

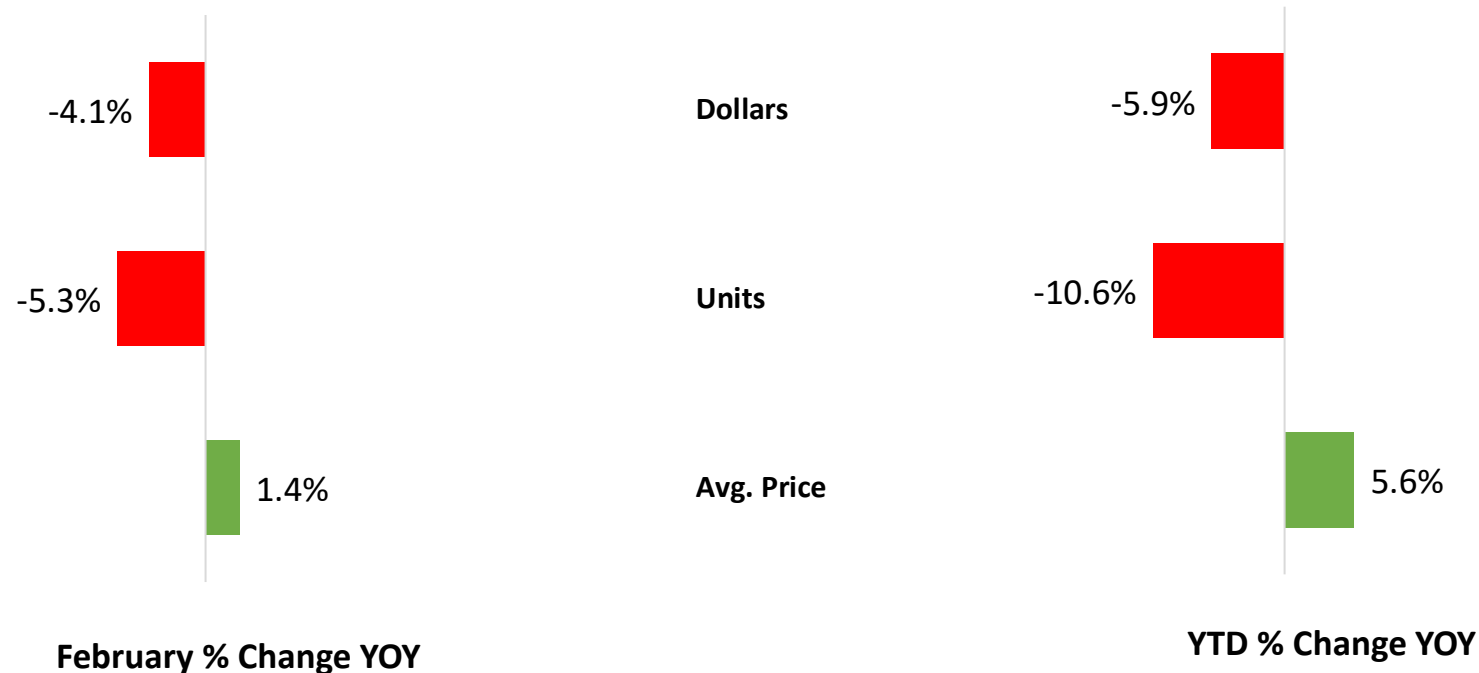
Feb 2022

ATA Report

Australia Toy Association

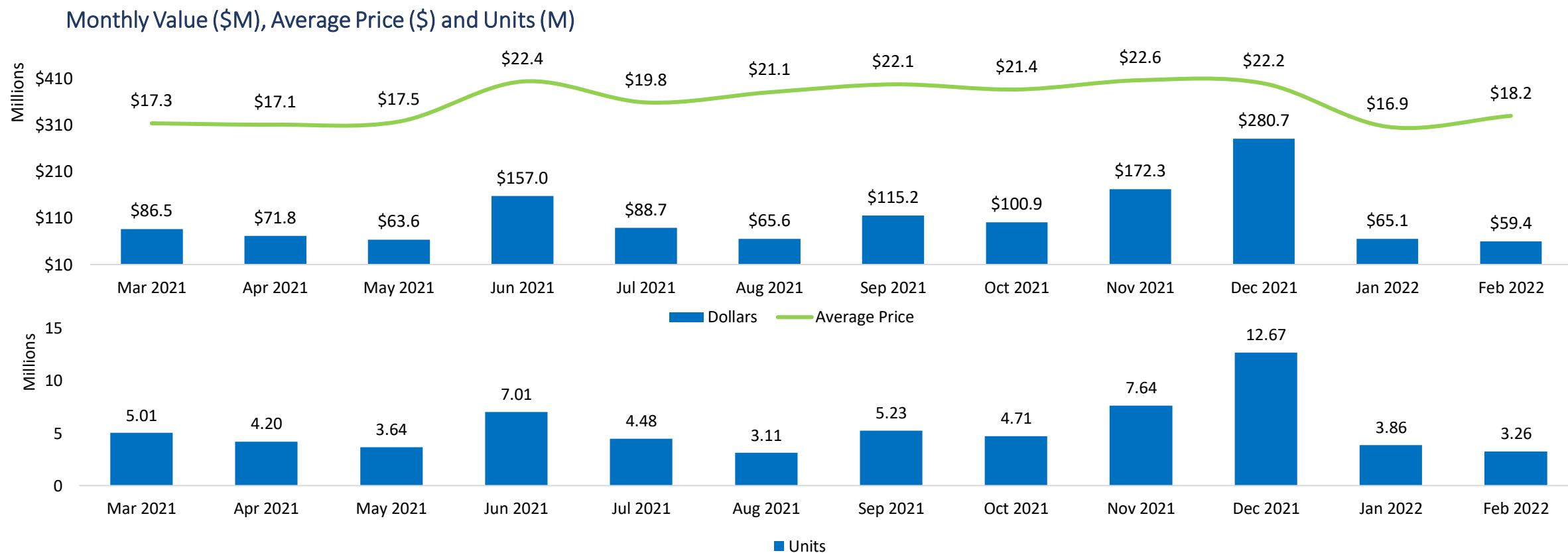
Industry Trends

In February 2022, Australia toy sales declined -4% but still represented an elevated level of sales, +20% vs. Feb'2020. 4/13 categories grew YoY in the latest month: Plush(+24%), Drawing & Craft Supplies(+14%), Outdoor & Sports Toys(+11%), Explorative & Other Toys(+3%). Globally*, 5 countries(Canada, Belgium, France, UK & Australia) reported a decline year-on-year, but all recorded sales at least flat compared to the same period in 2020.



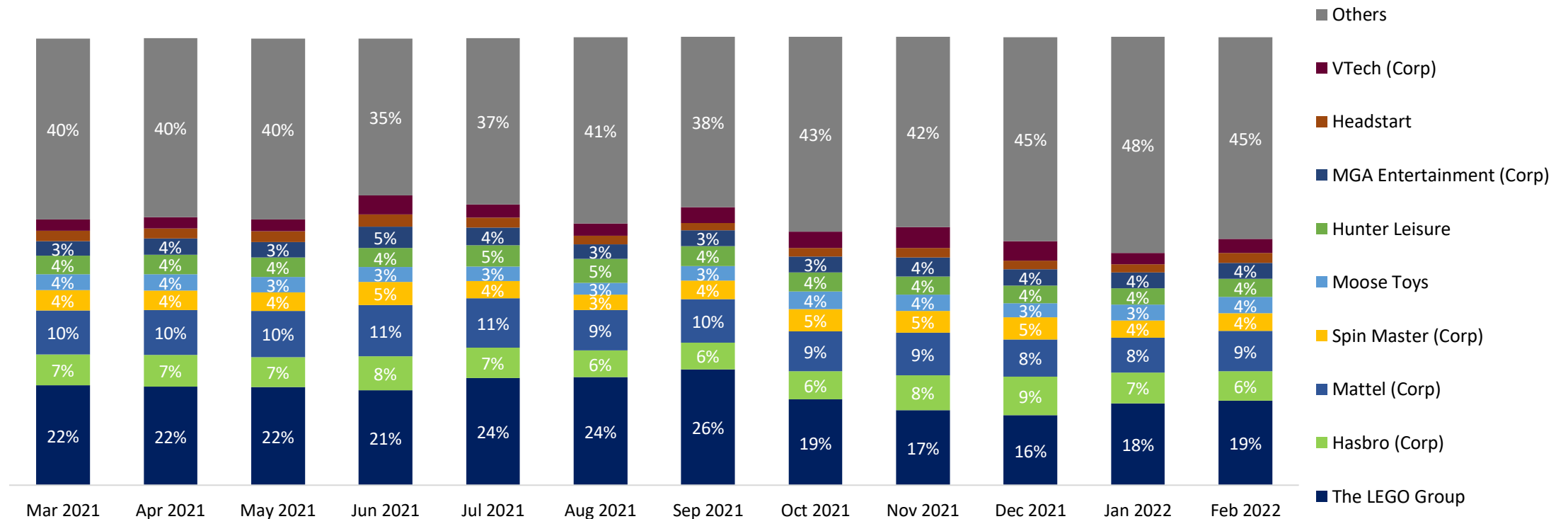
Monthly Trend

Unit sales were -5% down vs February 2021 but +11% above vs. February 2020. Infant/Toddler/Preschool, Vehicles and Dolls collectively accounted for over 50% of losses in volume sales. Average Price grew +1% in the latest month where 9/13 categories recorded growth. Price segment \$50-\$99 grew +10% and accounted for 32% of total toy dollars (this is 2.1 share point increase vs. same month last year).



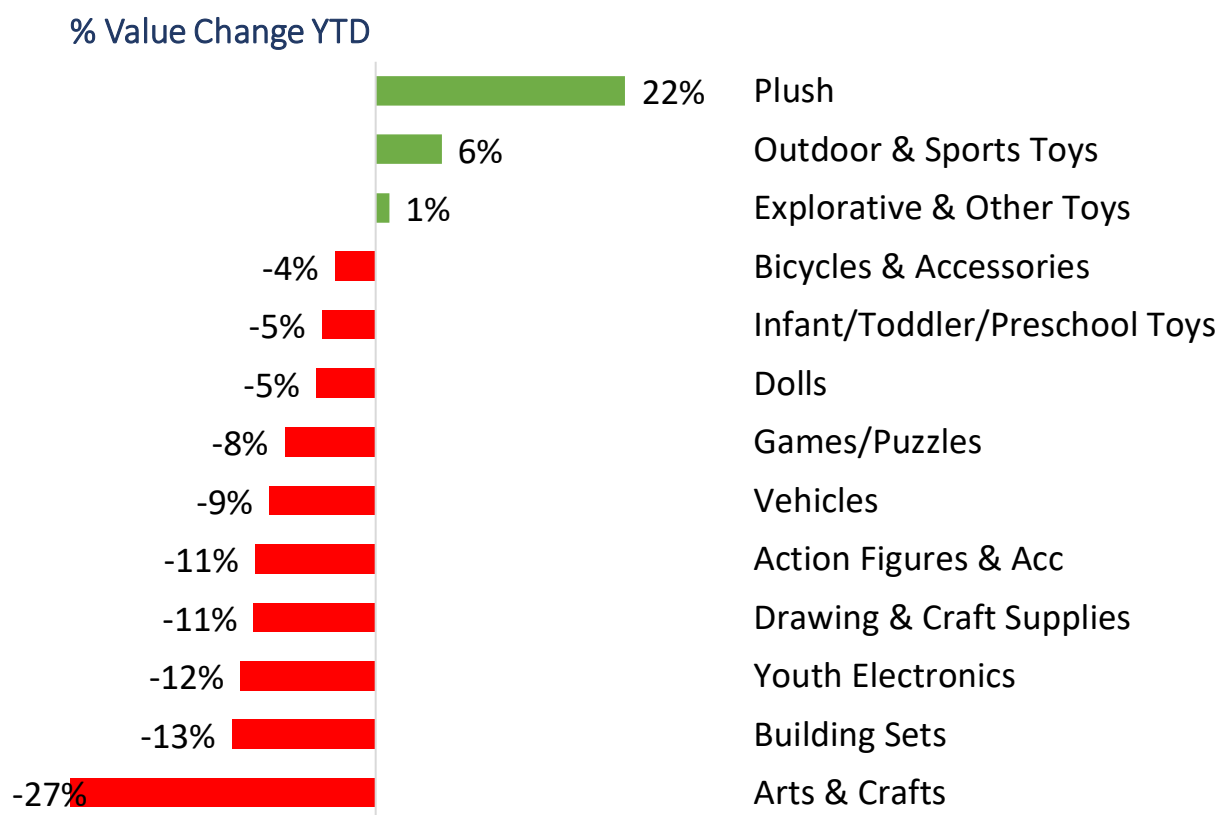
Corporate Manufacturers Trends

In February, 9 out of top 20 corporate manufacturers grew. Banter Toys(+23%) recorded largest absolute dollar gains in the latest month followed by MGA (+23%) and Zuru (+29%). Collectively top 10 corporate manufacturers accounted for 59% of total toy dollars in February (this is 1.7 share pts. decline). Corporate manufacturer ranked #11- #20 picked up share and accounted for 13% value share in February (LY value share: 12%). Star Wars(-10%) was the #1 property by absolute dollars and Marvel Universe (+59%) was the top dollar gainer for the latest month.



Category Trends

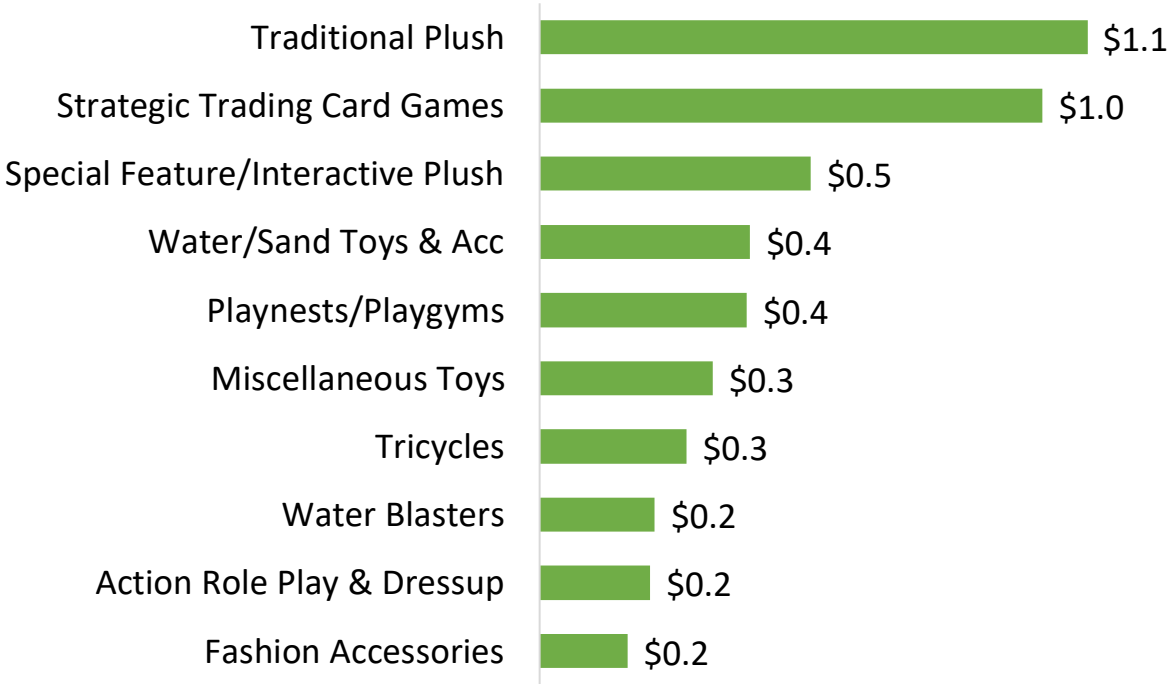
Only 3 supercategories grew YoY for the first 2 months of the year. Building Sets was still #1 by absolute dollars ,was down -13% followed by Infant/Toddler Preschool toys (-5%). Plush grew +22%: Banter Toys, Moose Toys and Zuru contributed 65% to the overall gains within Plush. Outdoor & Sports Toys grew +6%. Hasbro, Action Sports and MGA accounted for 30% of overall gains in Outdoor & Sports Toys category. Explorative Toys grew +1% : Newell Brands and Zuru contributed over 30% of overall gains with this category.



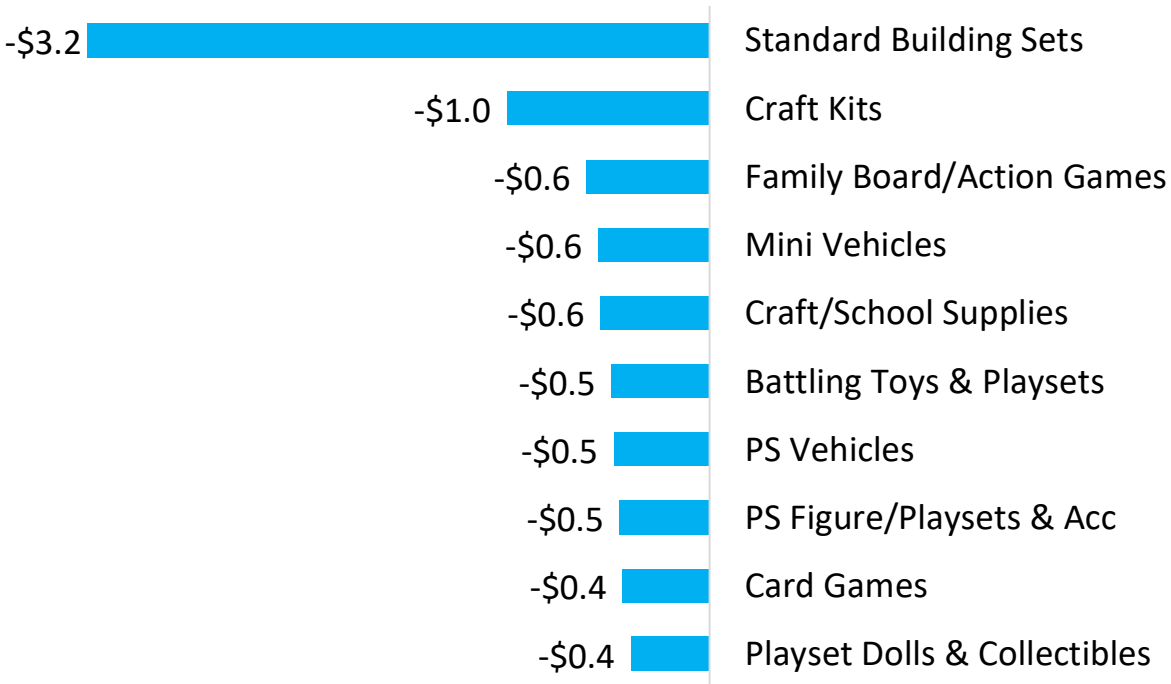
Subclass Trends

Drilling down further, Traditional Plush(+19%) was the top dollar gaining subclass for the latest YTD. Squishmallows accounted for 50% of gains within Traditional Plush. Strategic Trading Card Games (+52%): Pokémon accounted for 84% of gains within this subclass. Special Feature/Interactive Plush(+34%) was the 3rd largest dollar gaining subclass: Magic Mixies accounted for 49% of overall gains within this subclass. On the flip side Standard Building sets and Crafts Kits accounted for 31% of overall losses in the latest YTD.

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



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



Property Trends

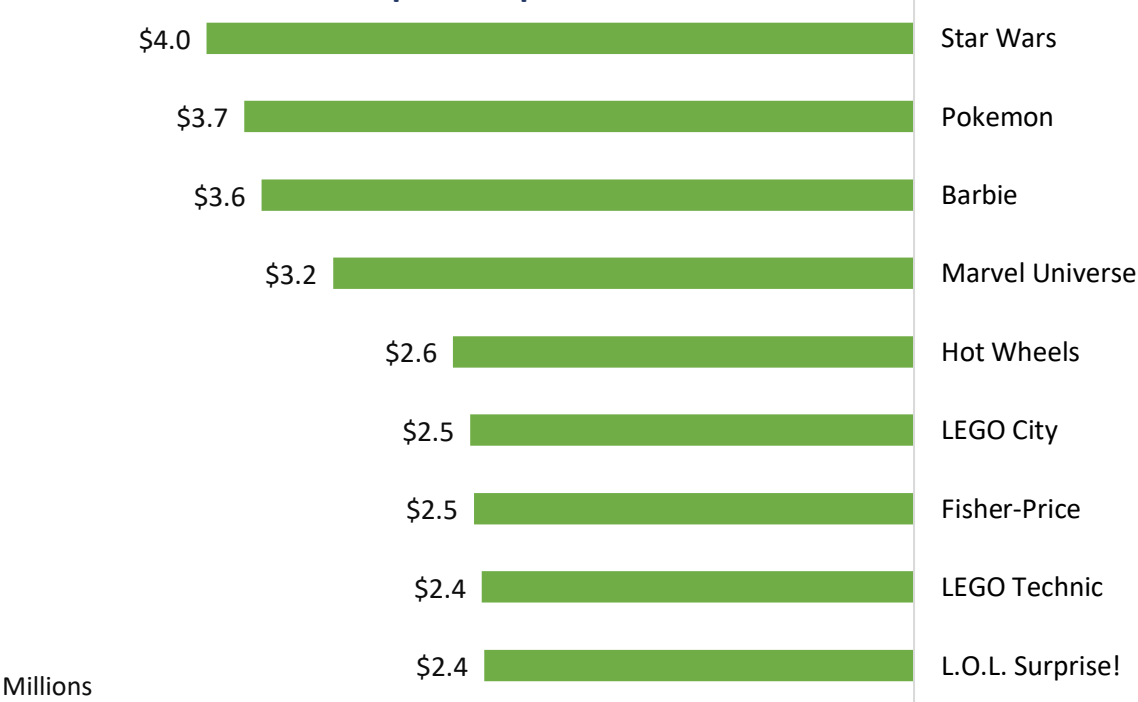
Top 5 new properties Feb'2022 vs. Feb'2021

- #1– Disney Encanto
- #2 – Magic Mixies
- #3 – Akedo
- #4 – Disney Hooyay
- #5 – Marble Rush

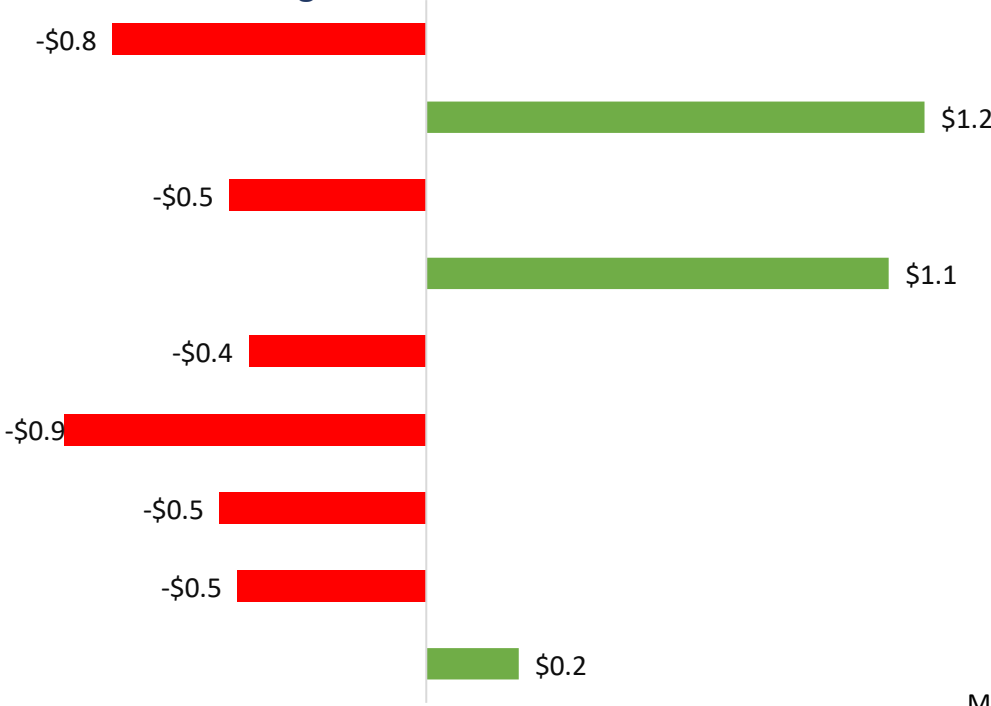
Top 5 dollar gaining properties Feb'2022 vs. Feb'2021

- #1 – Marvel Universe
- #2 – Squishmallows
- #3 – Pokémon
- #4 – Disney Encanto
- #5 – Magic Mixies

Top 10 Properties YTD



\$ Value Change vs YAG



For more information

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