

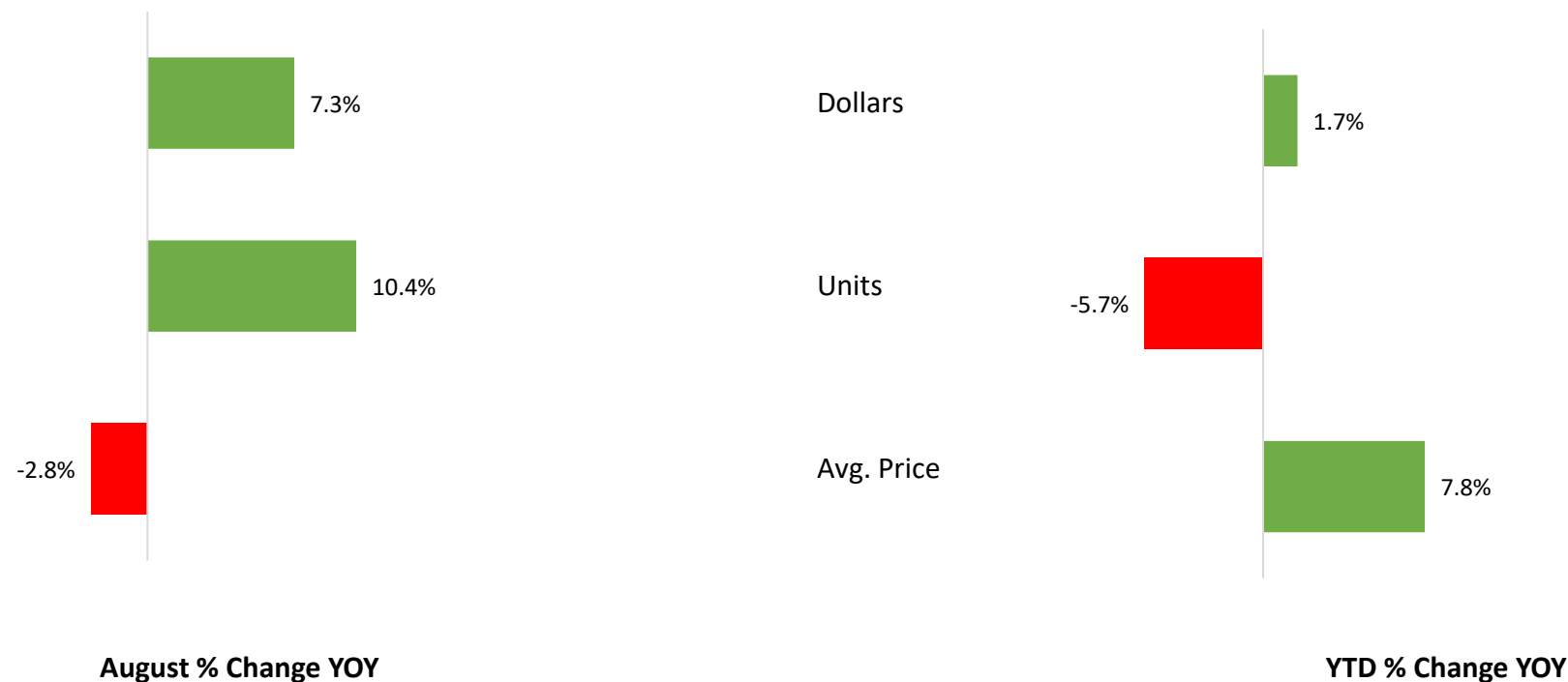
Aug 2022

ATA Report

Australia Toy Association

Industry Trends

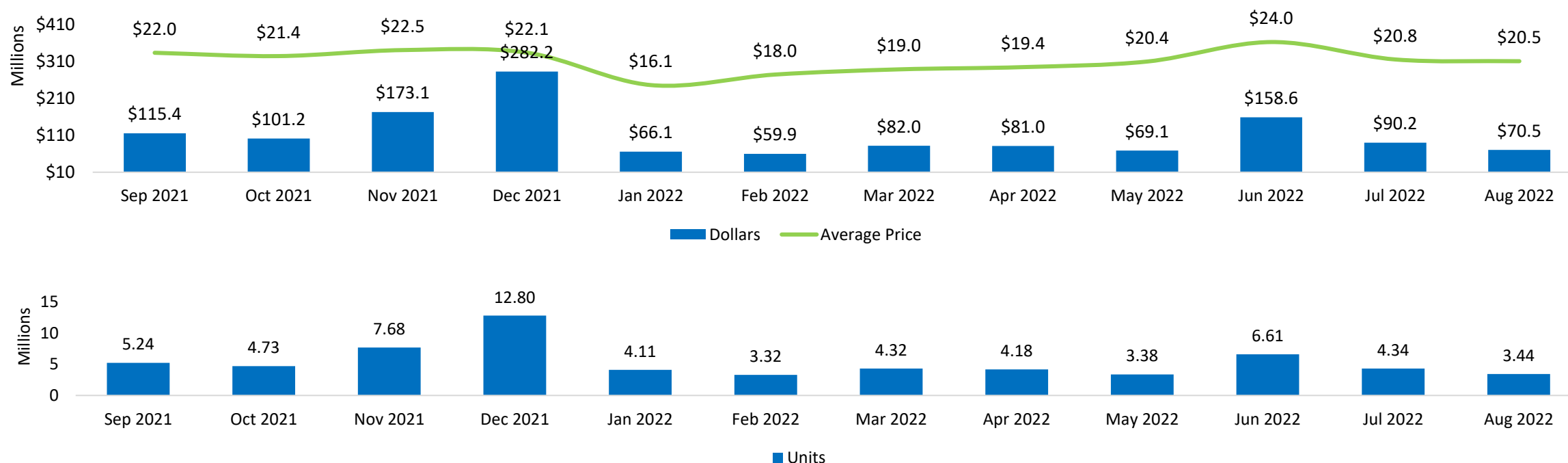
August experienced growth in total dollars by 7.3% vs. 2021. Compared to pre-COVID (2019), August 2022 grew 16% in dollars. Average price slightly dropped where the latest month was down 3% (\$20.48). 6 supercategories were in growth vs. August 2021 – Action Figures & Acc, Building Sets, Dolls, Infant/Toddler/Preschool Toys, Plush and Vehicles. Plush had the largest dollar gain of \$4.5M, accounted for 79% of the gain for the month. YTD, dollars sales grew by +2% driven by Plush. (this is in-line with Global results up +2%).



Monthly Trend

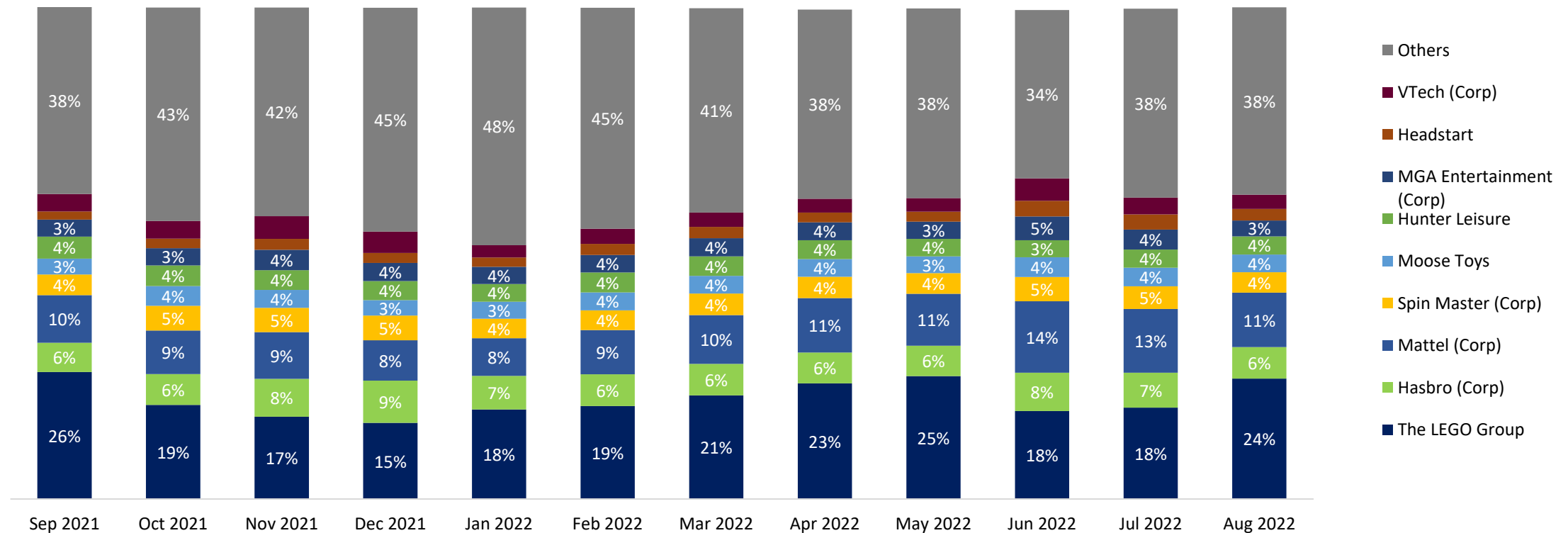
Building Sets was the largest dollar supercategory followed by Infant Toddler Preschool, Dolls, Outdoor & Sports, Vehicles, Games/Puzzles, Action Figs and Plush. Plush had the largest month increase by +79% compared to same month LY, followed by Action Figs +34%, Dolls +23%, vehicles +19%, Infant Toddler Preschool +15% and Building Sets +9% meanwhile Bicycles & Acc had the largest drop of -51%. August LY, the average price was \$21.07, this month has slightly dropped down to \$20.48 from both unlicensed & licensed toys.

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



Corporate Manufacturers Trends

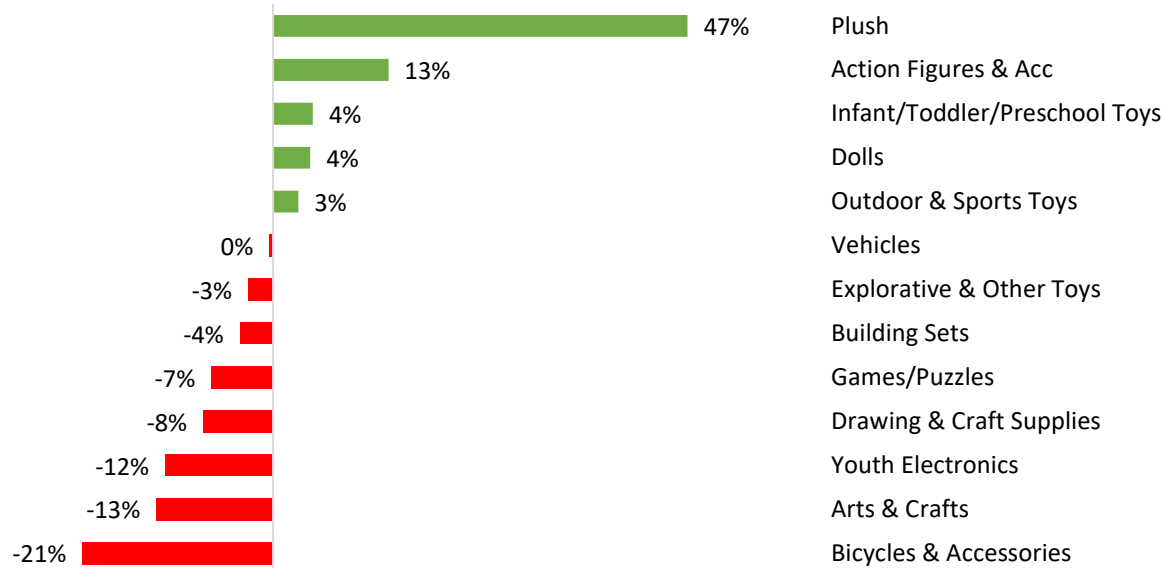
LEGO remained as the leading manufacturer in August and has the same share vs. same month LY, however there's a share increase comparing from Jul 2022 by 6 share points. Mattel had the most dollar gain of \$1.9M and gained 2 share points vs. same period last year. In YTD, Mattel had the most dollars gained of (+\$9.5M) driven by Jurassic Park/World and Barbie. For the latest month, Star Wars was the leading property, followed by LEGO Star Wars and Lego Technic. Jurassic World had the largest gain dollar for the YTD of (+\$12M) followed by Squishmallows (+\$5.5M).



Category Trends

For the latest YTD, 5 supercategories grew, Plush had the largest growth where Traditional Plush grew +48%, mainly driven by Squishmallows and Interactive Plush grew +43% driven by Magic Mixes. Action Figures grew +13% from several properties: Jurassic Park/World followed by Toy Story/Light Year and Akedo. There was slight growth for Infant/Toddler/Preschool Toys by Cocomelon and Gabby's Dollhouse. Building sets continue to decline, LEGO Harry Potter was the largest dollar declining property for Building Sets.

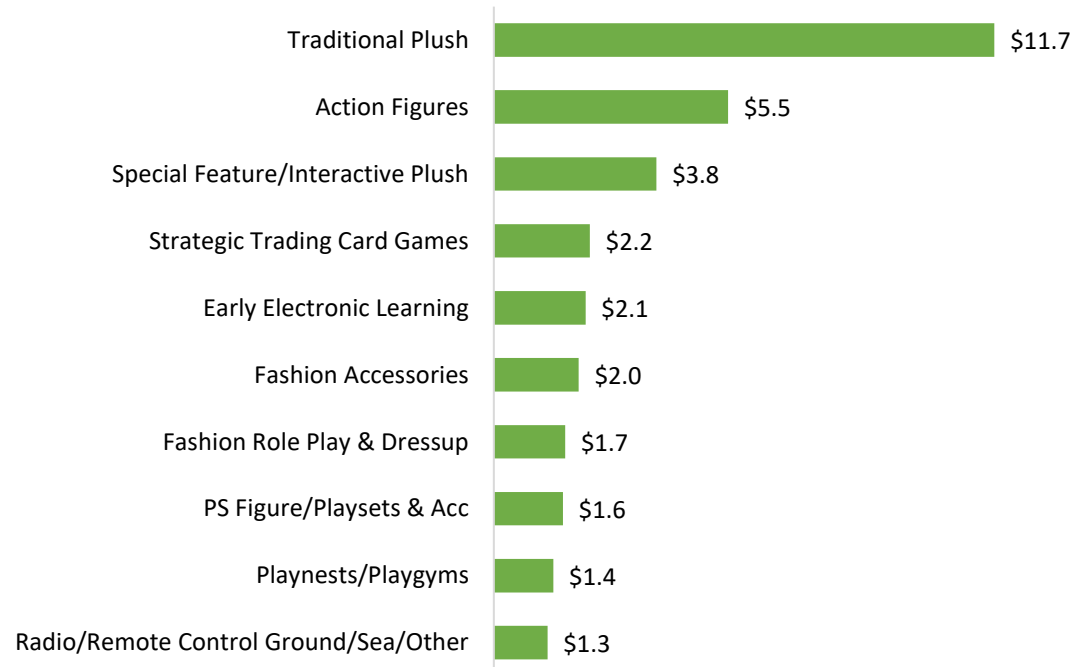
% Value Change YTD



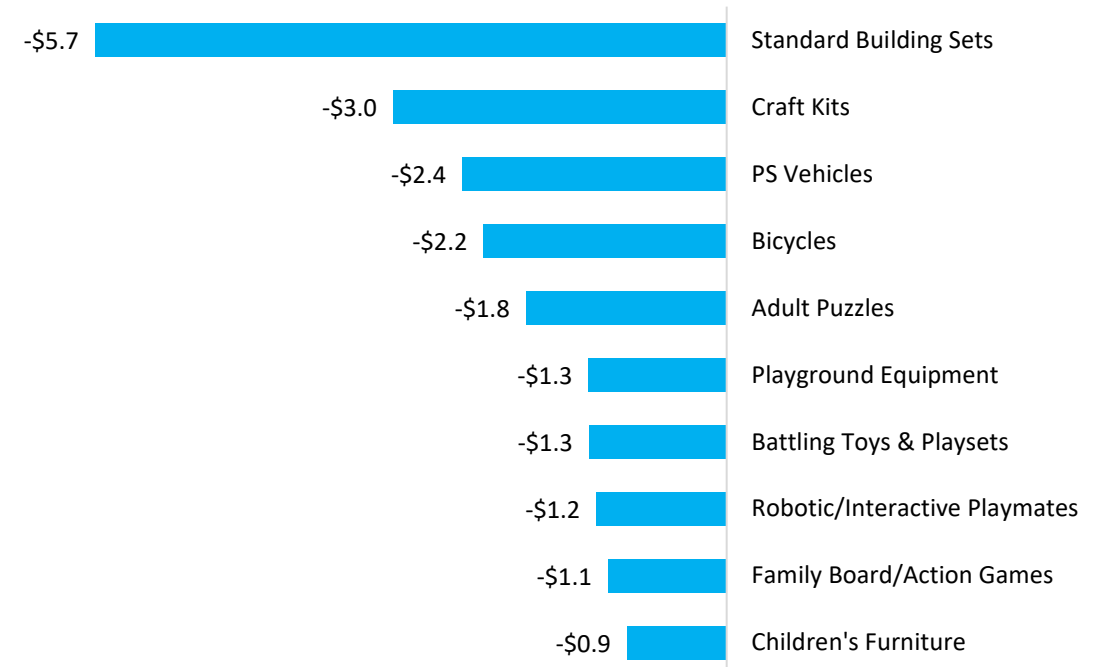
Subclass Trends

Trends for Plush were similar to the previous month, where Traditional Plush is the top dollar contributor driven by Squishmallows, and Interactive Plush driven by Magic Mixies. Within Action Figs, Jurassic World accounted for 25% of Action Figs and gained the most share +15 points followed by Toy Story/Light Year accounted for 6% and gained share of +5 points. On the declining side, Standard Building Sets continue to experience strong decline further from last month YTD driven by weak sales from LEGO Harry Potter.

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



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



Property Trends

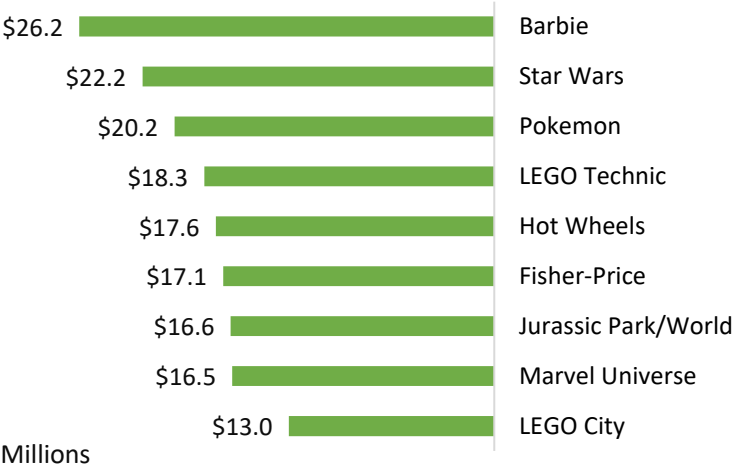
Top 5 new properties Aug'22 vs. Aug'21

- #1– Magic Mixies
- #2 – Gabby’s Dollhouse
- #3 – Disney Encanto
- #4 – LEGO Toy Story
- #5 – Marble Rush

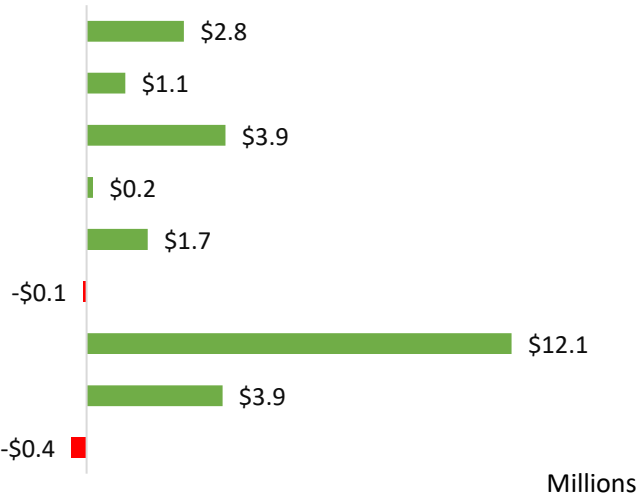
Top 5 dollar gaining properties Aug'22 vs. Aug'21

- #1 – Jurassic Park/World
- #2 – Star Wars
- #3 – Hot Wheels
- #4 – Squishmallows
- #5 – Toy Story/Lightyear

Top 10 Properties YTD



\$ Value Change vs YAG



For more information

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