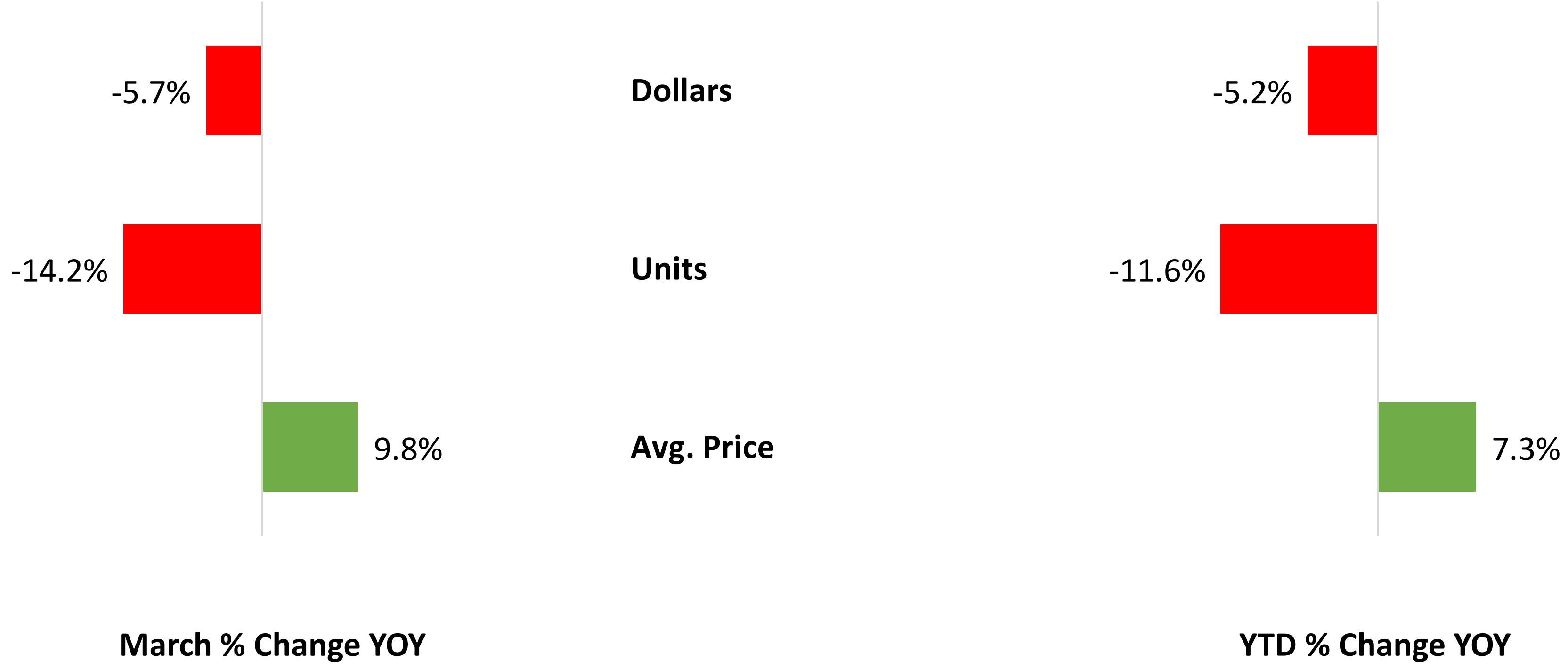
March 2022

ATA Report

Australia Toy Association

Industry Trends

Australian toy market declined -6% YoY. Unit sales were -14% below 2021 and Average Price grew +10%. March results were negatively impacted by the timing of Easter moving from March 21 to April 22. In the latest month, 2 supercategories were in growth vs March 2021: Plush +24% and Outdoor Toys:+1%. Globally*, 8 countries posted a decline for the month, but all except for the UK are up on the first quarter 2020.



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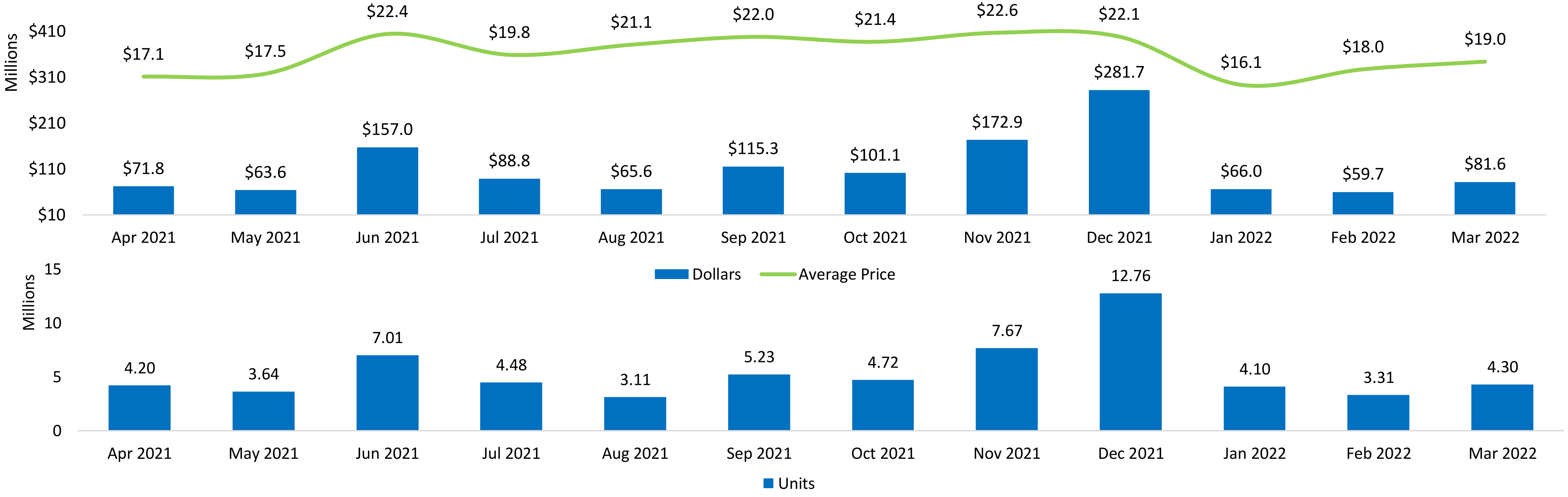
Monthly Trend

Unit sales were -14% down vs March 2021 .Only Plush recorded growth in unit sales compared to same time last year. Collectively Arts &Crafts and Drawing & Craft Supplies accounted for 32% of losses in volume sales. Average Price grew +10% in the latest month where 12/13 categories recorded growth, only Plush remained flat compared to same month last year. Price segment $30+ accounted for 51% of total toy dollars (this is 5.1 share point increase vs. same month last year).

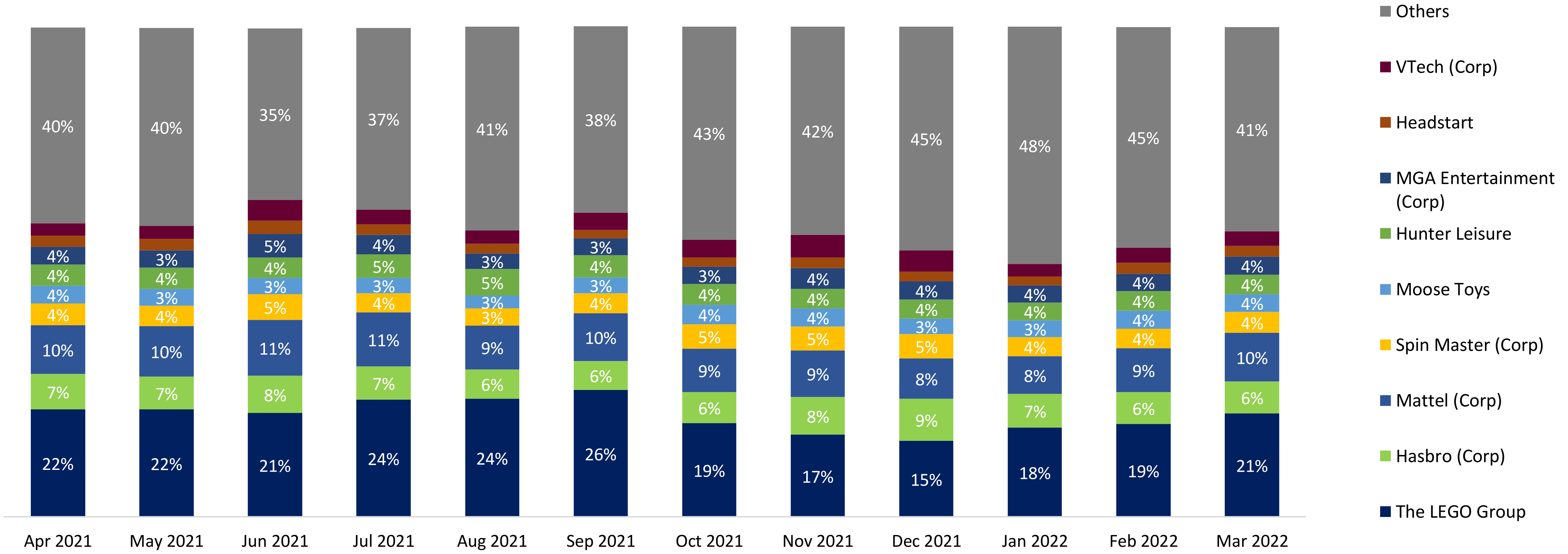
Monthly Value ($M), Average Price ($) and Units (M)



NPD Toys Australia YTD March 2022

Corporate Manufacturers Trends

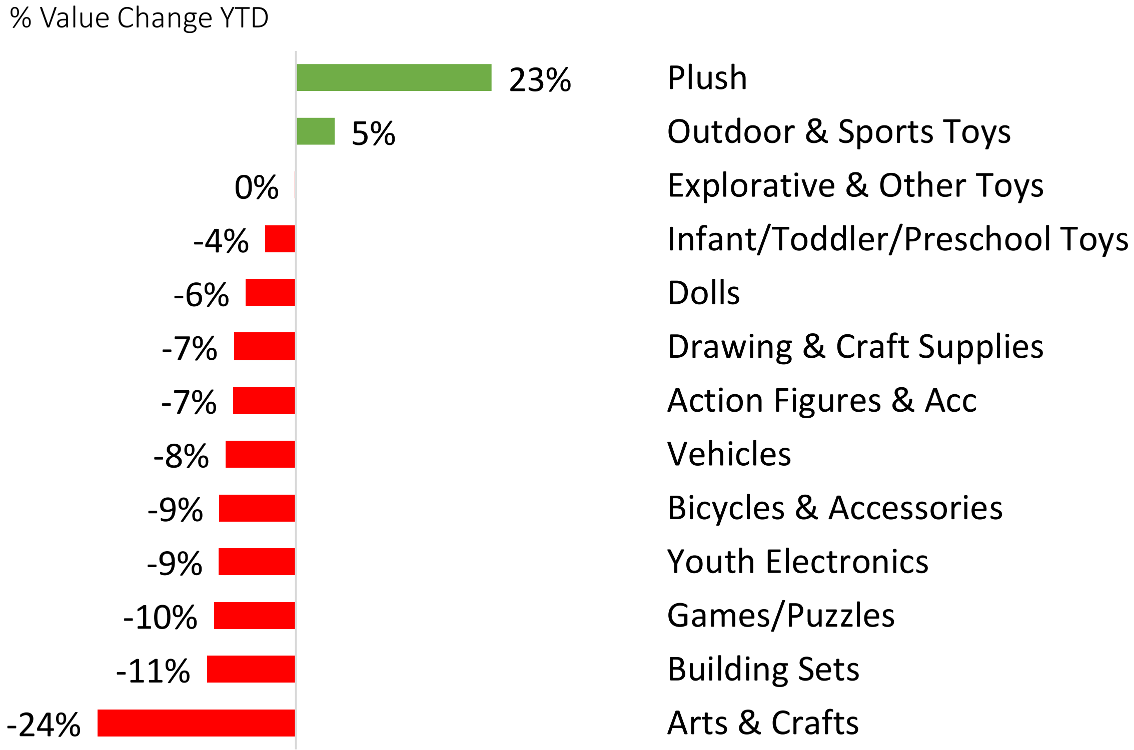
In March, The LEGO Group kept its position to #1 with 21% share followed by Mattel with 10% share and Hasbro with 6% share. Some notable performances for the latest month were:- Banter Toys (+17%) had the largest absolute dollar gains, followed by MerchSource (+77%) and Vtech (+11%). Licensed toys accounted for $28 M of the overall toy sales and contributed 35% to total toy dollars (this is 1 share point increase vs same month last year).LEGO Technic was the #1 property by absolute dollars and McLaren recorded largest absolute dollar gains in the latest month.



NPD Toys Australia YTD March 2022

Category Trends

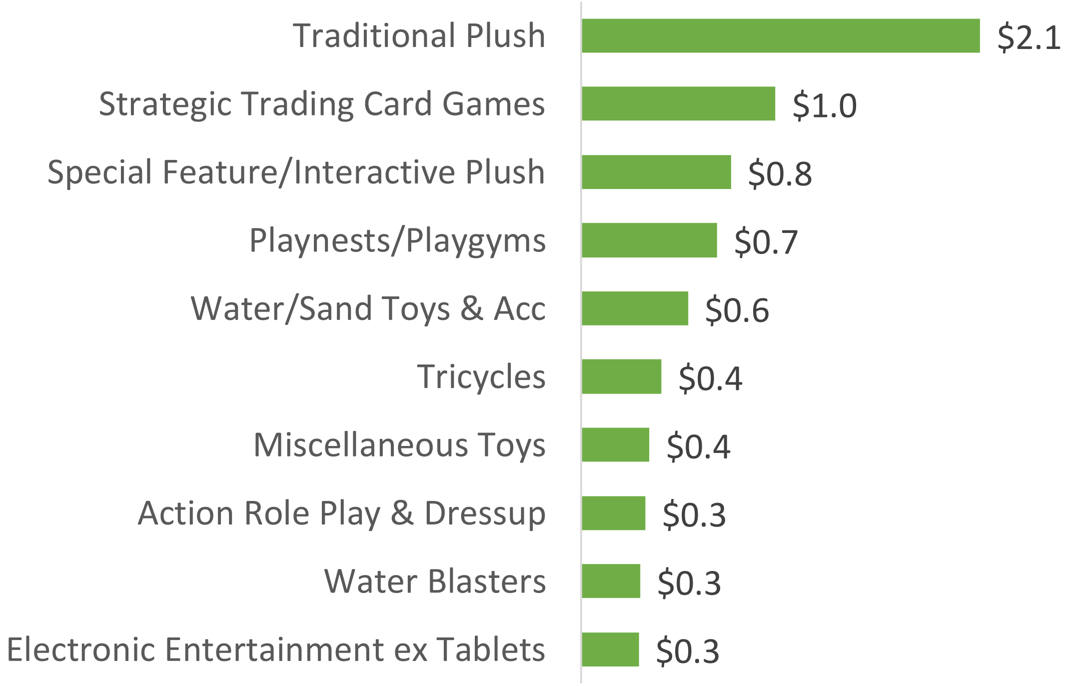
Only 2 super categories out of 13 increased sales for the first quarter. Plush grew +23% ,properties like: Squishmallows, Magic Mixies and Pokémon contributed 58% to overall dollar gains within this category. Outdoor & Sports Toys grew +5%, Nerf, Little Tikes and Paw Patrol contributed 31% to total dollar gains within Outdoor Toys. On the flip side, Building Sets and Arts and Crafts contributed 47% of losses in the first quarter.



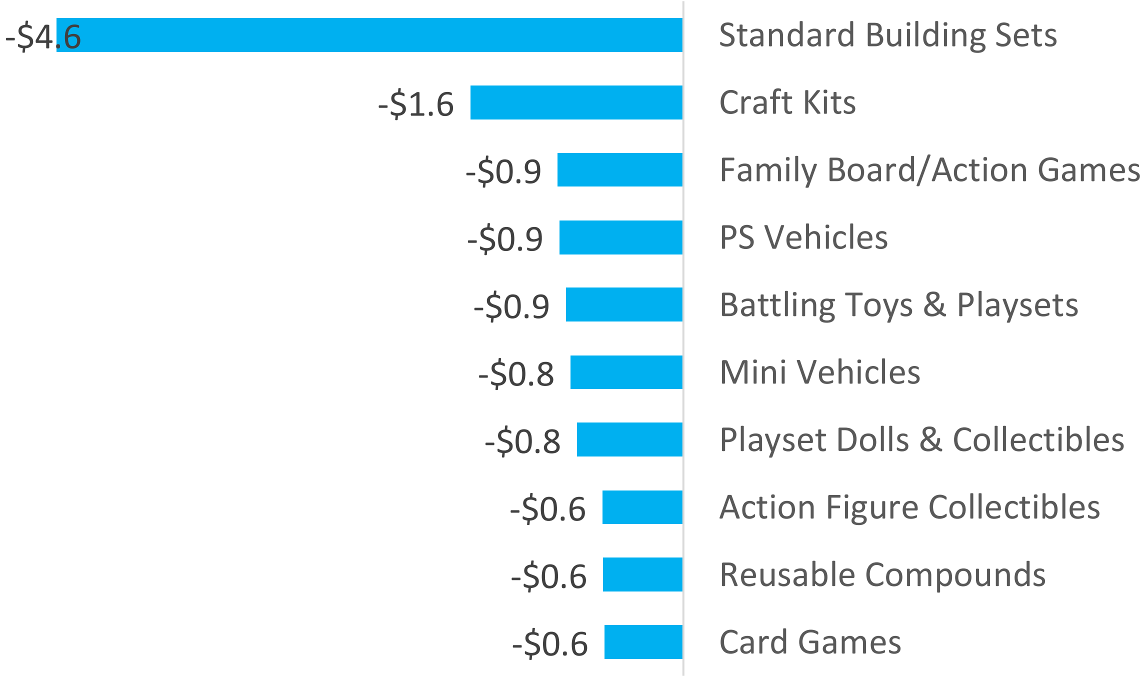
Subclass Trends

3 out of top 10 fastest gaining subclasses were from Outdoor & Sports Toys: Water/Sand Toys & acc(+14%), Tricycles(+92%) and Water Blasters(+61%). Tradition Plush(+22%) remained the top dollar gaining subclass followed by Strategic Trading Card Games(+25%) and Special Feature/Interactive Plush(+29%). Collectively these three subclasses accounted for over 40% of all the gaining subclasses in the latest quarter. On the flip side, Standard Building Sets, Craft Kits and Family Boar/Action Games accounted for 34% of all declining subclasses.

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



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



Property Trends

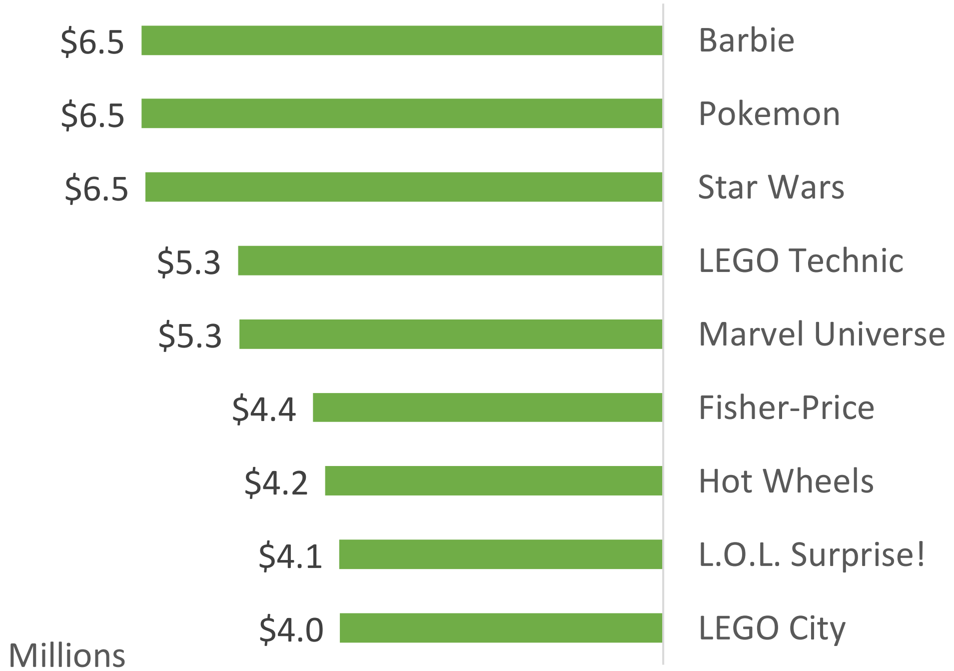
Top 5 new properties March'2022 vs. March'2021

#1– Magic Mixies
#2– Disney Encanto
#3 – Akedo
#4 – Recyclings
#5 – Disney Hooyay

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

#1 – McLaren
#2 – Squishmallows
#3 – Marvel Universe
#4 – Magic Mixies
#5 – LEGO Batman

Top 10 Properties YTD



$ Value Change vs YAG

NPD Toys Australia YTD March 2022

For more information

Contact The NPD Group at 866-444-1411 or email contactnpd@npd.com, or your account representative below.

Amelia Eng
Senior Account Manager
Amelia.Eng@npd.com
+61 418 500 547

Surbhi Malhotra
Account Manager
Surbhi.Malhotra@npd.com
+61 428 105 855

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