

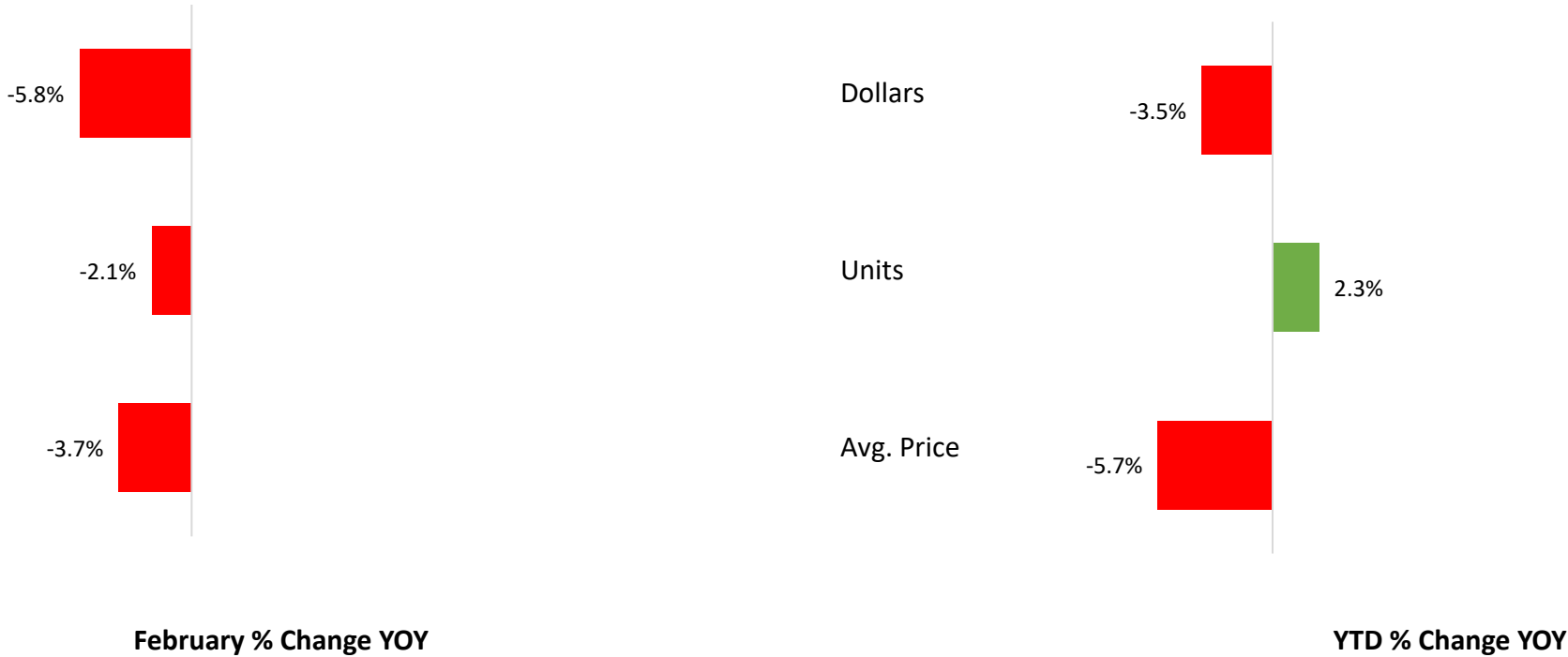
Feb 2023

# ATA Report

Australia Toy Association

# Industry Trends

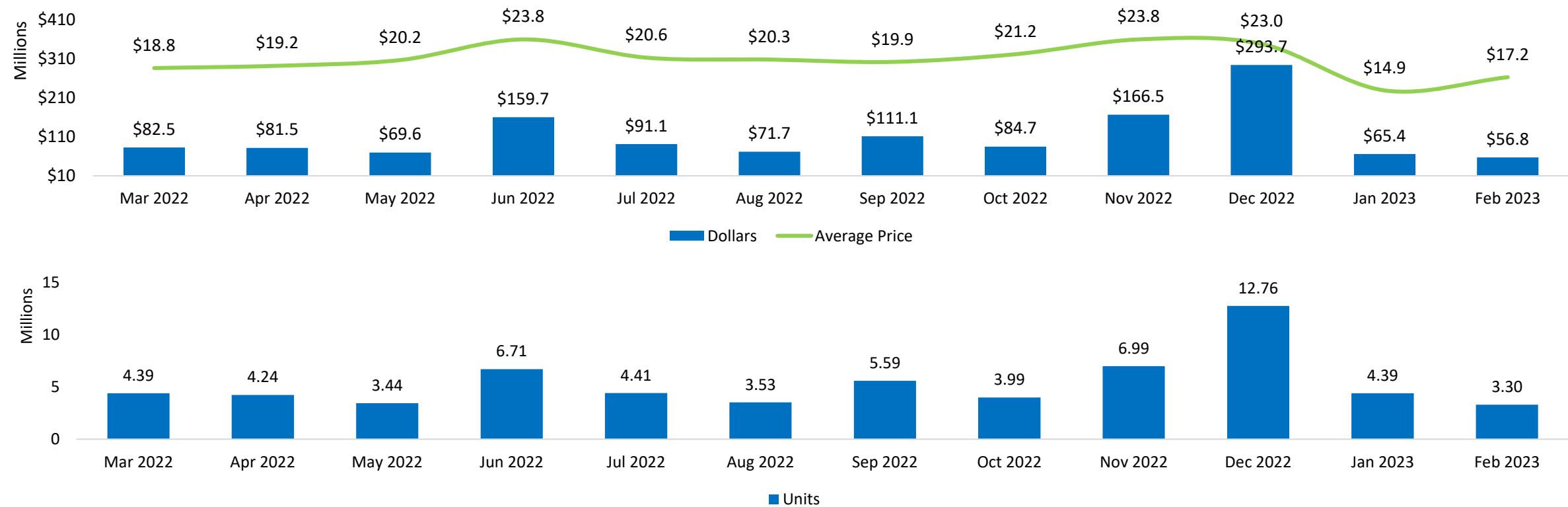
February 2023 experienced -6% decline vs 2022. Units decline -2% and average price decline -4% in the latest month (\$17.21). Outdoor & Sports Toys (+6%) and Games/Puzzles (+3%) were the 2 supercategory gainers for the month, meanwhile Dolls (-15%), Infant/Toddler/Preschool Toys (-10%) and Building Sets (-7%) were the 3 biggest contributors to the month decline. For YTD Feb, total dollars declined by -4% vs. 2022 as dolls was the largest supercategory drop of -14% (-\$2M). Global Results dropped -1% for the YTD.



# Monthly Trend

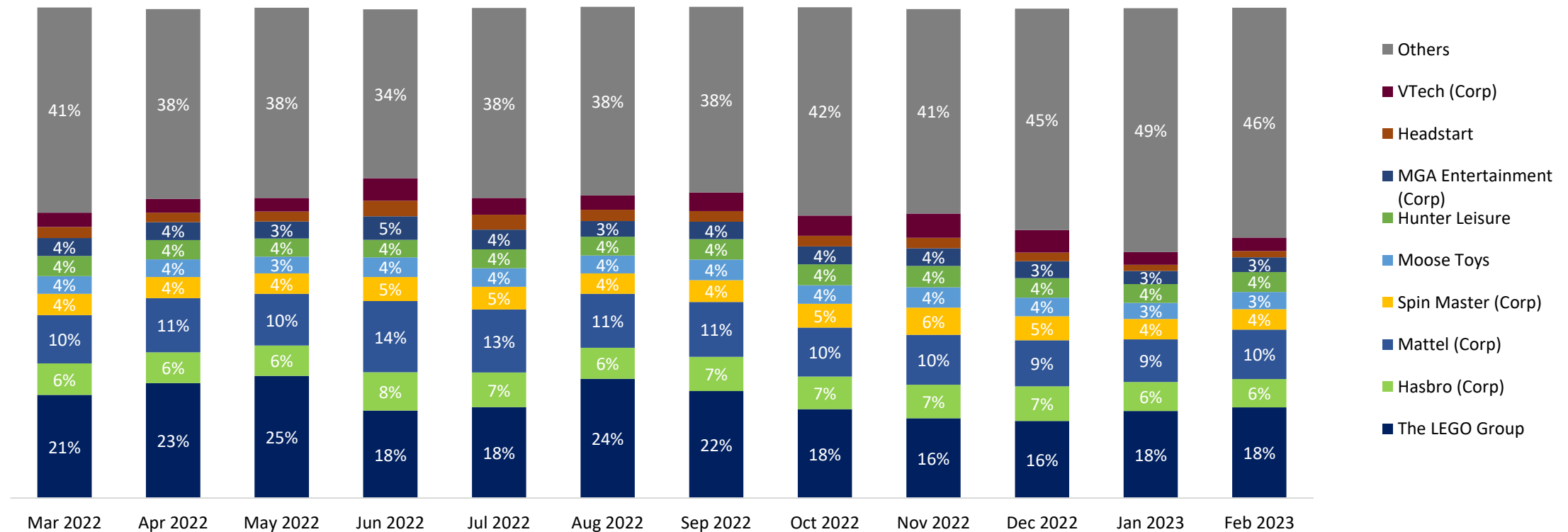
For February 2023, Building Sets was the largest dollar made supercategory followed by Infant/Toddler/Perschool Toys, Outdoor & Sports Toys, Dolls, Games & Puzzles and Plush. Dolls had the largest dollar decline of -15% (-\$1M). Average price was \$17.88 in 2022 and declined to \$17.21 for 2023 driven from both licensed and unlicensed toys.

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



# Corporate Manufacturers Trends

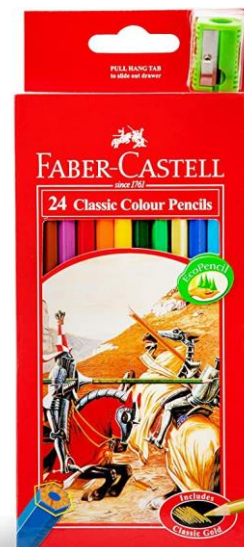
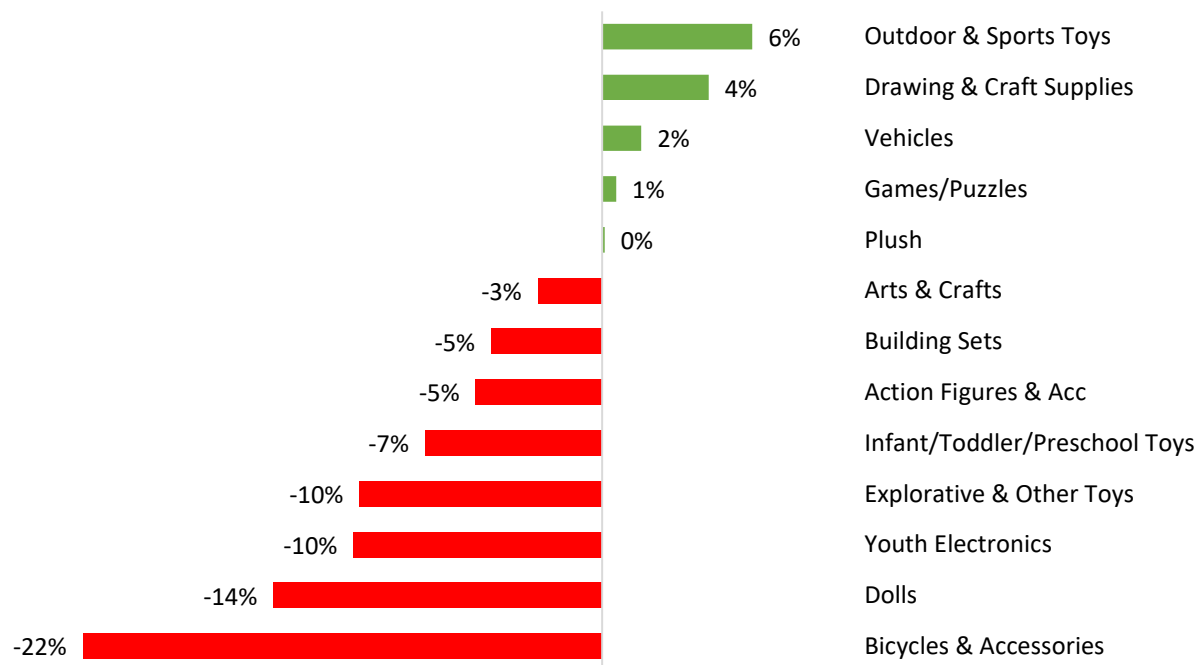
For the month February 2023, LEGO is the leading dollar manufacturer however dropped -8% in dollar and dropped -1 share point. Banter Toys has the largest growth of +57% with +2 share points driven by Squishmallows. Pokémon is the leading dollar property followed by Hot Wheels and Barbie for the month. For the YTD Feb 2023, the largest dollar gained properties are Pokémon, Squishmallows and Hot Wheels. The leading manufacturer dollar gainers for YTD Feb are Banter Toys (+42%), followed by Mattel (+9%) and Faber-Castell (+21%)



# Category Trends

For YTD Feb, 4 supercategories grew, Outdoor & Sports Toys had the largest growth of +6% (+\$1M) mainly driven from Wahu and Bunch O Balloons. Drawing & Crafts grew +4% (+\$289K) mostly from Faber – Castell. Growth for Vehicles +2% (+\$154K) from Hot Wheels and Games/Puzzles slightly grew +1% (+\$60K) mostly from Pokémon Strategic Trading Card Games. Dolls had the largest drop of -14% (-\$2M) contributed from L.O.L Surprise!, Barbie and Our Generation.

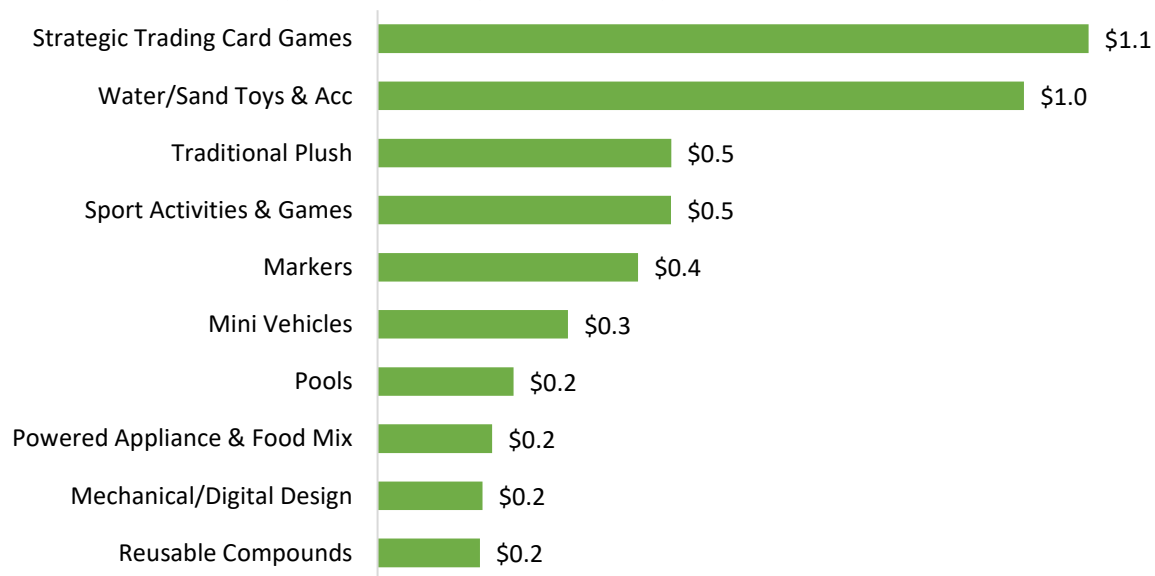
% Value Change YTD



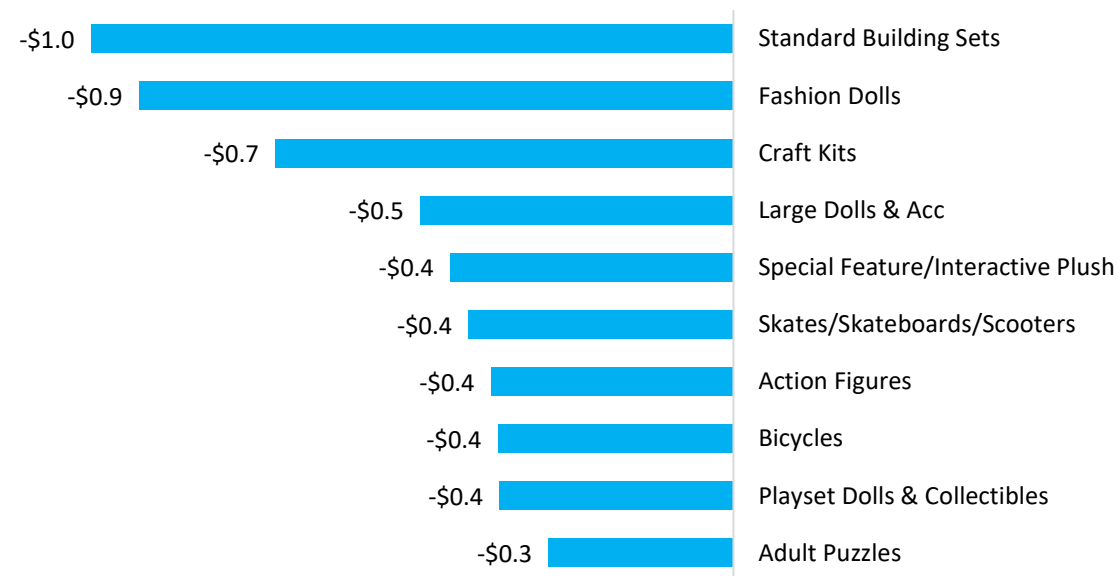
# Subclass Trends

For Games/Puzzles, Strategic Trading Card Games dominated this month which grew +45% (+\$600k) predominately driven from Pokémon. In Outdoor & Sports Toys, water/sand Toys & Acc grew +35% (+\$404K) from Wahu and Bunch O Balloons. Mini vehicles grew +9% (+\$126K) driven from Hot Wheels. For Drawings & Craft Supplies, Markers grew +21% (+\$80K) driven mostly from Faber-Castell manufacturer. Plush supercategory was flat but traditional plush performed better than Feb 2022, which grew +3% (+\$100K) driven from Squishmallows. Standard Building Sets dropped -7% (-\$756k) from LEGO Star Wars, LEGO Technic and Harry Potter, meanwhile for YTD Feb dropped -5% (-\$1M).

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



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



# Property Trends

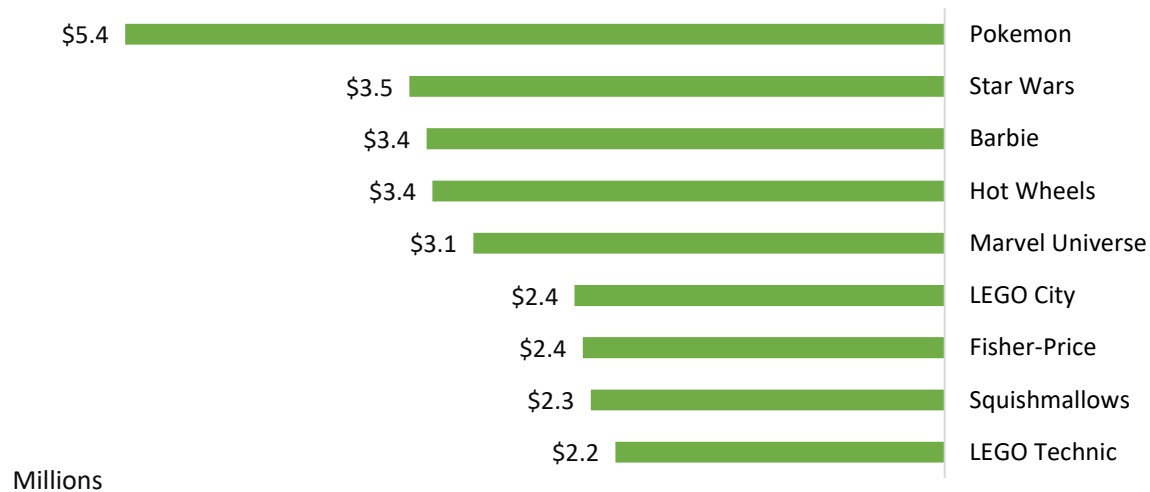
## Top 5 new properties Feb'23 vs. Feb'22

- #1 – Avatar The Movie
- #2 – Aston Martin
- #3 – Aphmau
- #4 – LEGO Disney Moana/Vaiana/Oceania
- #5 – Mermaze Mermaidz

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

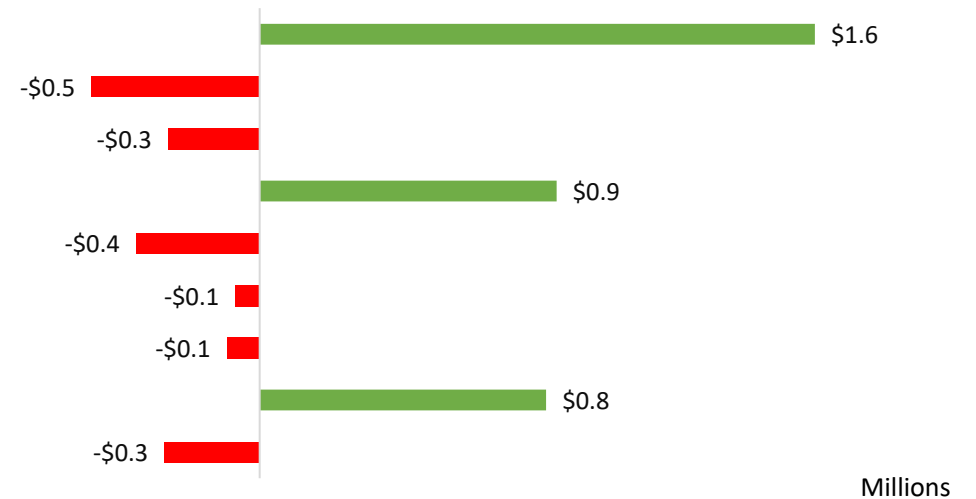
- #1 – Pokémon
- #2 – Squishmallows
- #3 – Hot Wheels
- #4 – Avatar The Movie
- #5 – Gabby's Dollhouse

### Top 10 Properties YTD



*New = \$0 in the same month previous year*

### \$ Value Change vs YAG



## For more information

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