

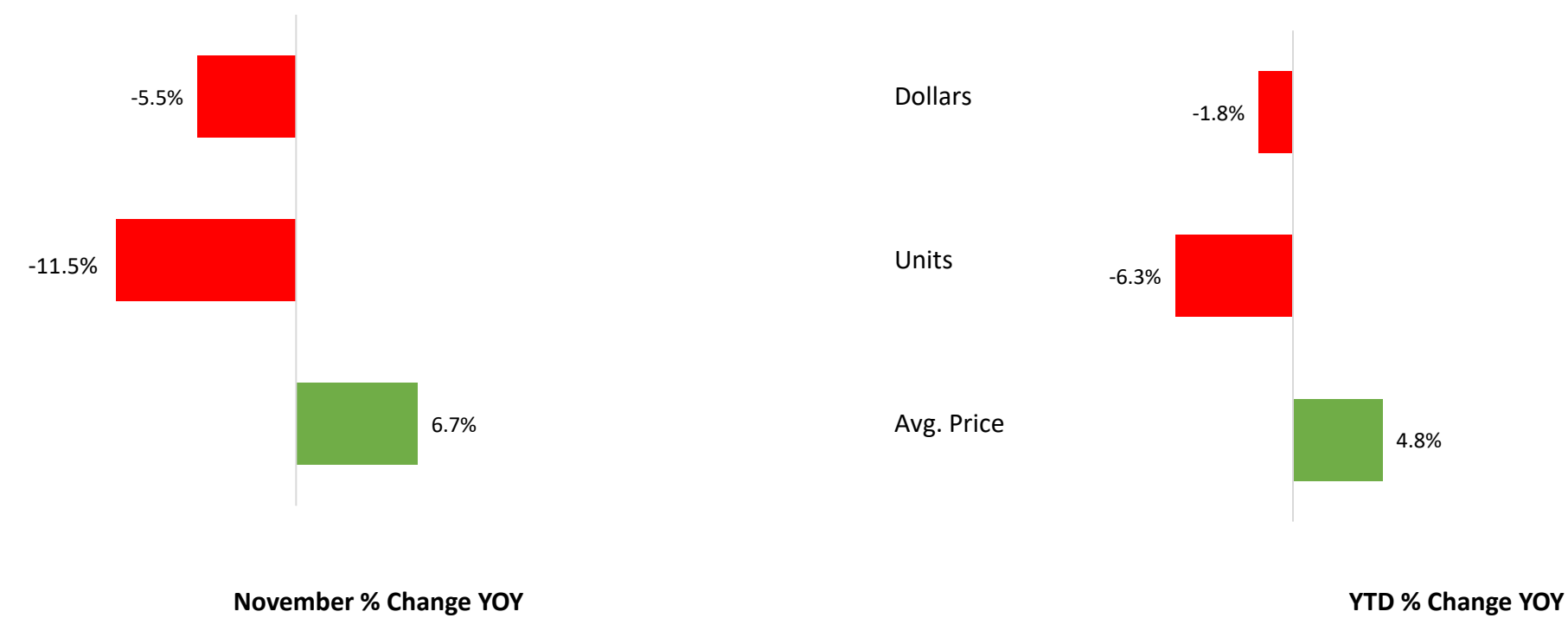
Nov 2022

ATA Report

Australia Toy Association

Industry Trends

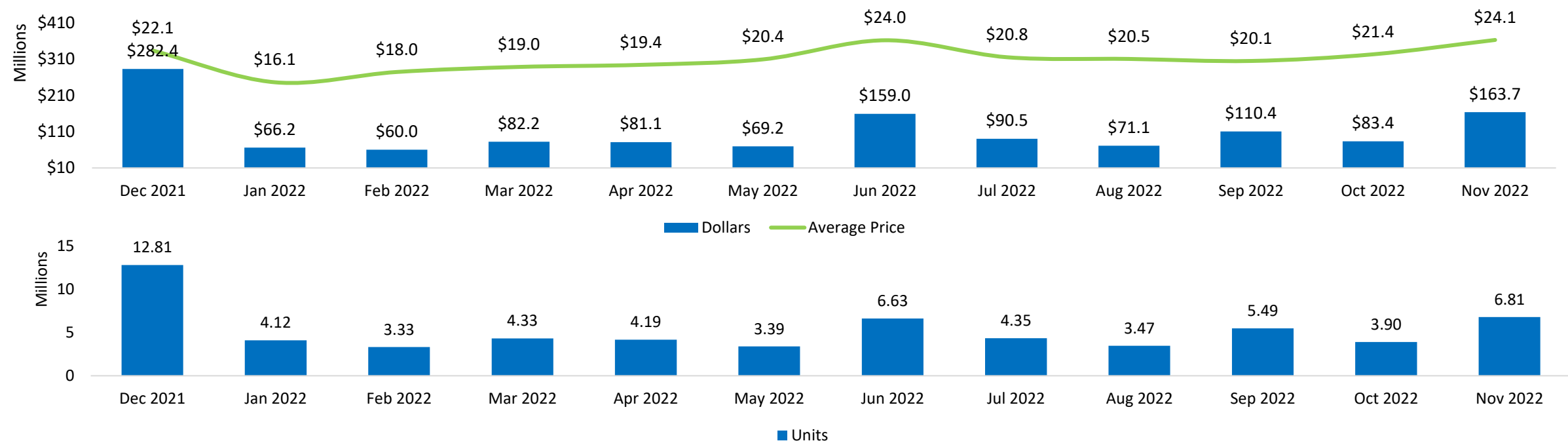
November experienced a -5% drop in total dollars vs. 2021. Compared to pre-covid 2019, November 2022 grew 9%. Average price increased by 7% in the latest month (\$24.05). Plush (18%) and Vehicles (7%) were the 2 categories that grew for the month meanwhile Dolls (-14%), Building Sets (-7%), Action Figures (-14%) had the largest dollar drop for the month. For YTD, total dollars dropped by -2% which continued to be driven by Building Sets (-\$16.8M), this is in-line with global result which dropped -2%.



Monthly Trend

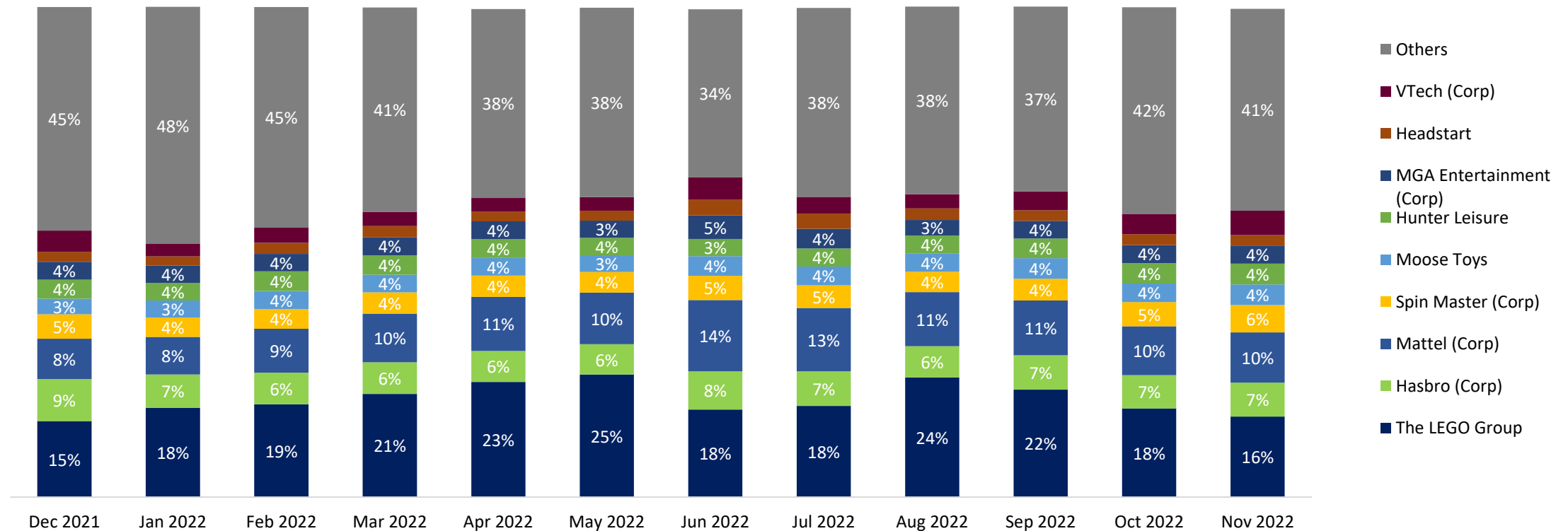
Building Sets was the largest dollar supercategory followed by Outdoor & Sports Toys, Infant/toddler/Preschool, Dolls, Vehicles, Plush and Games/Puzzles. Drawing & Craft Supplies had the largest percentage decrease of -19%, however the largest dollar drop came from Dolls (-\$3.2M). November 2021 average price was \$22.53 and now increased to \$24.05 driven from both licensed toys and unlicensed toys.

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



Corporate Manufacturers Trends

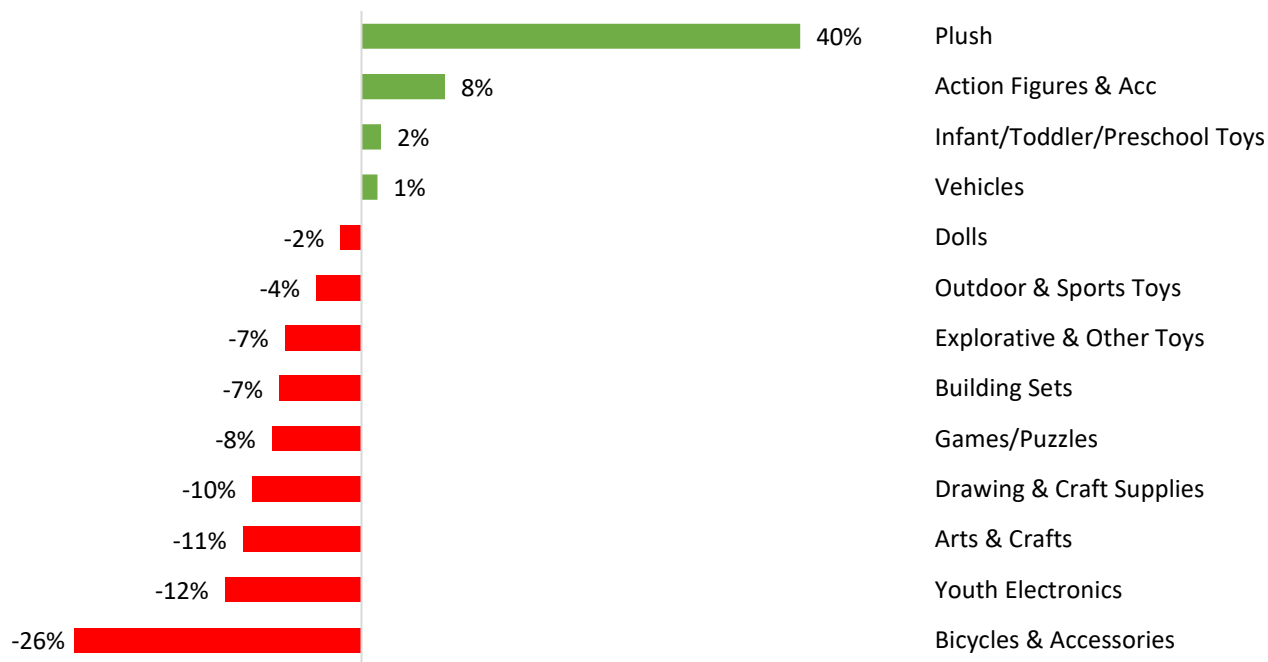
LEGO is the leading dollar manufacturer in November 2022 but had a decline of -7% and dropped share by -1%. Banter Toys in November had the top dollar gain of +41% (\$2M) and gained +1% share driven by Squishmallows and Pokémon. Barbie is the leading dollar property, followed by Pokémon and Hot Wheels for the month. For YTD, the largest dollar gained properties remains to be Jurassic World followed by Squishmallows and Magic Mixies. The leading manufacturer dollar gainers for YTD is Mattel, followed by Banter Toys.



Category Trends

For the latest YTD, 4 supercategories grew in value, Plush had the largest growth of \$21.2M where traditional plush grew +46% mainly driven by Squishmallows and Interactive Plush grew +26% driven by Magic Mixies. Action figures grew +8% from several properties: Jurassic Park/World, Toy Story/Light Year and Marvel Universe. There was a +2% growth for Infant/Toddler/Preschool Toys driven by Gabby's Dollhouse and Cocomelon. Vehicles grew +1% more driven from Hot Wheels. Bicycles & Acc had the largest percentage drop of -26% were mainly driven by unlicensed. Building Sets have declined -7%, driven by Harry Potter/Fantastic Beasts.

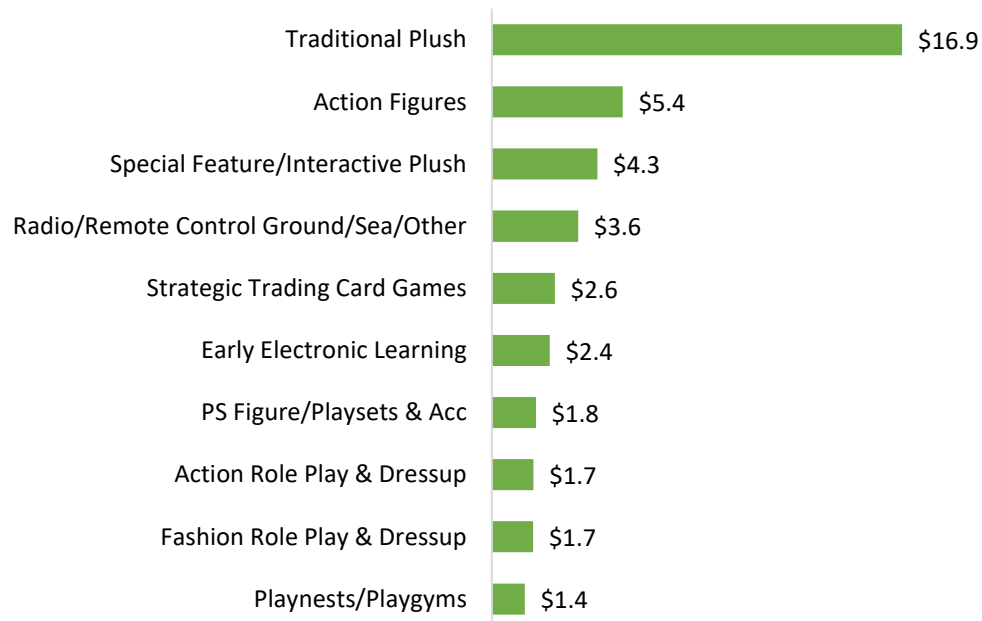
% Value Change YTD



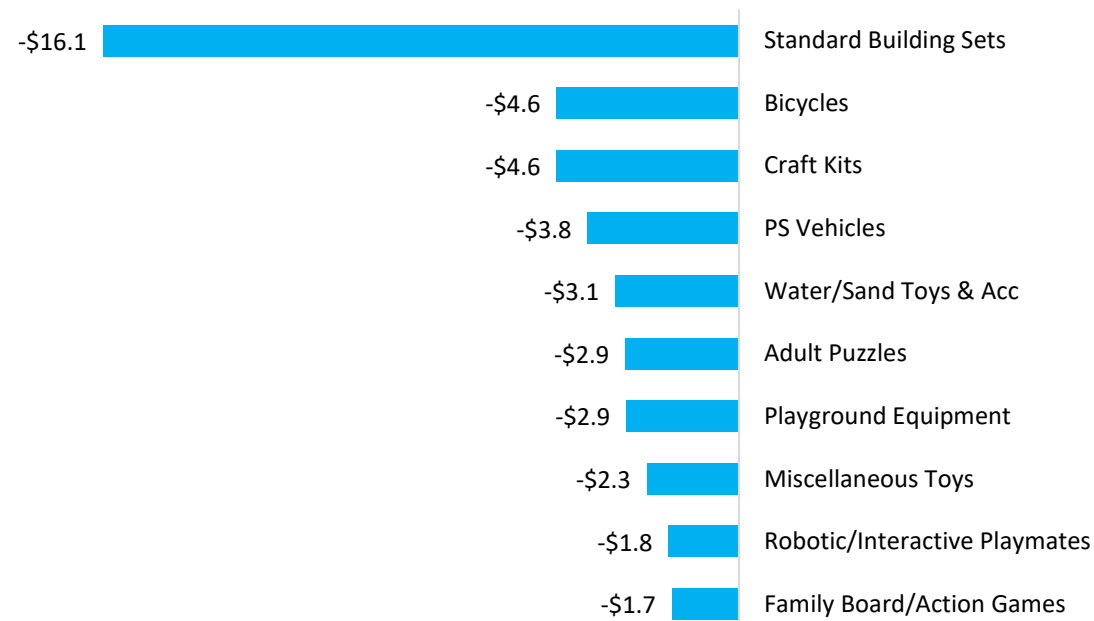
Subclass Trends

Plush continued to dominate which added \$1.8M more for this month vs. 2021, this was from traditional Plush which was the top dollar gainer driven by Squishmallows and Magic Mixies drove Interactive Plush. For Action Figures, Jurassic Park/World continued to be the top dollar contributor and top gainer for this month. Transformers was the second largest property for Action Figures but dropped -27% vs. 2021 meanwhile Toy story/Light Year was the 2nd ranked top gainer. Standard Building Sets dropped -6% for this month due to DC Universe, followed by LEGO Ideas and LEGO Harry Potter, however for YTD (-8%) continues to be declining mainly from Harry Potter/Fantastic Beasts overall.

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



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



Property Trends

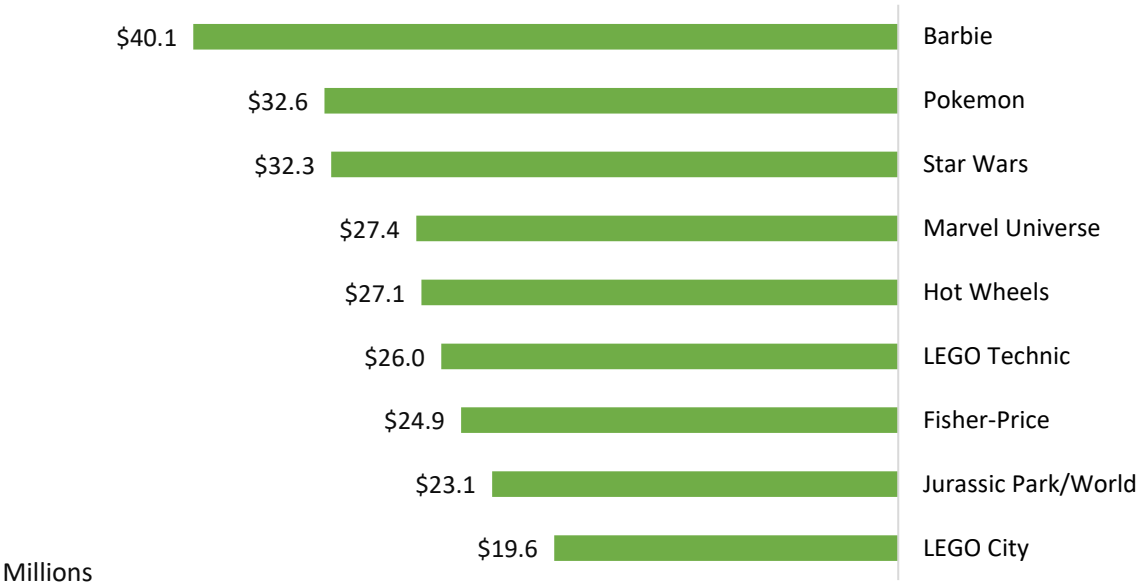
Top 5 new properties Nov'22 vs. Nov'21

- #1– Gabby’s Dollhouse
- #2 – Disney Encanto
- #3 – Avatar The Movie
- #4 – LEGO Avatar
- #5 – Mermaze Mermaidz

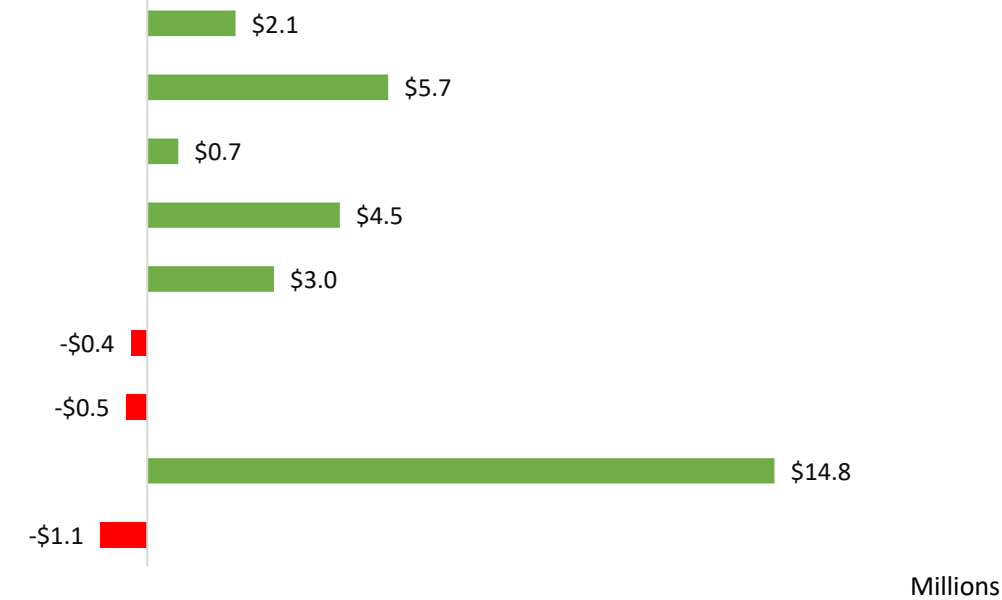
Top 5 dollar gaining properties Nov'22 vs. Nov'21

- #1 – Gabby’s Dollhouse
- #2 – Squishmallows
- #3 – Magic Mixies
- #4 – Jurassic Park/World
- #5 – Pokémon

Top 10 Properties YTD



\$ Value Change vs YAG



For more information

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