

# ATA Report

Nov 2023

Australia Toy Association



# Industry Trends

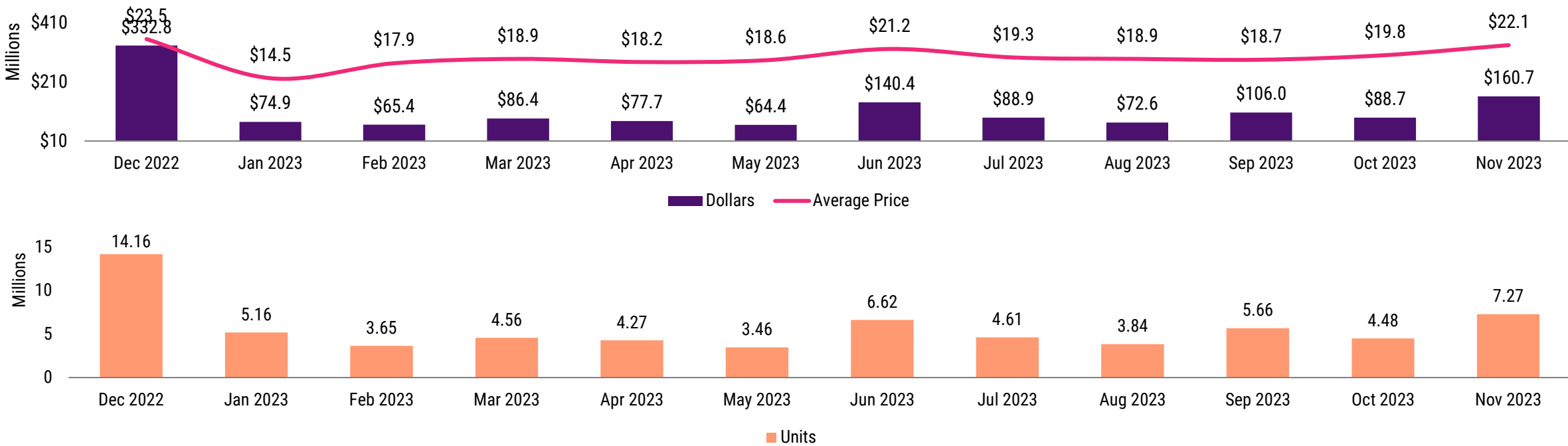
November 2023 declined -15% vs. YGO for dollars, Units declined -7% and average price declined -9% (\$22.10). All supercategories declined this month, while Youth Electronics (-5%) was the least decliner. The largest 3 decliners were Outdoor & Sports Toys (-22%), Dolls (-18%) and Infant/Toddler/Preschools (-14%). For YTD November total dollars declined -12% (Global declined -8%) and the largest category drop continues to be Building Sets (-16%), followed by Dolls (-17%) and Infant/Toddler/Preschool Toys (-15%)



# Monthly Trend

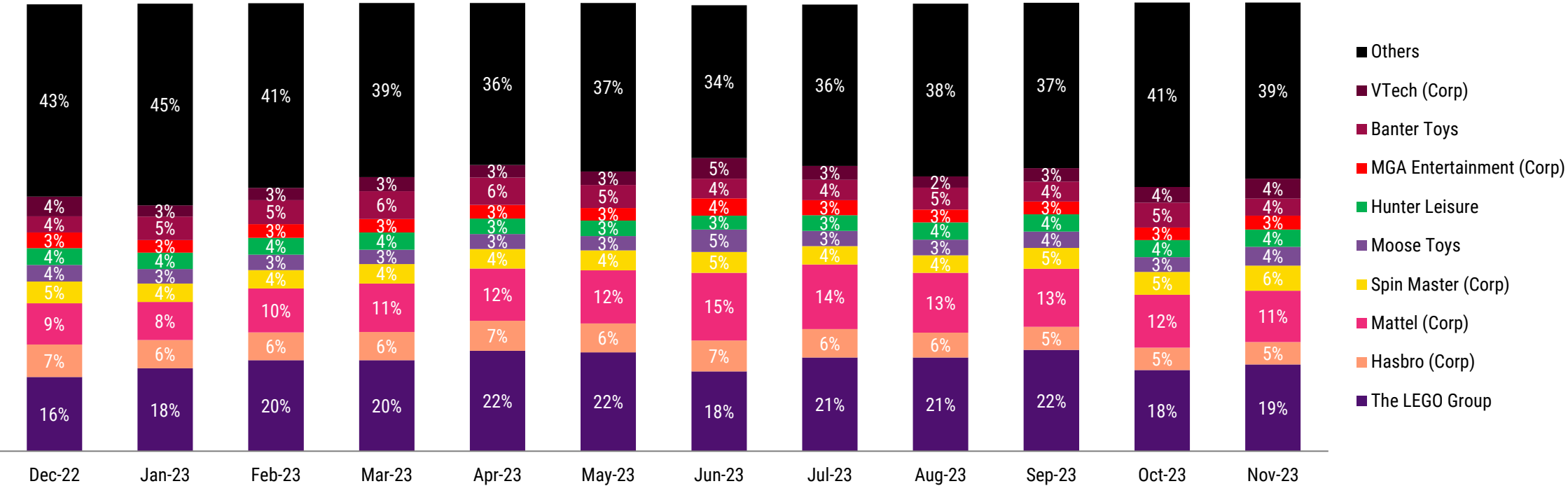
For November 2023, Building Sets continues to be the largest dollar made category and was the 4th largest decliner by -10%. The next largest dollar made categories after Building Sets are Infant/Toddler/Preschool Toys (-14%), Outdoor & Sports Toys (-22%), Dolls (-18%), Vehicles (-17%) and Games/Puzzles (-16%). Average Price was \$24.20 in November 2022 and declined -9% to \$22.10 in 2023 driven from both licensed (-14%) and unlicensed toys (-6%).

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



# Corporate Manufacturers Trends

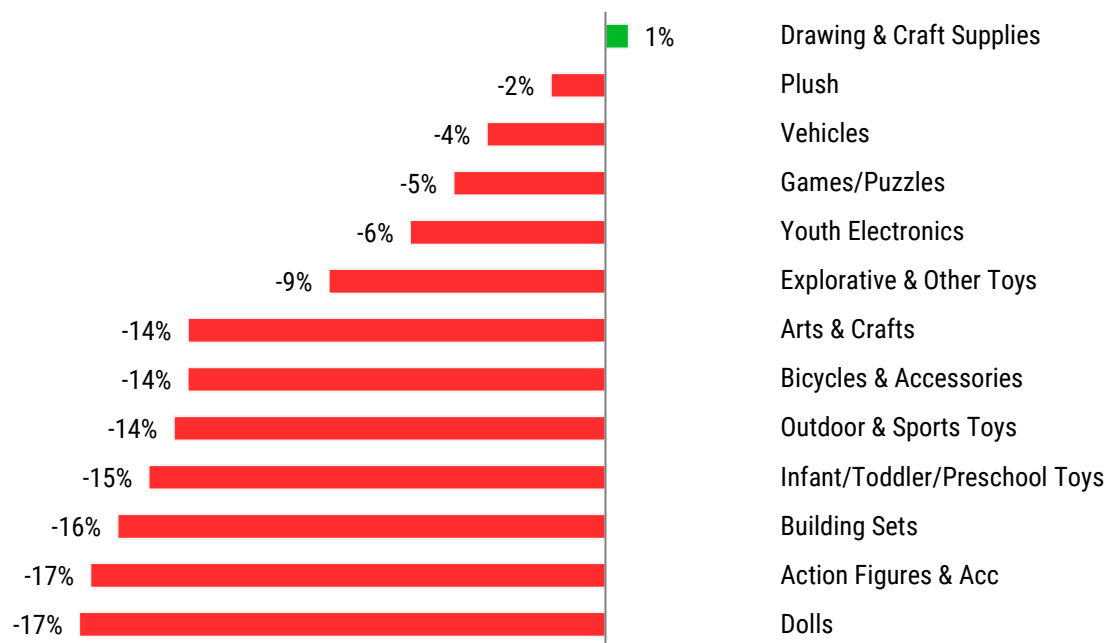
LEGO is the leading dollar manufacturer for November 2023 and was the 2<sup>nd</sup> most dollar drop, however gained 1 share point vs. YGO. Zuru had the largest dollar growth which grew 1 share point vs. YGO, followed by Battat and Bandai. Barbie is the leading dollar property for November 2023, followed by Pokémon and Star Wars. For YTD November 2023, the largest dollar gaining properties are Squishmallows, Ninja Turtles (TMNT) and LEGO Speed Champions. The top 3 dollar gaining manufacturers for YTD November are Zuru, Banter Toys and Bandai.



# Category Trends

For YTD November 2023 vs. YGO, only 1 supercategory grew which was Drawing & Craft Supplies (+1%) driven by Markers (+21%). Vehicles declined -4% for YTD however Mini Vehicles (+24%) under this category was the top subclass gainer (both YTD and for the month vs. Nov 2022) driven by Hot Wheels and The Fast and The Furious, followed by Traditional Plush (+5%) driven by Squishmallows and Rainbocorns and Strategic Trading Card Games (+9%) from Pokémon and One Piece.

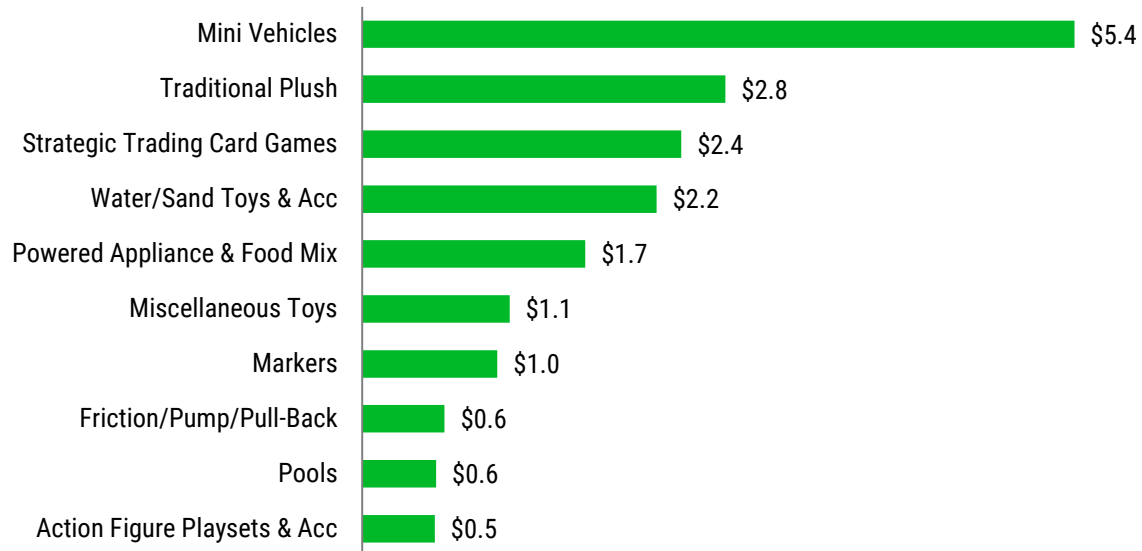
% Value Change YTD



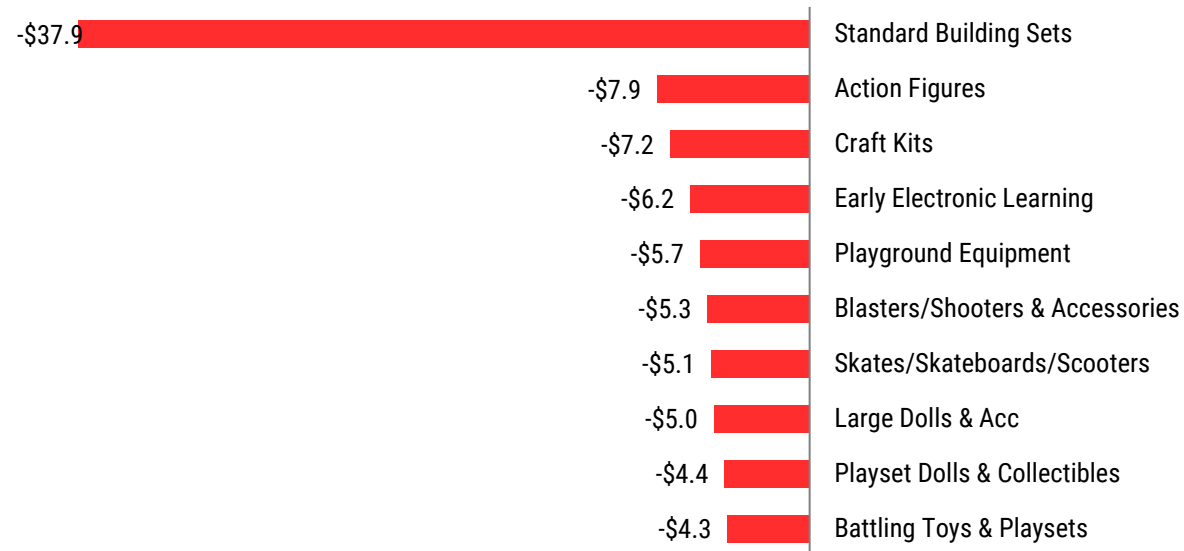
# Subclass Trends

The top 3 subclass gainers this month were Mini Vehicles (+22%) driven from Hot Wheels and The Fast and The Furious followed by Power Appliance & Food Mix (+>100%) from Chill Factor and Miscellaneous toys (+23%) from Miniverse. Standard Building Sets remain the most declining subclass of -10% declining from LEGO Ideas, LEGO City and LEGO Star Wars.

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



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



# Property Trends

## Top 5 new properties November '23

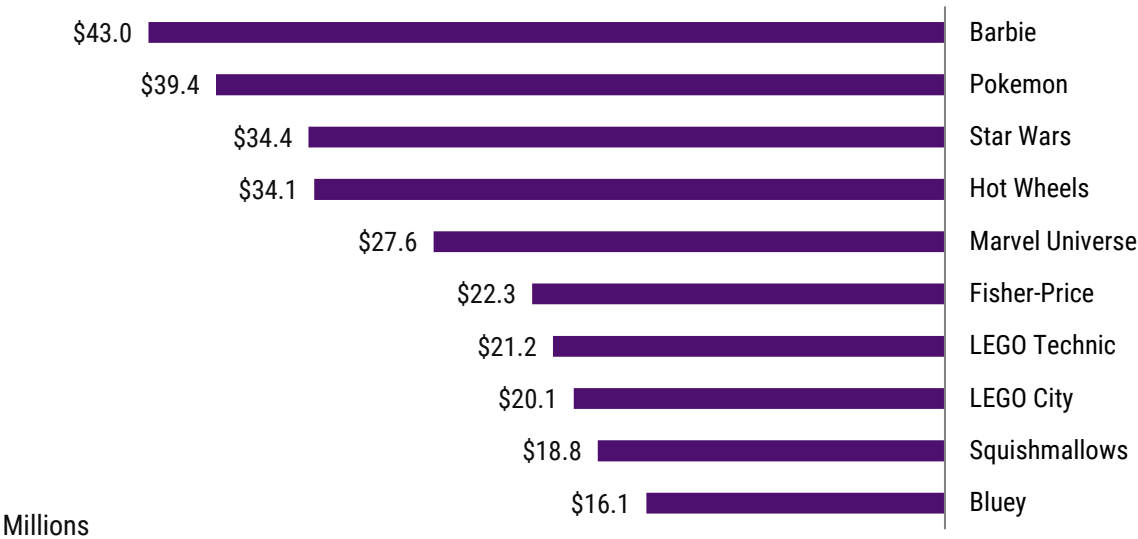
- #1 – LEGO DREAMZzz
- #2 – Bitzee
- #3 – Cookeez Makery
- #4 – Furby
- #5 – Beast Lab

New: Property sold \$0 FY 2022

## Top 5 dollar gaining properties November'23 vs. November'22

- #1 – Ninja Turtles (TMNT)
- #2 – Bluey
- #3 – LEGO Icons
- #4 – Squishmallows
- #5 – Paw Patrol

### Top 10 Properties YTD



### \$ Value Change vs YAG



## For more information

Contact Circana, Inc. and Circana Group, L.P. at 866-444-1411 or email [HelpDesk@circana.com](mailto:HelpDesk@circana.com), or your account representative below.

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