

ATA Report

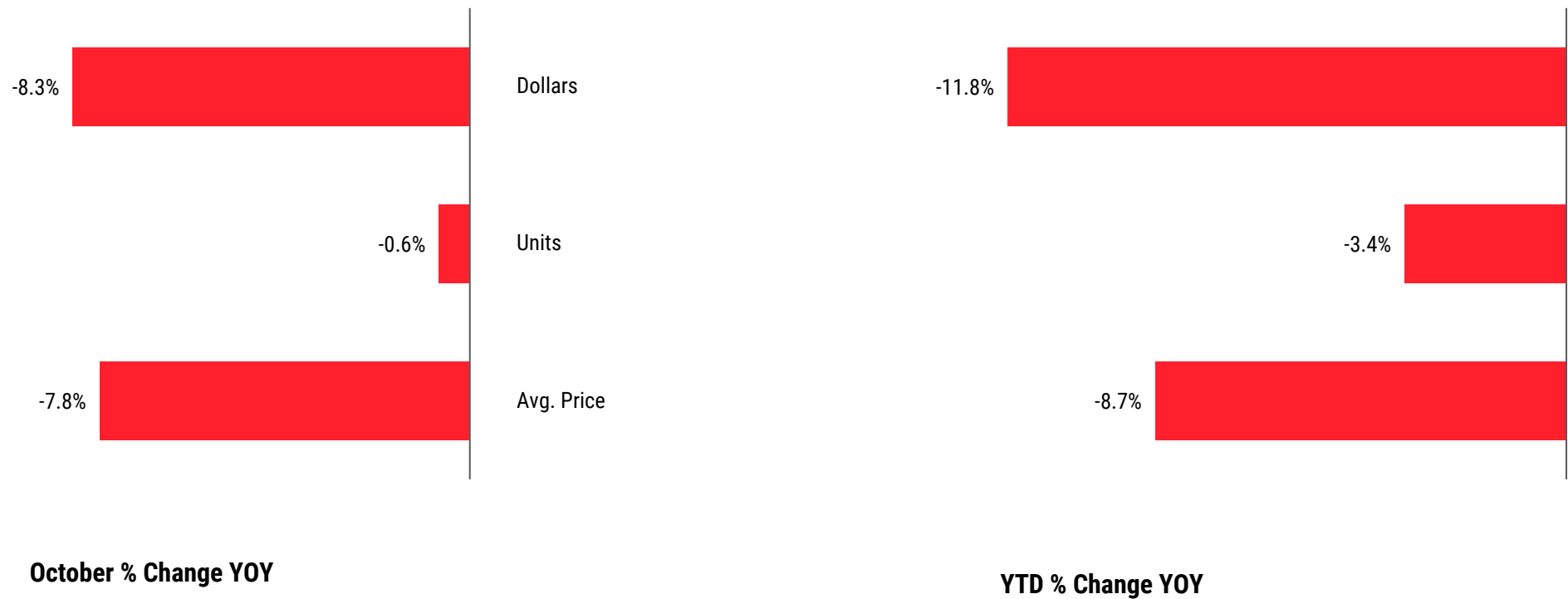
Oct 2023

Australia Toy Association



Industry Trends

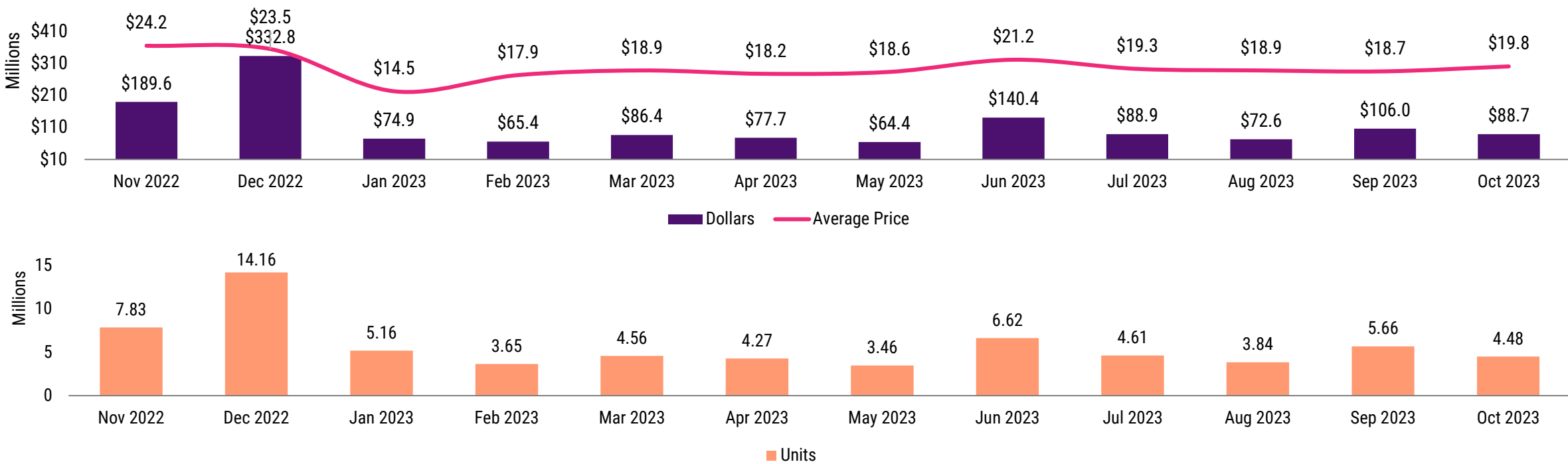
October 2023 declined -8% vs. YGO for dollars, Units declined -1% and average price declined -8% (\$19.79). 4 supercategories grew this month as Plush is the top gaining category which grew +7%, followed by Games/Puzzles (+4%), Vehicles (+3%) and Youth Electronics (+8%). The remaining 9 supercategories declined, the largest decliners are Building Sets (-15%), Dolls (-14%) and Infant/toddler/Preschool Toys (-12%). For YTD October 2023, total dollars declined -12% (Global Declined -7%) and the largest category drop continues to be Building Sets (-17%).



Monthly Trend

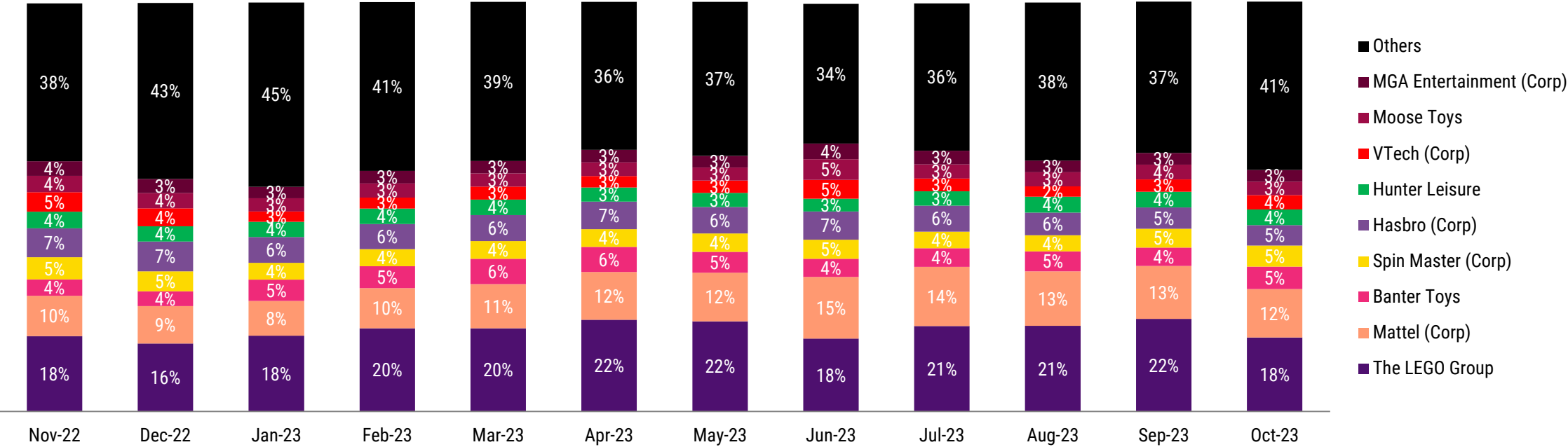
For October 2023, Building Sets continues to be the largest dollar made category but the largest decliner of -15%. The next largest dollar made categories are Infant/Toddler/Preschool Toys (-12%), Outdoor & Sports Toys (-7%), Dolls (-14%), Games/Puzzles (+4%) and Plush (+7%). Average Price was \$21.46 in October 2022 and declined -8% to \$19.79 in 2023 driven from mostly licensed toys and from unlicensed toys.

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



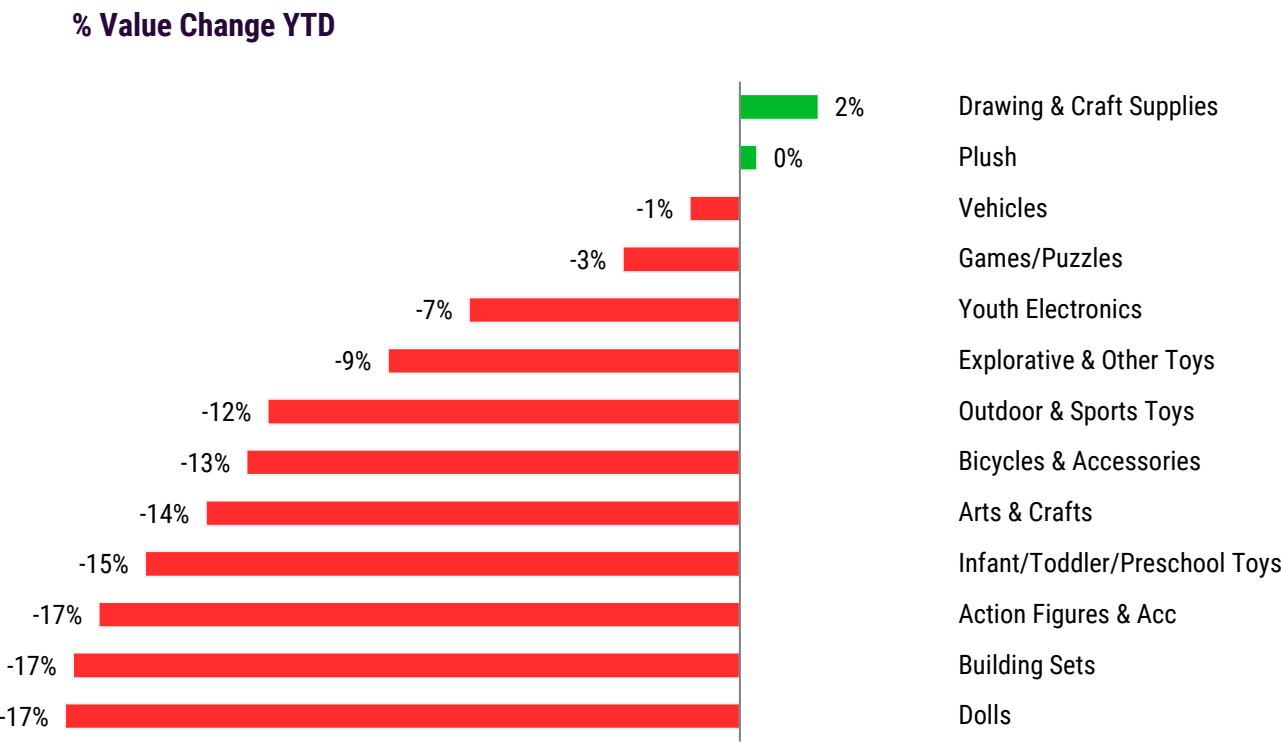
Corporate Manufacturers Trends

LEGO is the leading dollar for October 2023, however experienced the most dollar drop which lost 2 share points vs. October 2022. Zuru had the largest dollar growth which grew 2 share points vs. October 2022, followed by Mattel and Banter. Pokémon is the leading dollar property in October 2023, followed by Barbie and Hot Wheels. For YTD October 2023, the largest dollar gaining properties are Squishmallows, Hot Wheels and Pokémon. The top 3 dollar gaining manufacturers for YTD October are Zuru, Banter Toys and Newell Brands.



Category Trends

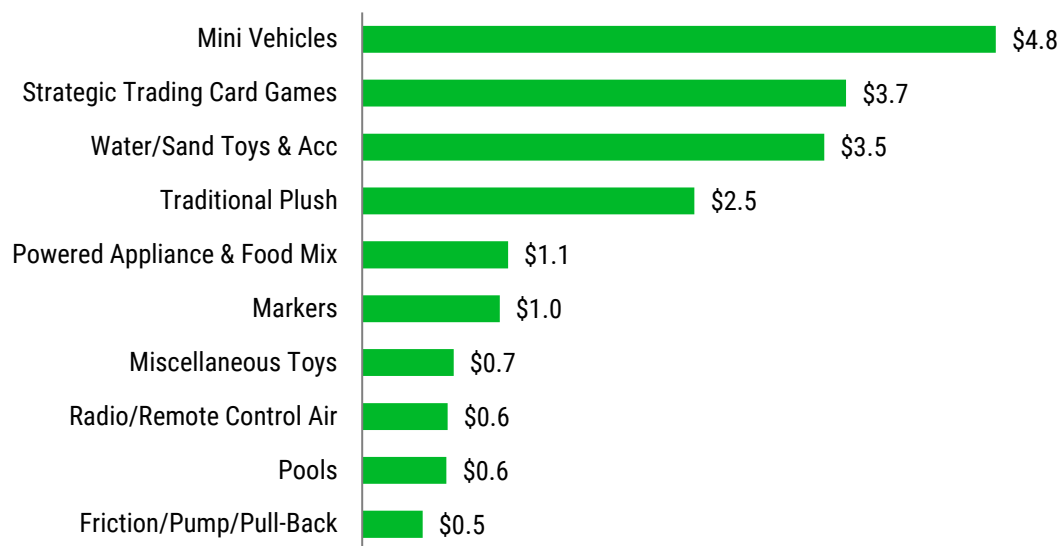
For YTD October 2023 vs. YGO, Drawing & Crafts Supplies grew +2% driven from Markers (+24%) and Plush is at a flat, but gained in absolute dollars driven from predominately Squishmallows. For the month October 2023 vs. YGO, 4 supercategories grew, Plush grew +7% driven from Squishmallows and Rainbocorns, Games/Puzzles grew +4% from Pokémon and One Piece, Vehicles grew +3% from Hot Wheels and Youth Electronics grew +8% from Bitzee and Robo Alive.



Subclass Trends

The top 3 subclass gainers this month were Water/Sand Toys (+37%) driven by Wahu, Bluey and Bunch O Balloons, Mini Vehicles (+50%) from Hot Wheels and Traditional Plush (+15%) driven by Squishmallows and Rainbocorns. Standard Building Sets remain the most declining subclass of -15% declining from LEGO Technic, LEGO Super Mario Brothers and LEGO Friends.

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



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



Property Trends

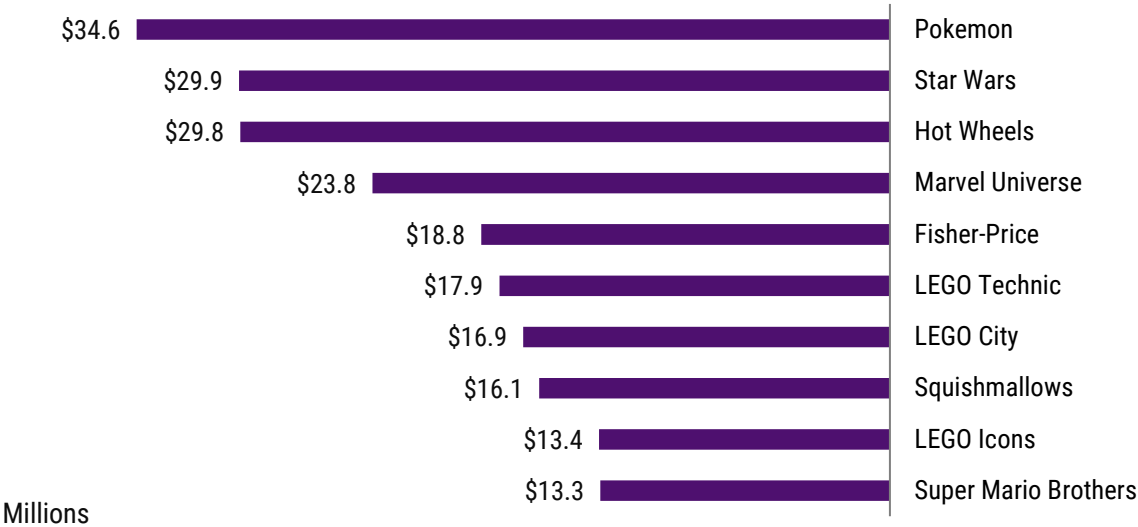
Top 5 new properties October'23

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

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

- #1 – Squishmallows
- #2 – Ninja Turtles (TMNT)
- #3 – Hot Wheels
- #4 – Pokémon
- #5 – Paw Patrol

Top 10 Properties YTD



\$ Value Change vs YAG



For more information

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About Contact Circana, Inc. and Circana Group, L.P.

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