

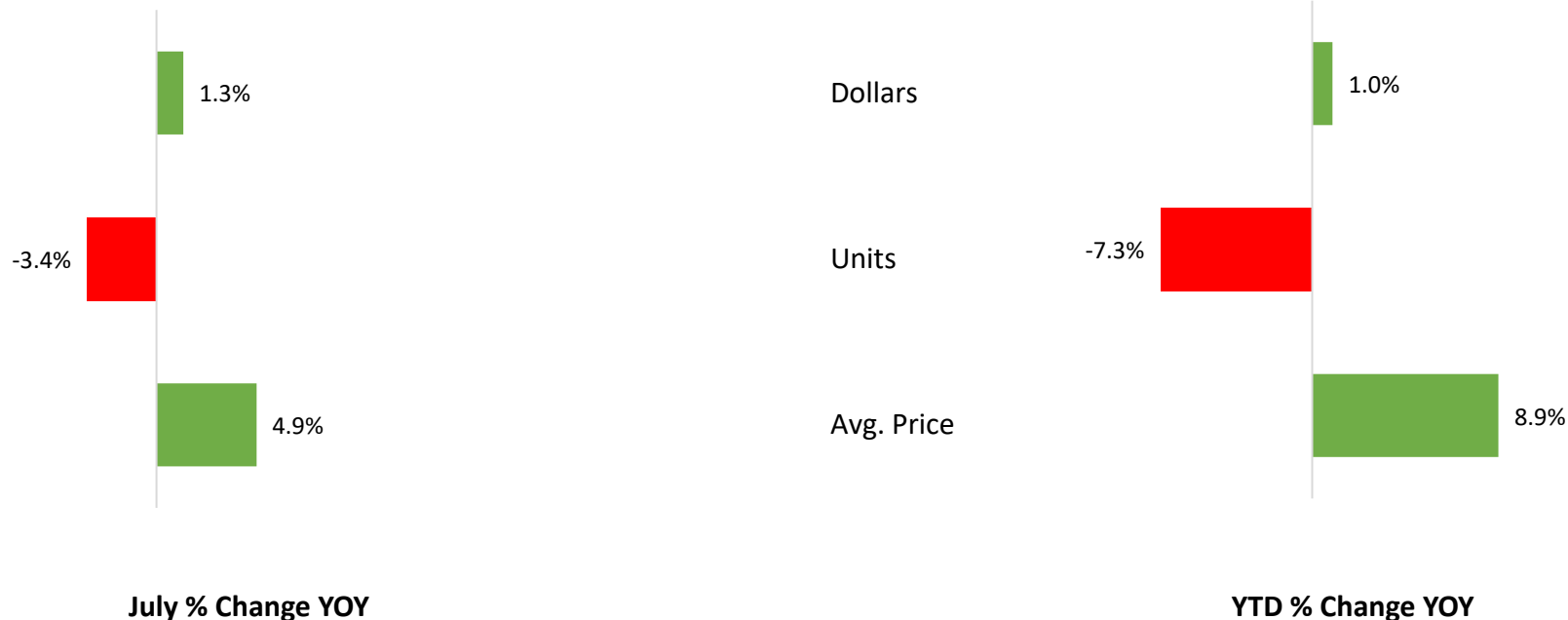
Jul 2022

ATA Report

Australia Toy Association

Industry Trends

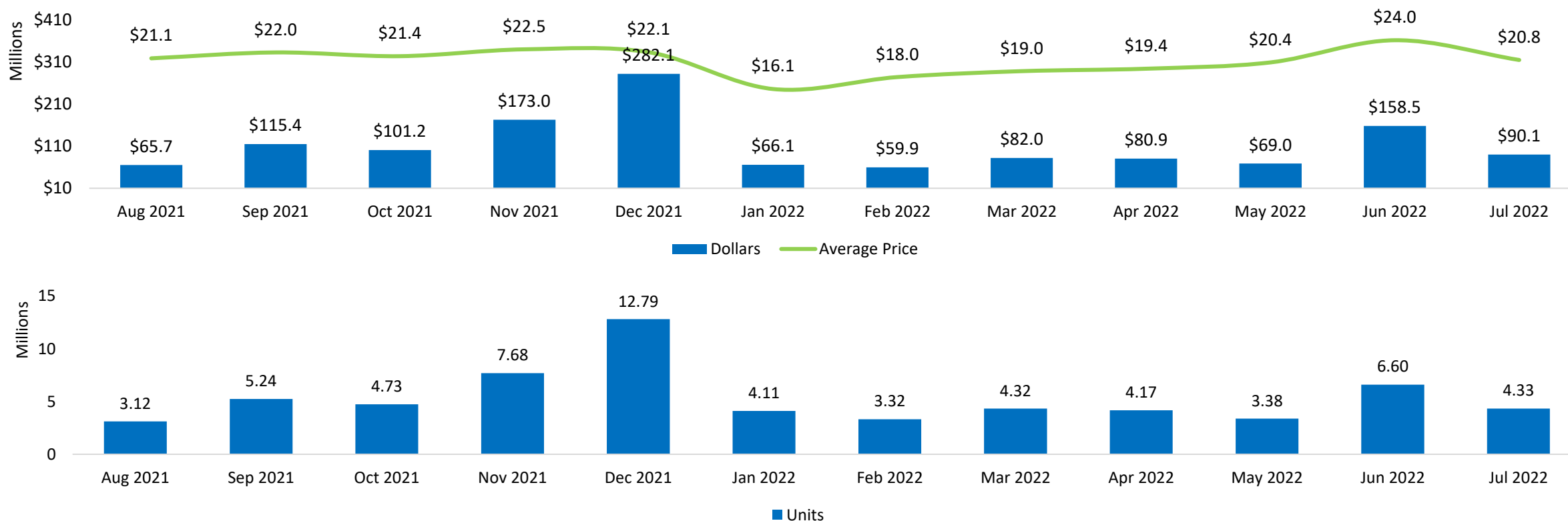
July experienced slight growth in dollars. Compared to pre-COVID (2019), July 2022 grew +19%. Average price continued to increase each month where the latest month was up 5% (\$20.80). 6 supercategories were in growth vs. July 2021 – Plush, Action Figs, Dolls, Infant Toddler Preschool, Vehicles and Outdoor & Sports Toys. Plush and Action Figures had the largest dollar gains, accounted for 58% of the gains for the month. Year-to-date, dollar sales grew by +1 % (Global results up slightly +2%, driven by Plush)



Monthly Trend

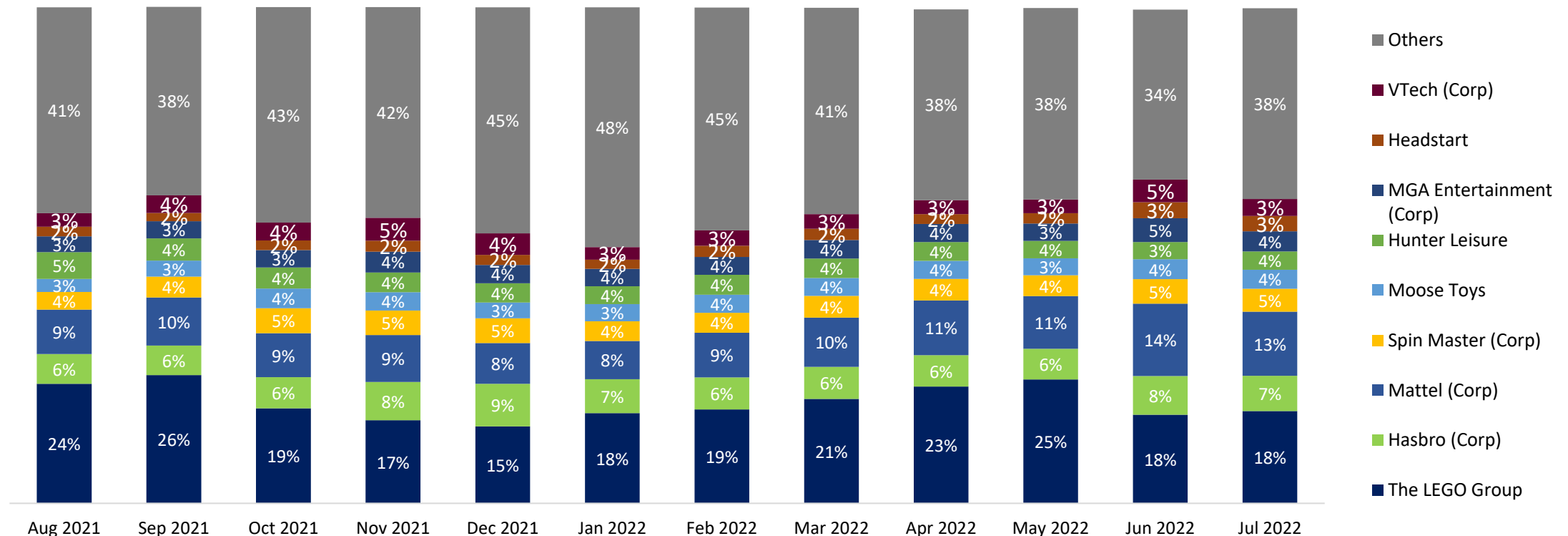
Building Sets was the largest dollar declining supercategory in July. Plush was the fastest growing +73% followed by Action Figs +26%, Vehicles +12%, Dolls +10%, Infant Toddler Preschool +9% and Outdoor & Sports +1%. Unlike last month where average price was boosted by both licensed and unlicensed toys, this month, growth of average price was driven by unlicensed toys – Infant Toddler Preschool and Dolls.

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



Corporate Manufacturers Trends

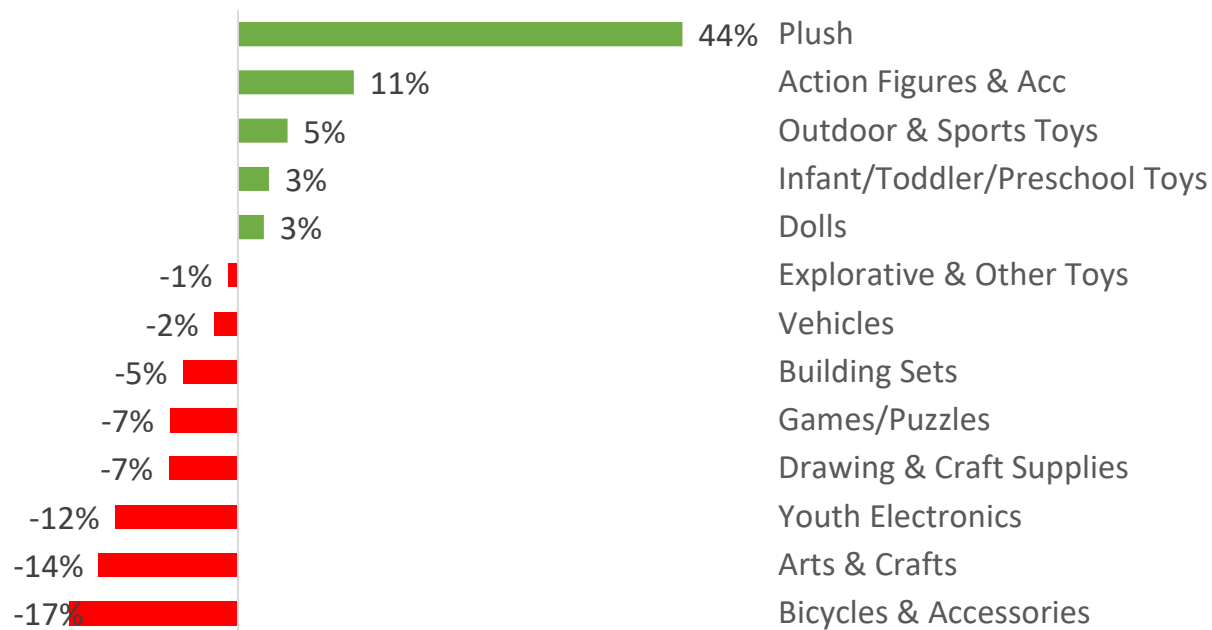
LEGO remained as the leading manufacturer in June but lost 5 share points vs. same month last year. Mattel was the largest absolute dollar gainer for the second month in a row and gained 2 share points vs. same period last year. Banter Toys was the second largest absolute dollar gainer for July (Squishmallows contributed to most of the gains). For the latest month, Barbie was the leading property, followed by Star Wars and Pokémon. Jurassic World had the largest gains dollar gains for the month (+\$11M) followed by Pokémon (+\$3.4M).



Category Trends

For the latest YTD, 5 supercategories grew. Plush had the largest growth where Traditional Plush grew +45%, mainly driven by Squishmallows and Interactive Plush grew +42% boosted by Magic Mixies. Action Figures recorded strong growth from a number of properties: Jurassic World, Toy Story/Lightyear, Akedo. Games/Puzzles declining as a whole, but the only growing segment was Strategic Trading Cards +16%. July continued to record double digits decline for Building Sets. Harry Potter, National Geographic were the 2 largest dollar declining properties for Building Sets.

% Value Change YTD



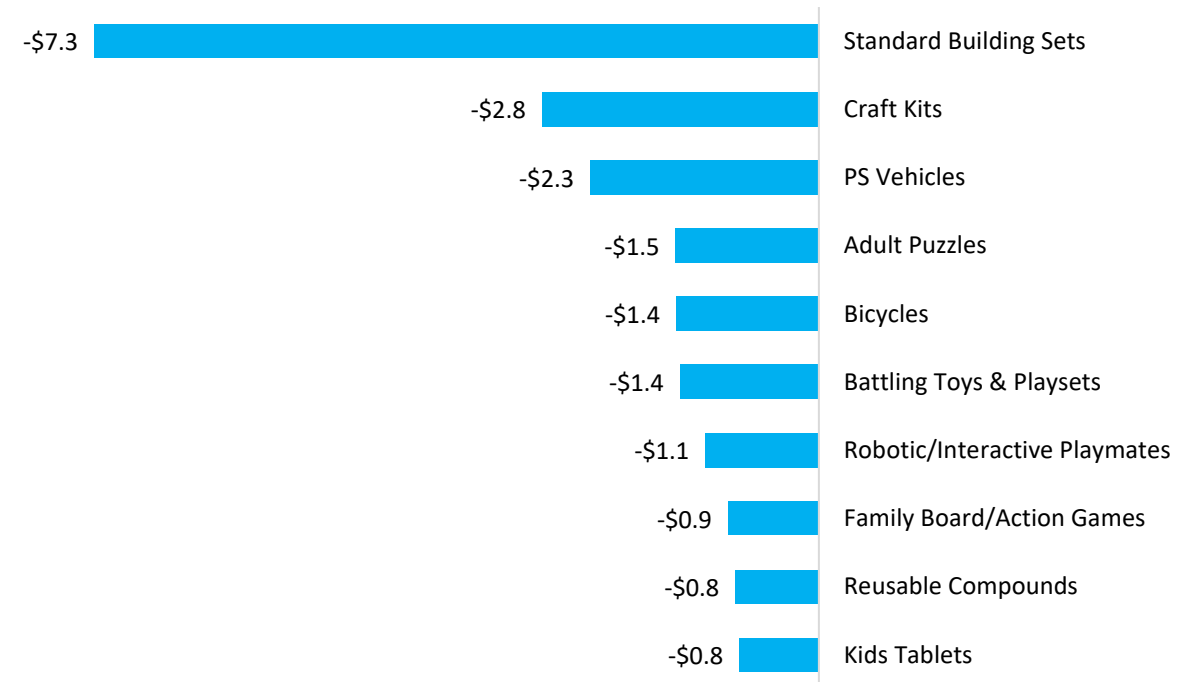
Subclass Trends

Plush continued to dominate, added +\$13M where Squishmallows drove Traditional Plush and Magic Mixies drove Interactive Plush. Within Action Figs, Jurassic World continued to dominate in July, being the largest property for the second month in a row in Action Figs. This is followed by Transformers being the second most popular property in July. On the flip side, Standard Building Sets experienced strong decline driven by weak sales from Harry Potter in July

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



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



Property Trends

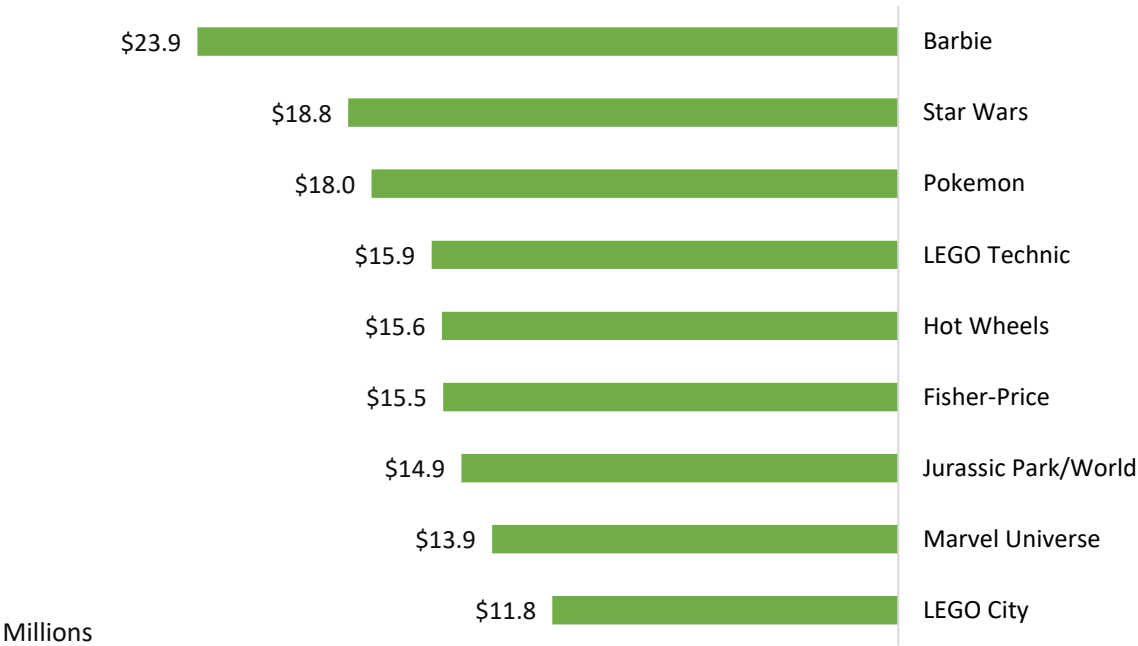
Top 5 new properties Jul'22 vs. Jul'21

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

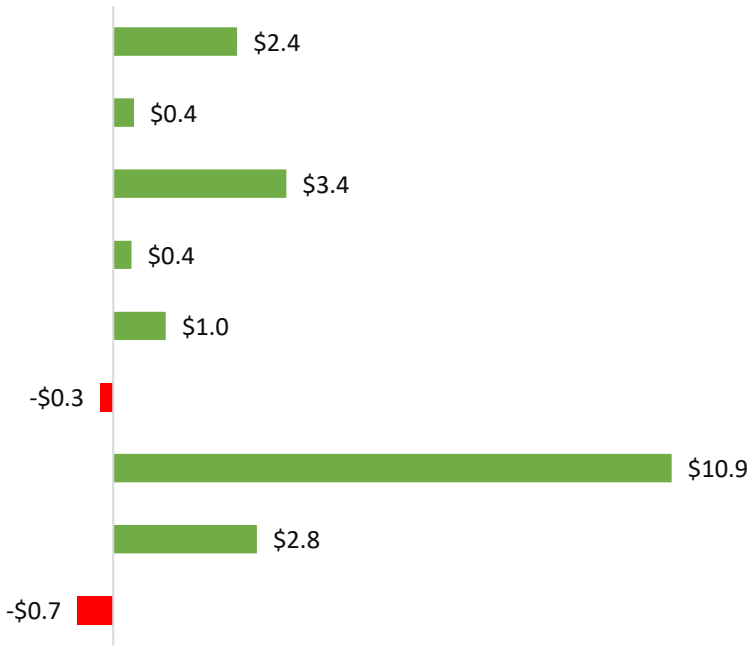
Top 5 dollar gaining properties Jul'22 vs. Jul'21

- #1 – Jurassic Park/World
- #2 – Pokemon
- #3 – Squishmallows
- #4 – Toy Story/Lightyear
- #5 – LEGO Jurassic Park/World

Top 10 Properties YTD



\$ Value Change vs YAG



For more information

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