

Oct 2022

# ATA Report

Australia Toy Association

# Industry Trends

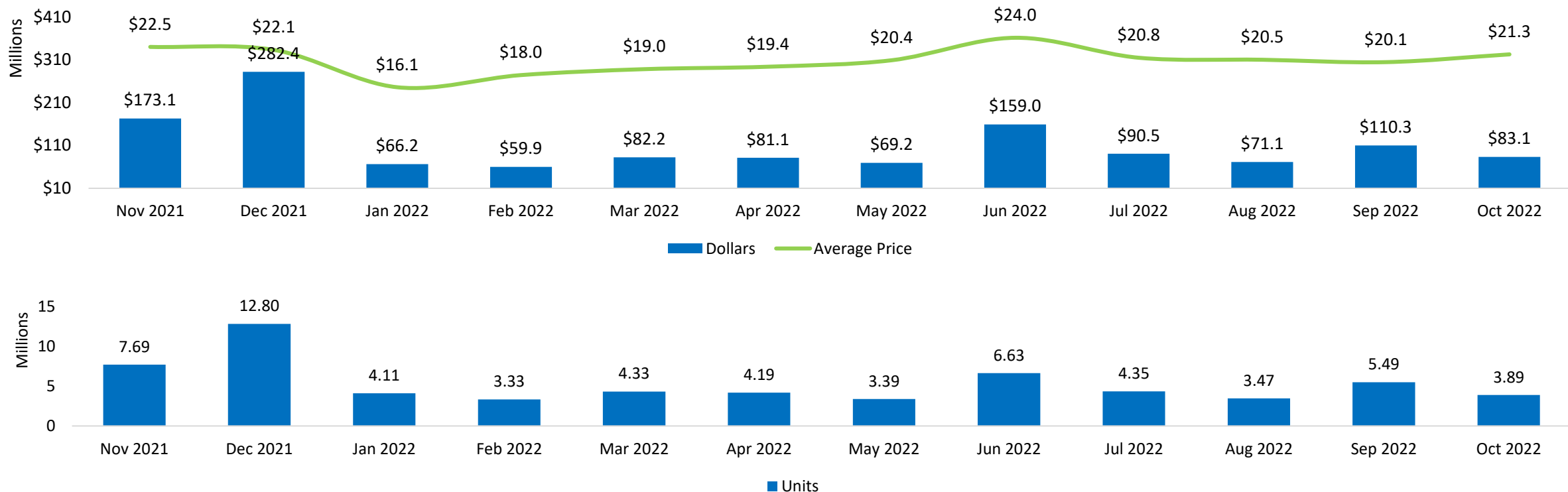
October experienced a -18% drop in total dollars vs. 2021. Compared to pre-covid 2019, October 2022 grew +5% in value. Average price slightly dropped -0.4% in the latest month (\$21.34). Plush (+11%) was the only category that grew for the month vs. 2021 meanwhile Building Sets (-21%), Outdoor & Sports Toys (-26%) and Dolls (-20%) had the largest dollar drop for the month. For YTD, total dollar sales slightly dropped by -1% driven by mainly Building Sets (\$-14.9M) meanwhile, global results remained flat.



# Monthly Trend

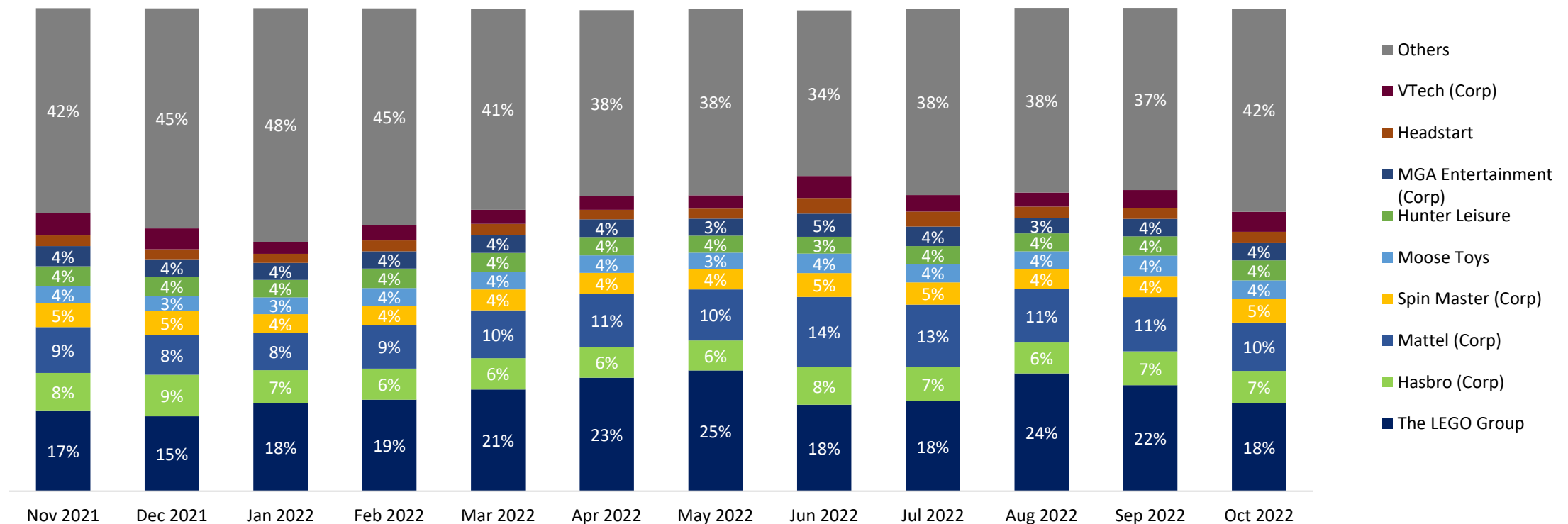
Building Sets was the largest dollar supercategory followed by Infant/Toddler/Preschool, Outdoor & Sports, Dolls, Vehicles, Games/Puzzles, Plush and Action Figures. Bicycles & Acc had the largest percentage decrease of -40%, however the largest dollar drop came from Building Sets (-\$4.2M). October 2021 average price was \$21.42 and now slightly dropped down to \$21.34 driven from unlicensed toys, meanwhile licensed toys only average price had a slight increase by +3%.

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



# Corporate Manufacturers Trends

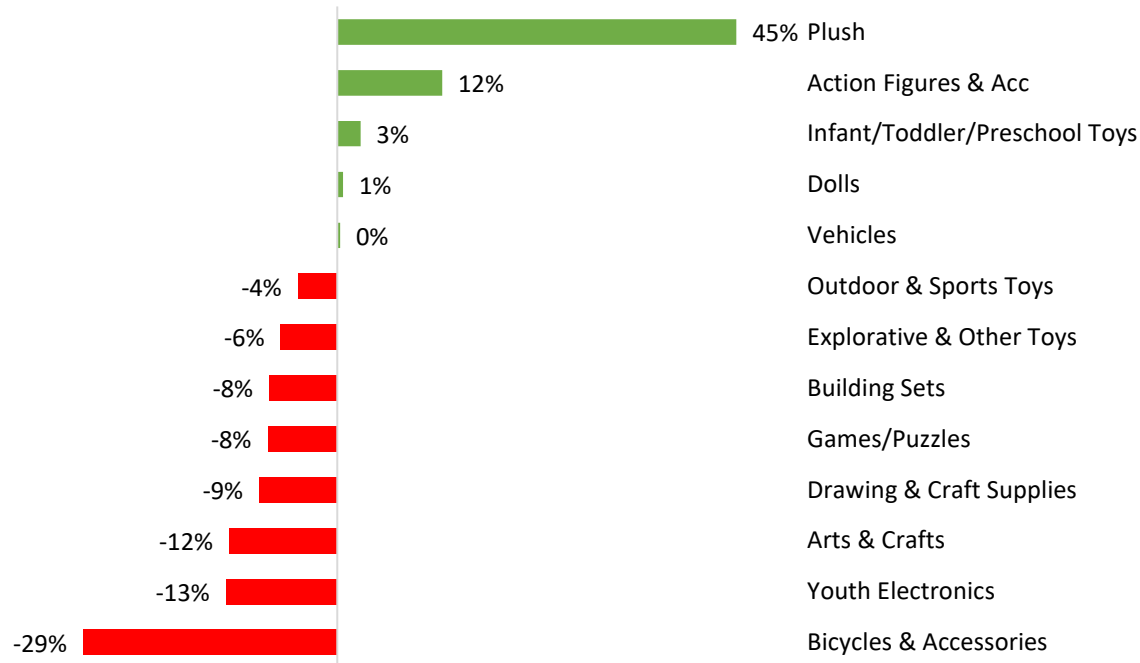
LEGO is the leading dollar manufacturer in October 2022 but had the largest dollar decline of -22% and dropped share by -1%. Within the top 10 total dollar manufacturers, only Banter Toys had dollar gains of +1% with an increase share (+1%). Pokémon was the leading dollar property, followed by Barbie and Marvel Universe for the month. For YTD, the largest dollar gained properties were Jurassic World followed by Squishmallows and Magic Mixies. Mattel (Corp) had the most dollar gain (\$10M) which was strongly driven by Jurassic Park/World.



# Category Trends

For the latest YTD, 5 supercategories grew in value, Plush had the largest growth of \$19.3M where Traditional Plush grew +51% mainly driven by Squishmallows and Interactive Plush grew +31% driven by Magic Mixies. Action Figures grew +12% from several properties: Jurassic Park/World, Toy Story/Light Year and Marvel Universe. There was +3% growth for infant/Toddler/Preschool Toys driven by Cocomelon and Gabby's Dollhouse. Building sets have further declined to -8% driven by Harry Potter/Fantastic Beasts which dropped -30% vs. YTD 2021 in value.

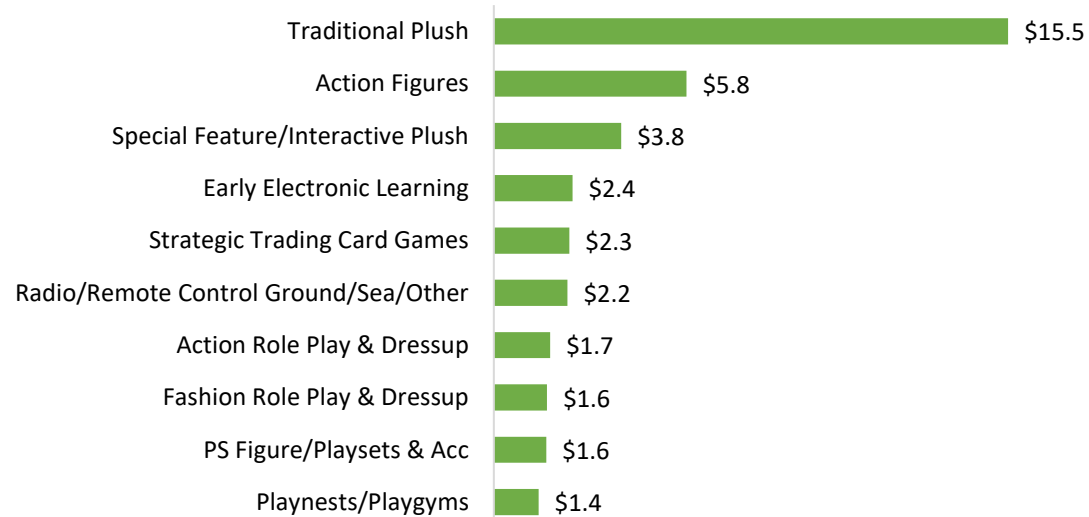
% Value Change YTD



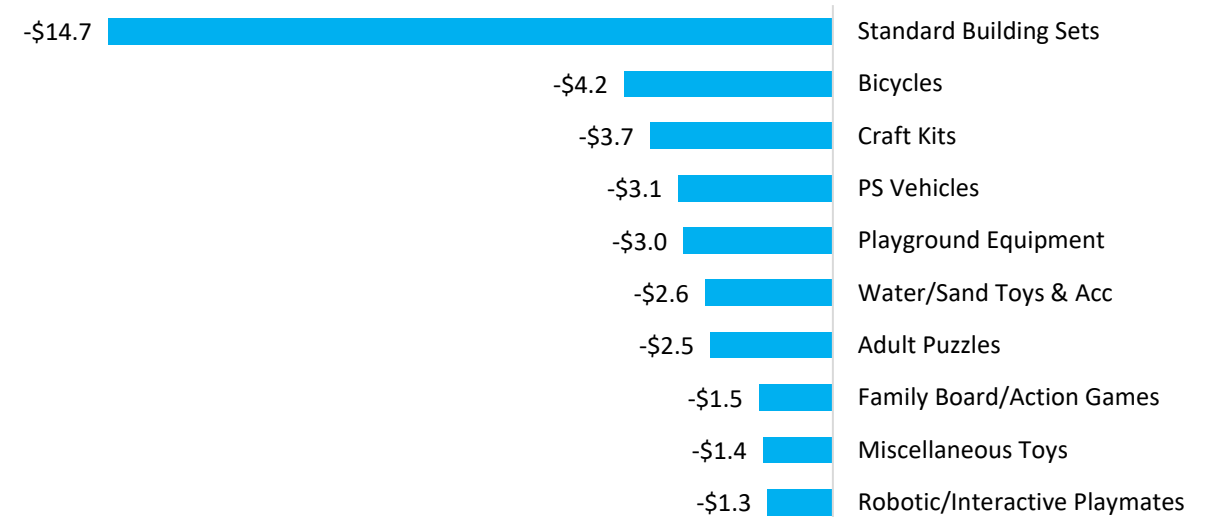
# Subclass Trends

Plush continued to dominate which added \$618K more for this month vs. 2021, Traditional plush was the top dollar contributor driven by Squishmallows and Magic Mixies drove Interactive Plush. For Action Figures, Jurassic World continued to be the leading dollar property and top gainer for this month. Transformers was the second largest property for Action Figures but dropped -32% vs. 2021 meanwhile Toy Story/Light year was the second ranked top gainer. On the declining side YTD, Standard Building Sets (-8%) further continue to experience strong decline driven by weak sales from Harry Potter/Fantastic Beasts.

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



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



# Property Trends

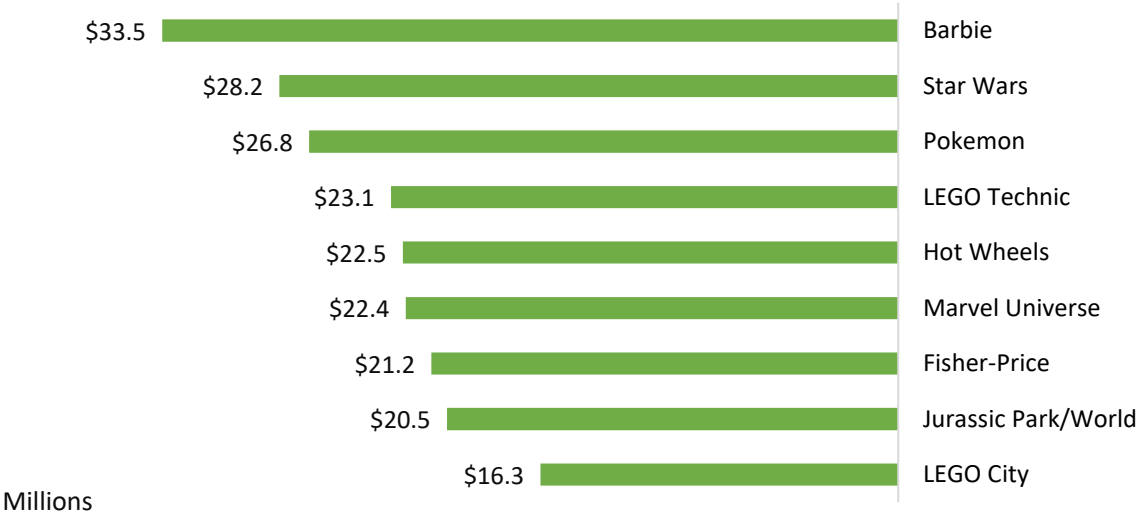
## Top 5 new properties Oct'22 vs. Oct'21

- #1– Gabby’s Dollhouse
- #2 – LEGO Avatar
- #3 – Disney Encanto
- #4 – Tony Hawk
- #5 – Octonauts

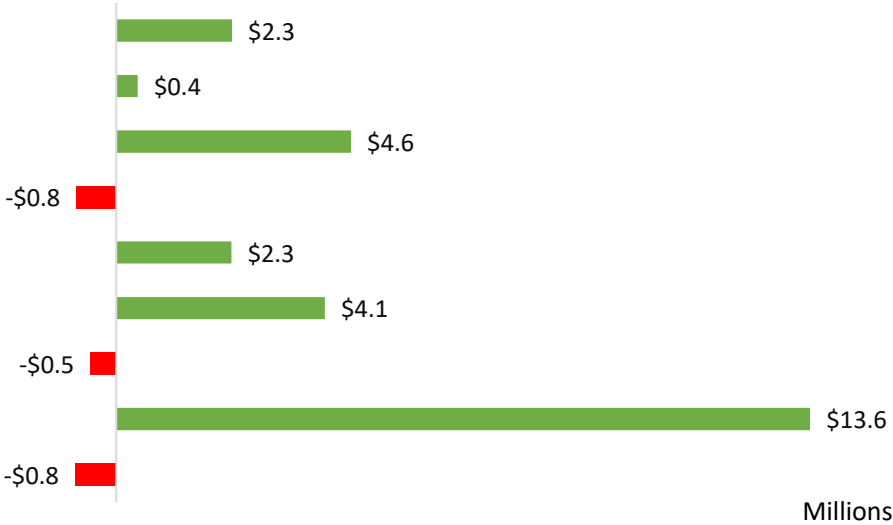
## Top 5 dollar gaining properties Oct'22 vs. Oct'21

- #1 – Squishmallows
- #2 – Jurassic Park/World
- #3 – Gabby’s Dollhouse
- #4 – Toy Story/Light Year
- #5 – Avatar The Movie

### Top 10 Properties YTD



### \$ Value Change vs YAG





## For more information

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