

ATA Report

Aug 2023

Australia Toy Association



Industry Trends

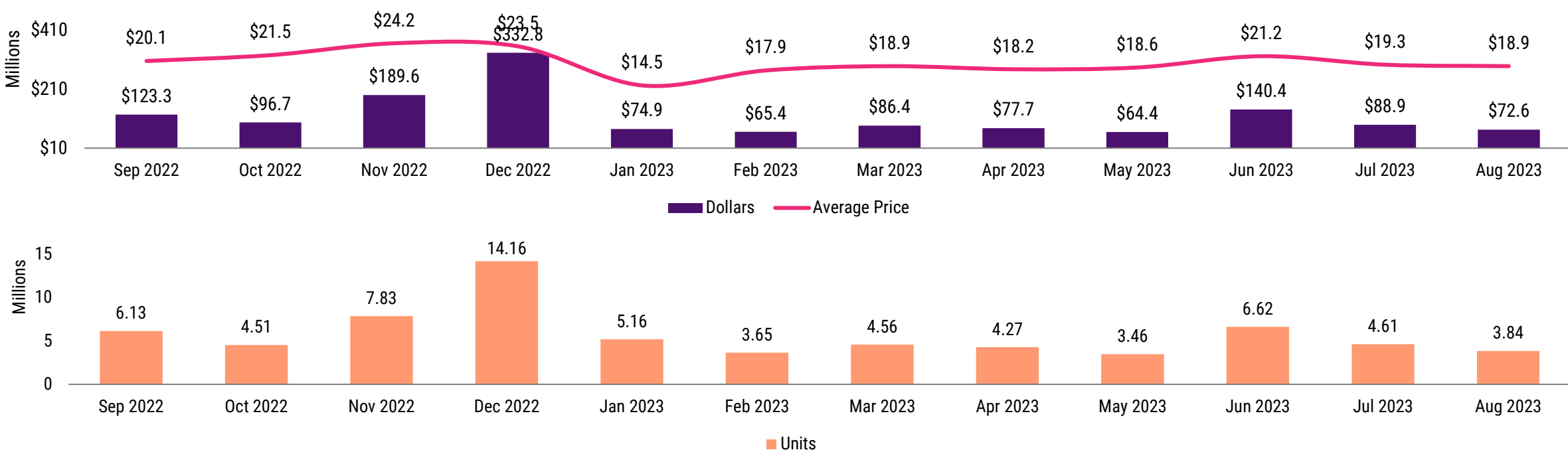
August 2023 experienced a -15% decline vs. YGO for dollars, units declined -6% and average price declined by -9% (\$18.93). Only 1 supercategory grew this month which was Youth Electronics (+3%), meanwhile the 3 largest decliners were Building Sets (-28%), Infant/Toddler/Preschool Toys (-21%), Outdoor & Sports Toys (-17%). For YTD August, total dollars declined -12% (Global declined -6%) and the largest category drop continues to be Building Sets (-18%).



Monthly Trend

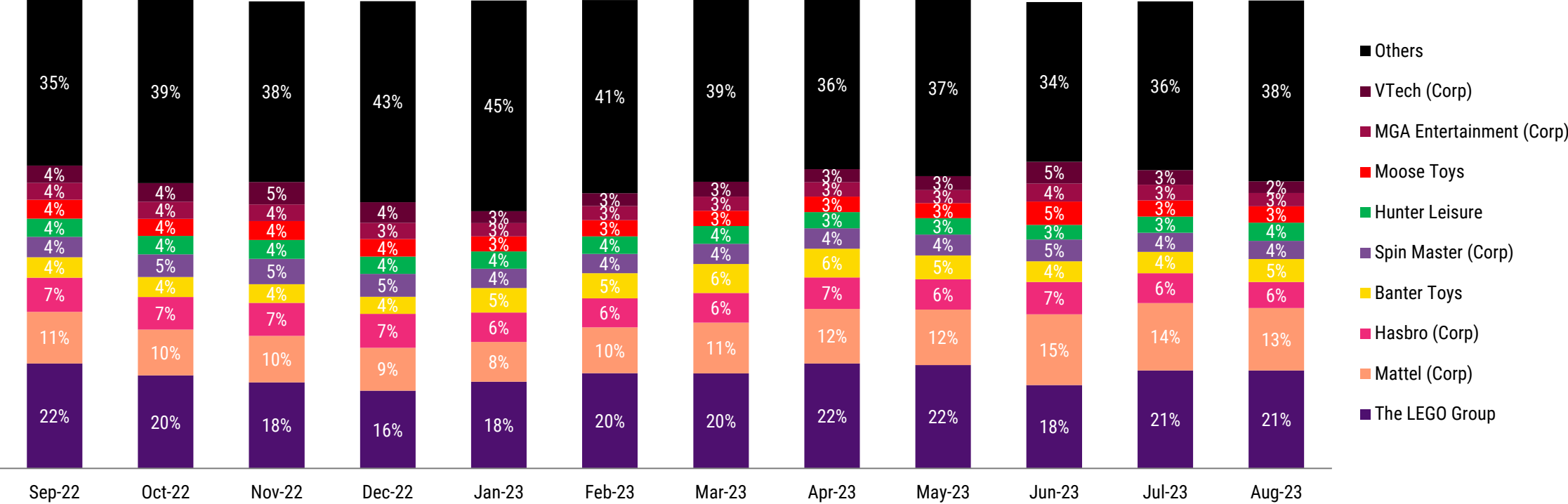
For August 2023, Building Sets is the largest dollar made category but was also the largest decliner of -28%. The next largest dollar made categories are Infant/Toddler/Preschool Toys (-21%), Dolls (-3%), Outdoor & Sport Toys (-17%), Games/Puzzles (-10%) and Vehicles (flat). Average price was \$20.86 in 2022 August and declined to \$18.93 in 2023, driven from both licensed and unlicensed toys.

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



Corporate Manufacturers Trends

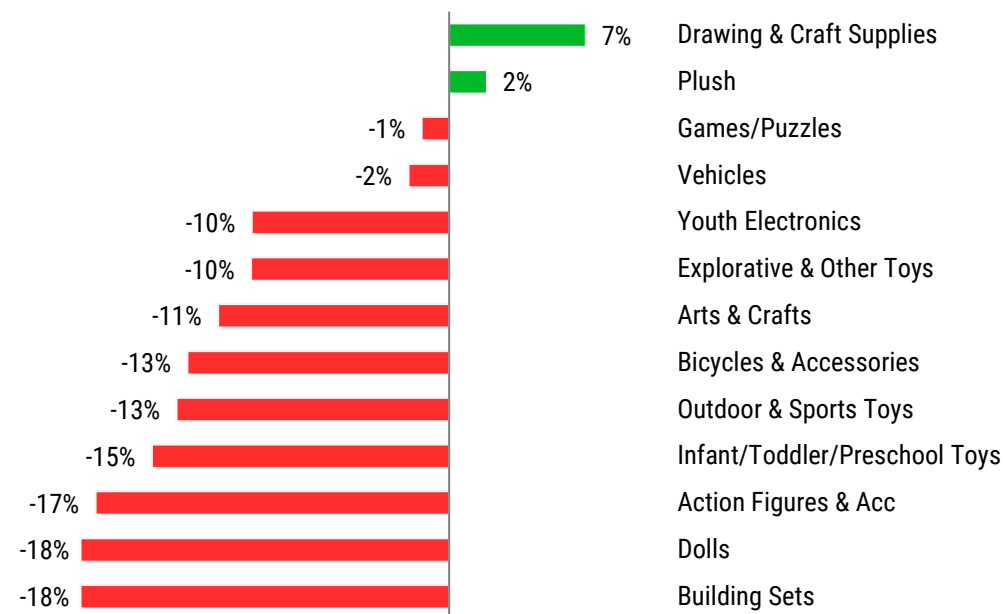
For August 2023, LEGO is the leading dollar made manufacturer however Zuru had the largest dollar growth which grew 1 share point, followed by Mattel and Bandai. Barbie is the leading dollar property, followed by Star Wars and Pokémon. For YTD August, the largest dollar gaining properties continues to be Pokémon, followed by Squishmallows and Hot Wheels. The top 3 dollar gaining manufacturers for YTD August are Banter Toys, Zuru and Newell Brands.



Category Trends

For YTD August 2023 vs. YGO, 2 supercategories grew which are Drawing & Craft Supplies (+7%) from Markers and Plush grew 2% driven from Squishmallows, Pokémon and Rainbocorns. Youth Electronics was in decline for YTD August 2023, however, was the only growing category for this month +3%, particularly Robotic/Interactive Playmates (+14%) subclass driven from Robo Alive and Bitzee. For YTD August 2023, Building Sets continue to drop -18% driven from LEGO Technic, LEGO Ideas, Jurassic Park/World and Harry Potter/Fantastic Beast.

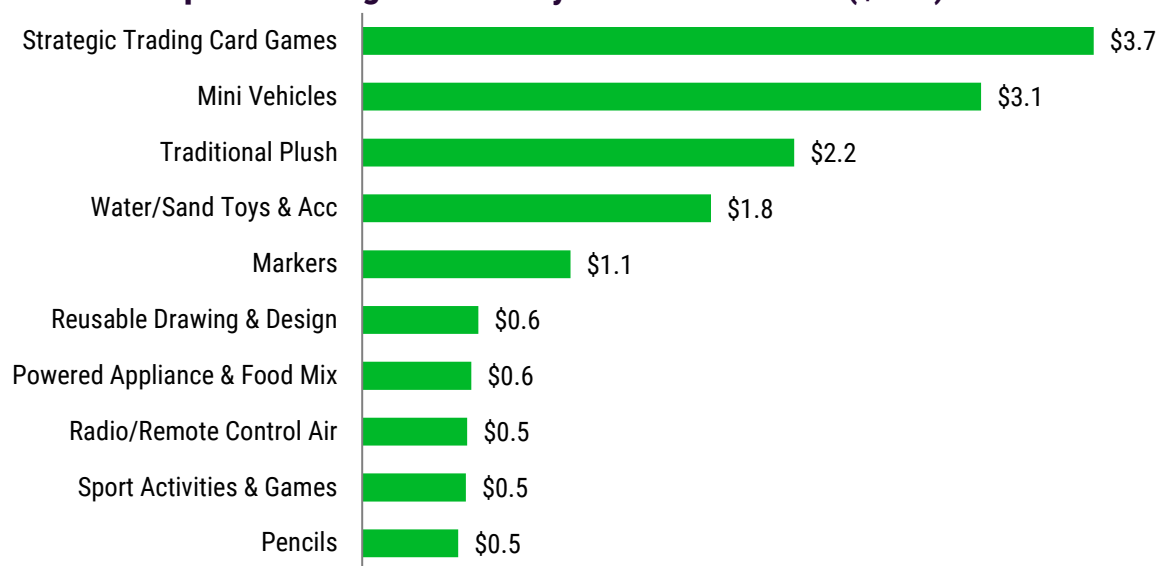
% Value Change YTD



Subclass Trends

Youth Electronic was the only category which grew this month vs. YGO, where Robotic/Interactive Playmate grew +14% driven from Robo Alive and Bitzee, however while Vehicles category remains flat, subclass Mini Vehicles (+19%) remains the #1 top subclass dollar gainer driven from predominately Hot Wheels, followed by Fashion Accessories (+21%) driven by Barbie and Traditional Plush (+7%) driven by Squishmallows. Standard Building Sets (-28%) continues to drop this month from LEGO Star Wars, LEGO Technic and Harry Potter.

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



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



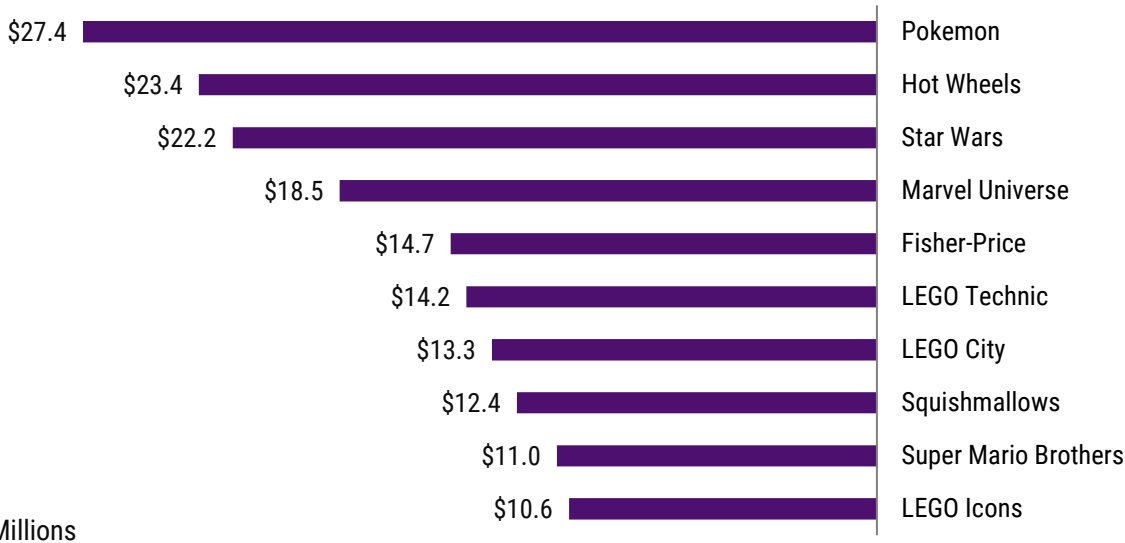
Property Trends

Top 5 new properties August'23

- #1 – LEGO DREAMZzz
- #2 – Bitzee
- #3 – LEGO Indiana Jones
- #4 – Cookeez Makery
- #5 – Poppy Playtime

New: Property sold \$0 FY 2022

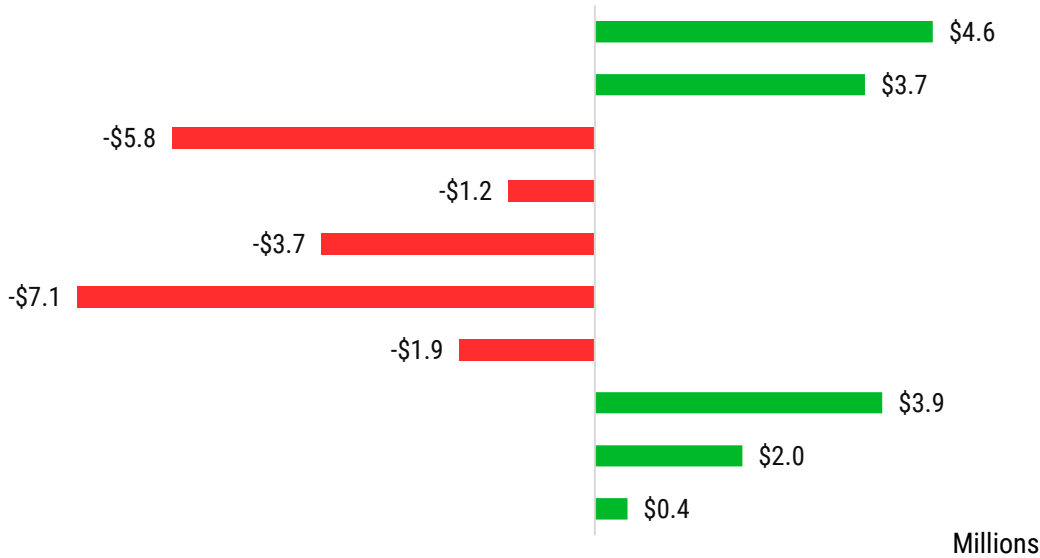
Top 10 Properties YTD



Top 5 dollar gaining properties August'23 vs. August'22

- #1 – Barbie
- #2 – Ninja Turtles (TMNT)
- #3 – Sonic The Hedgehog
- #4 – LEGO DREAMZzz
- #5 – Monster High

\$ Value Change vs YAG



For more information

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