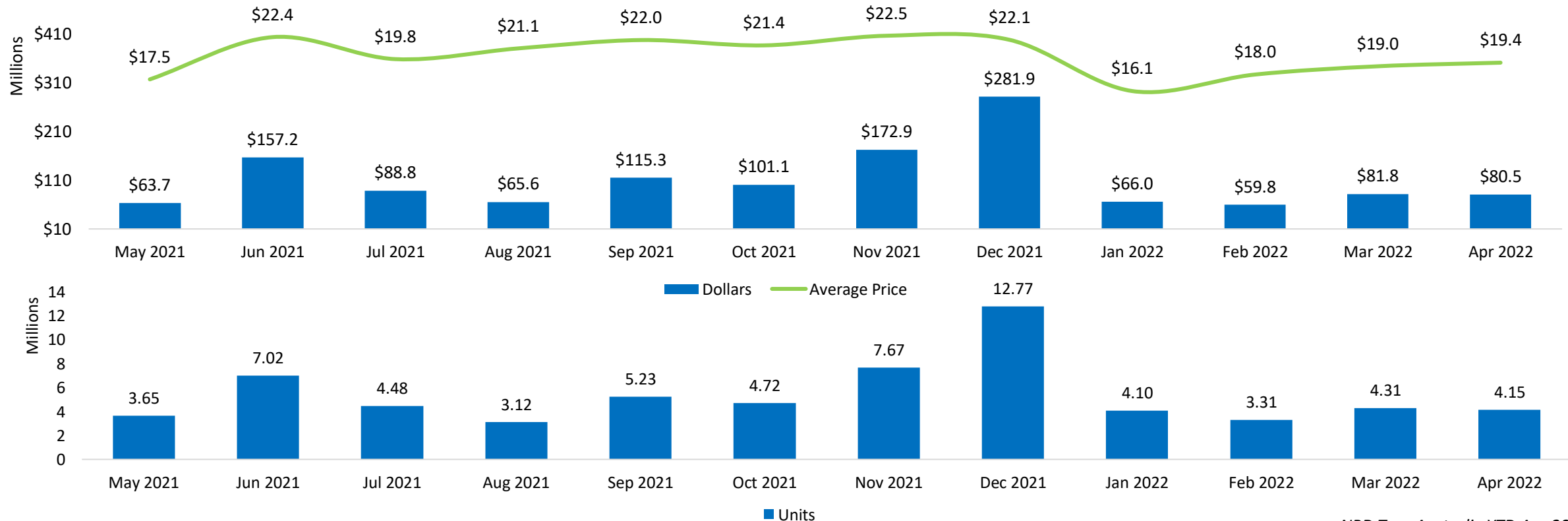
April sales grew +12% on last year due to the shift of Easter falling in March 2021 and April 2022. Dollar sales were 33% above those of 2019 (pre-COVID). 10/13 categories grew YoY in the latest month and 4 grew faster than the total toy industry : Plush(+63%), Building Sets(+21%), Action Figures & acc (+17%) and Youth Electronic(+12%). Globally*, Despite the calendar shift, 2 countries posted a decline for the month UK (-3%) and Netherlands (-6%), but only Italy declined vs. 2019.



Monthly Trend

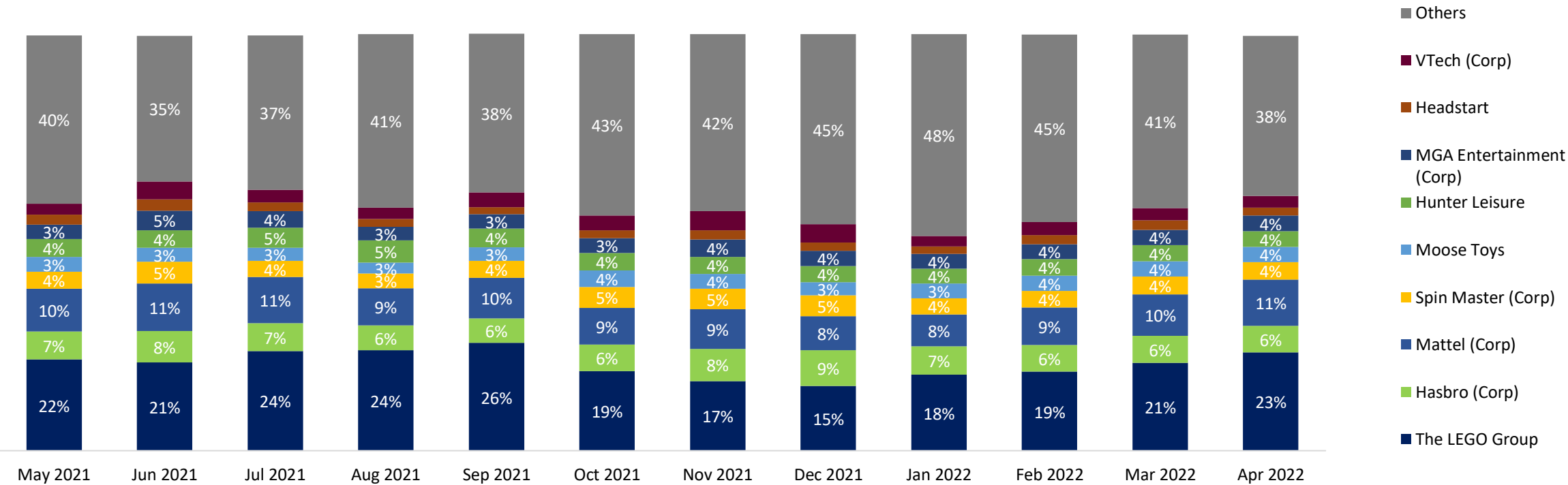
Unit Sales were down -1% vs April'2021 but grew +9% compared to April'2019. Drawing & Craft Supplies and Arts & Crafts collective accounted for 83% of looses in volume sales. Average Price is now up +13% vs. 2021 and grew +22% vs same month 2019. 10/13 categories grew in average price in the latest month. Price segment \$50-\$99 grew +25% and accounted for 33% of total toy dollars (this is 3.7share point increase vs. same month last year).

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



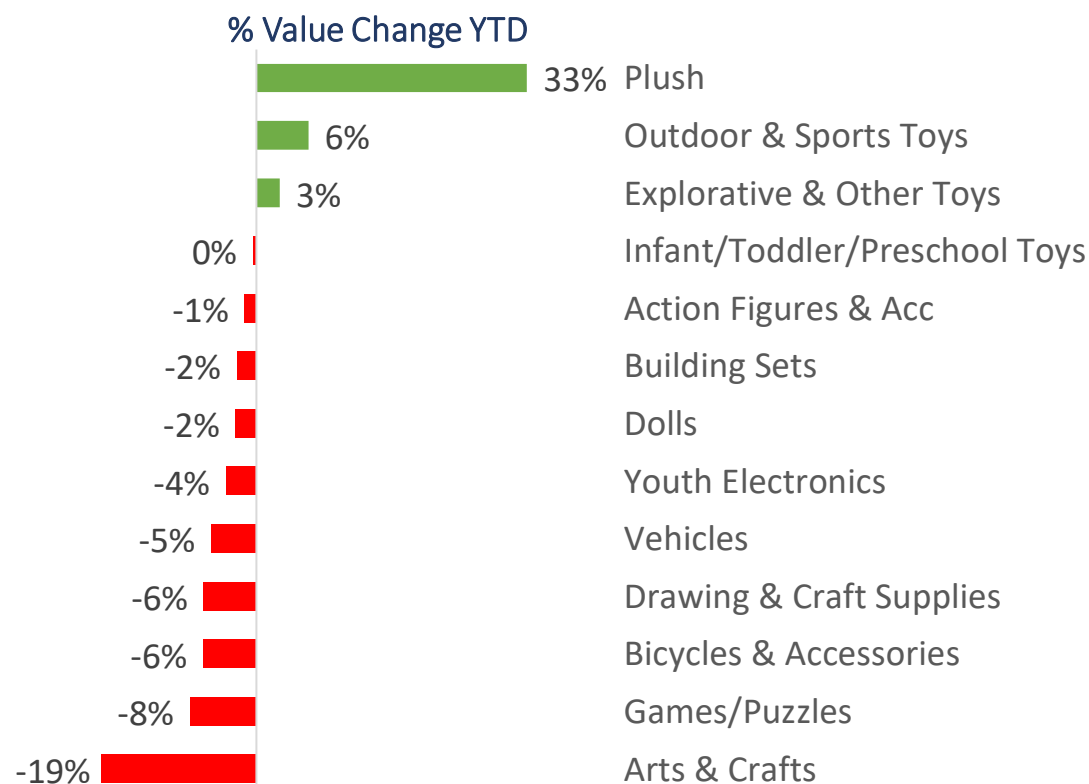
Corporate Manufacturers Trends

In April, 15 out of top 20 corporate manufacturers grew. The LEGO Group grew +21% and recorded largest absolute dollar gains in the latest month followed by Mattel +25% and Banter Toys +29%. Collectively top 10 corporate manufacturers accounted for 66% of total toy dollars in April (this is 2.4 share pts. Increase vs same month last year). Dollar share of corporate manufacturers ranked #11- #20 remained flat at 12%. Barbie(+27%) was the #1 property by absolute dollars and Jurassic Park/World (+>100%) was the top dollar gainer for the latest month.



Category Trends

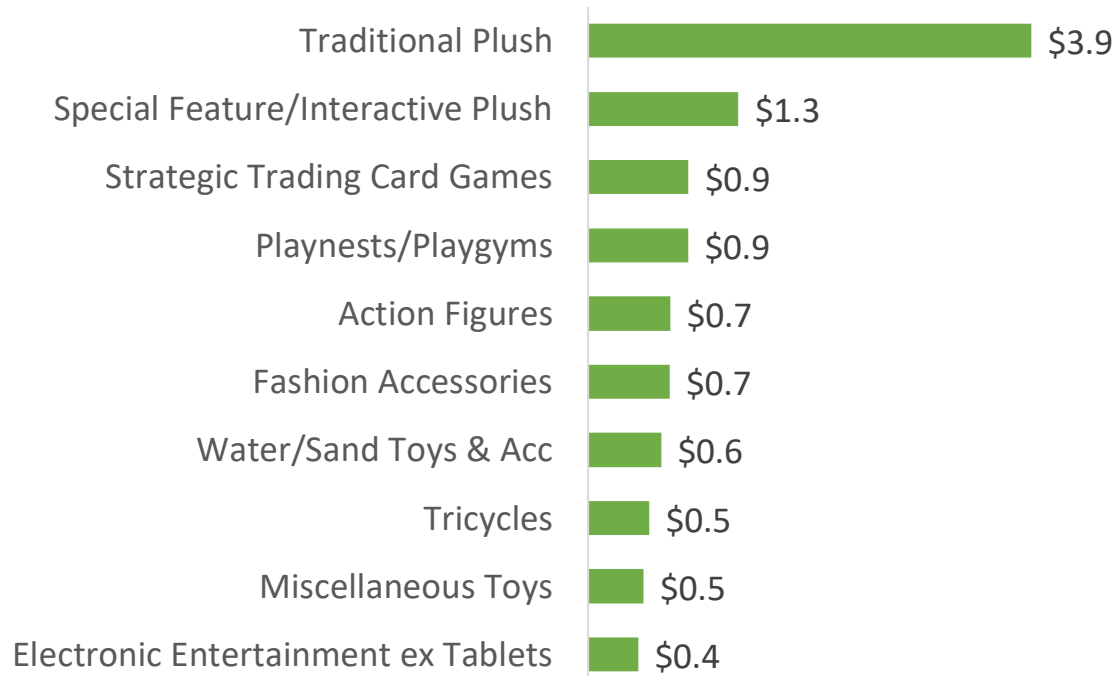
In the latest YTD dollar sales declined -1%, 3 out of 13 supercategories recorded growth in the latest month. Building Sets (-2%) continued to be the category by absolute dollars, followed by Infant/Toddlers and Preschool category(remained flat YoY). Plush grew +33%- Banter Toys, Moose Toys and Zuru contributed 67% to the overall gains within Plush. Outdoor & Sports Toys grew +6%. Hasbro and MGA accounted for 27% of overall gains in Outdoor & Sports Toys category.



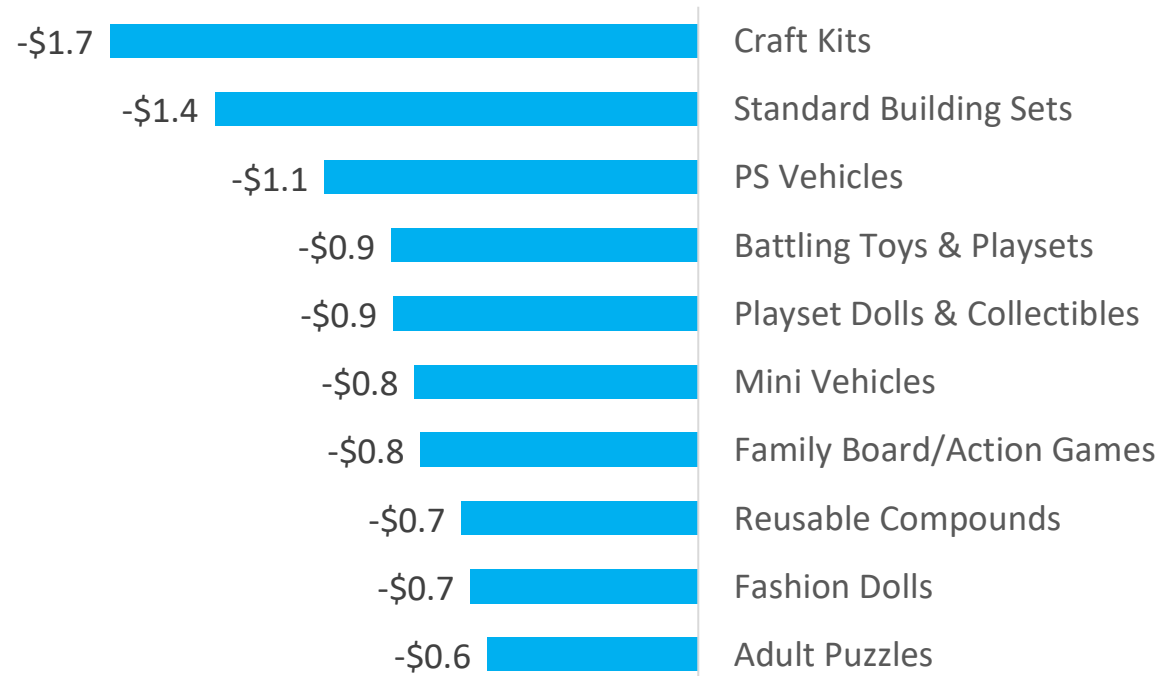
Subclass Trends

In the latest YTD, top two dollar gaining subclasses were from Plush. Traditional Plush grew +32%, within this subclass Squishmallows and Pokémon accounted for 58% of the overall gains. Special Feature/ Interactive Plush had the second largest dollar gains and over 50% of gains within this subclass were driven by Magic Mixies. On the flip side, Craft Kits was the fastest declining subclass- LEGO DOTS, Gemex and Cool Maker accounted for 39% of overall losses within this subclass.

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



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



Property Trends

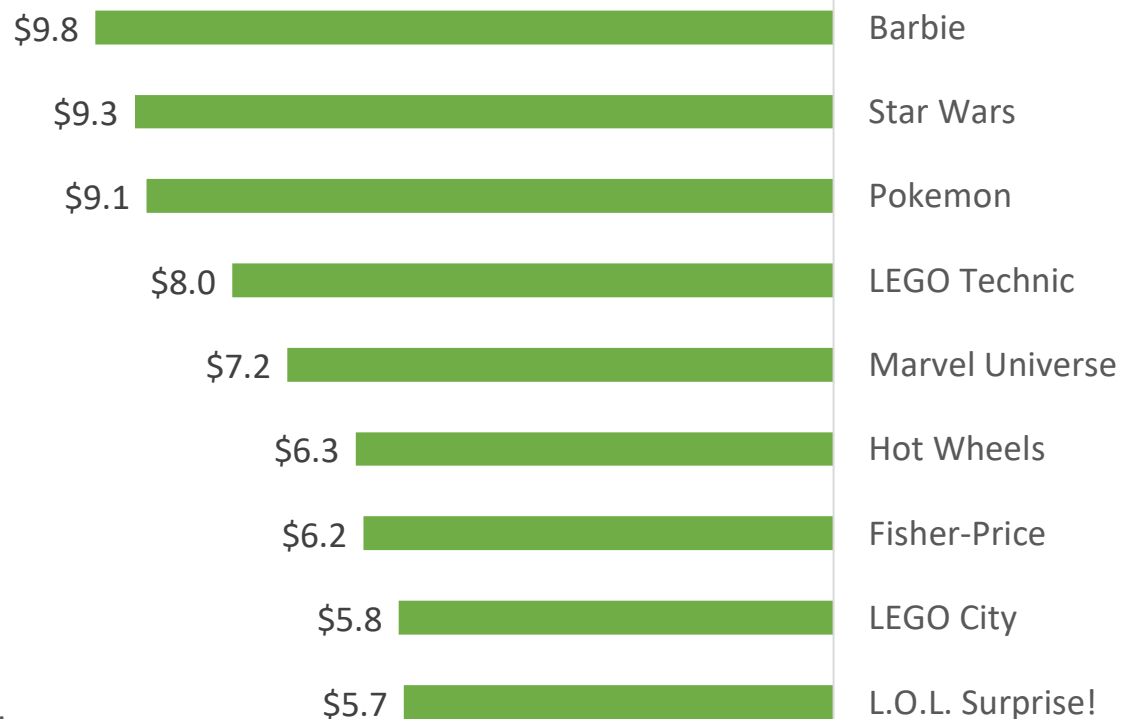
Top 5 new properties April'2022 vs. April'2021

- #1– Magic Mixies
- #2 – Akedo
- #3 – Purse Pets
- #4 – Recyclings
- #5 – Disney Hooyay

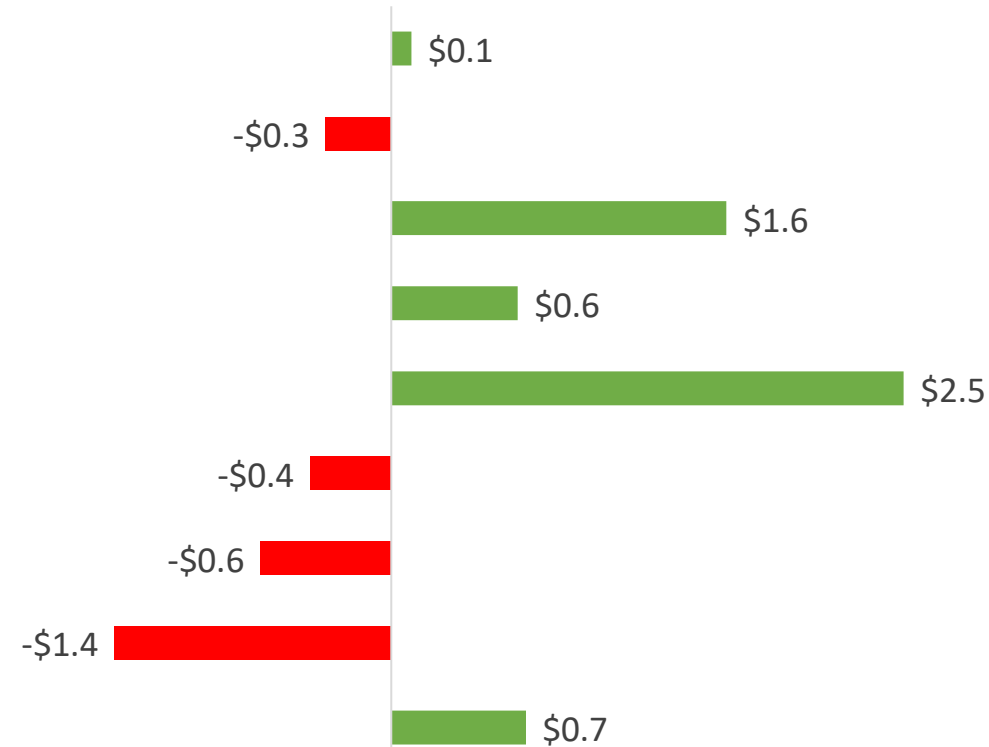
Top 5 dollar gaining properties April'2022 vs. April'2021

- #1 – Jurassic Park/World
- #2 – Squishmallows
- #3 – LEGO Technic
- #4 – Marvel Universe
- #5 – Barbie

Top 10 Properties YTD



\$ Value Change vs YAG



For more information

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