

ATA Report

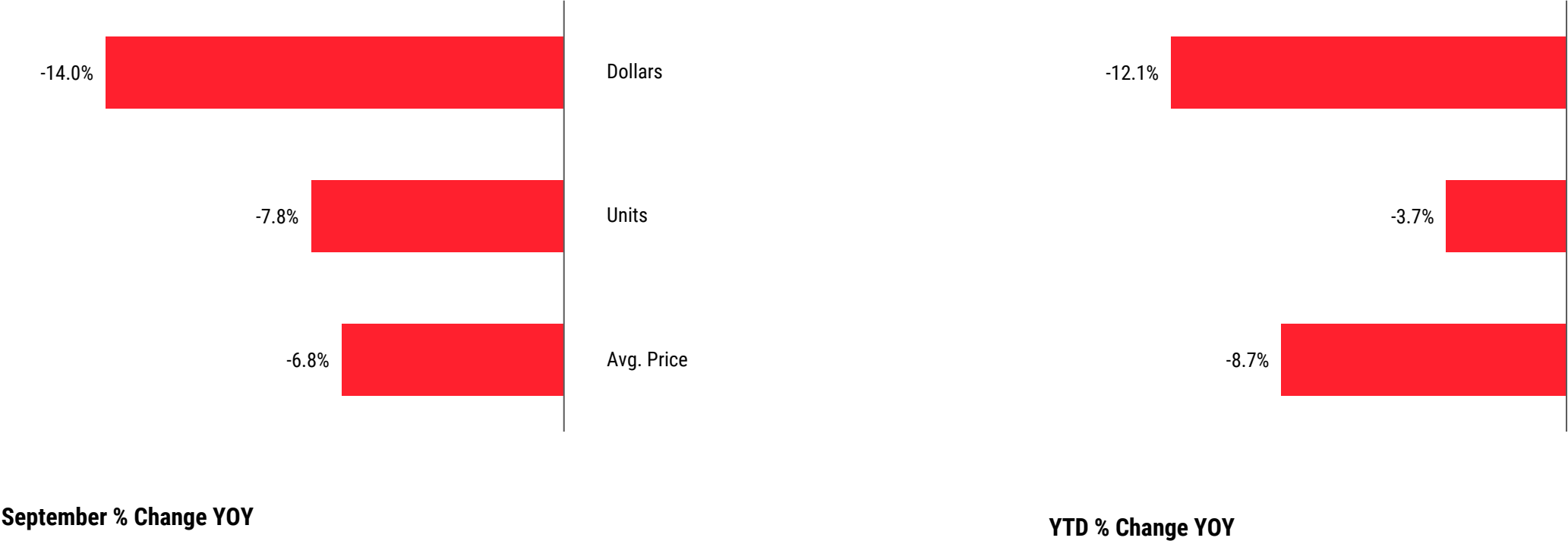
Sep 2023

Australia Toy Association



Industry Trends

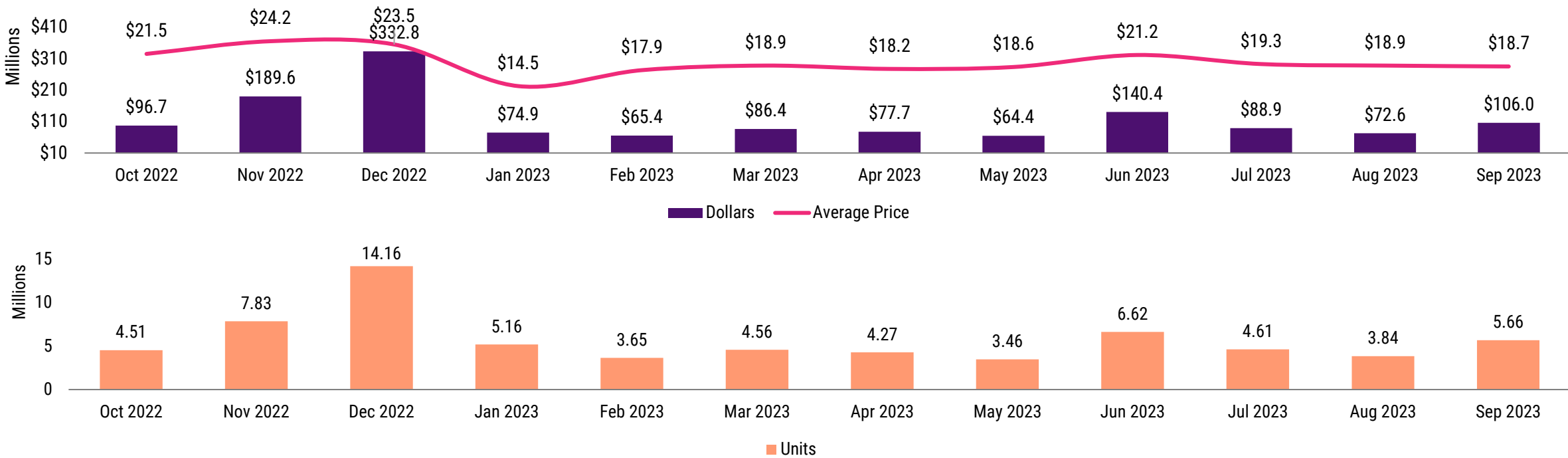
September 2023 experienced a -14% decline vs YGO for dollars, Units declined -8% and average price declined by -7% (\$18.74). None of the supercategories grew for this month, but the least decliners was Vehicles (-1%) and Youth Electronics (-4%), meanwhile the 3 largest decliners were Infant/Toddler/Preschool Toys (-23%), Building Sets (-13%) and Dolls (-15%). For YTD September, total dollars declined by -12% (Global declined -7%) and the largest category drop continues to be Building Sets (-17%).



Monthly Trend

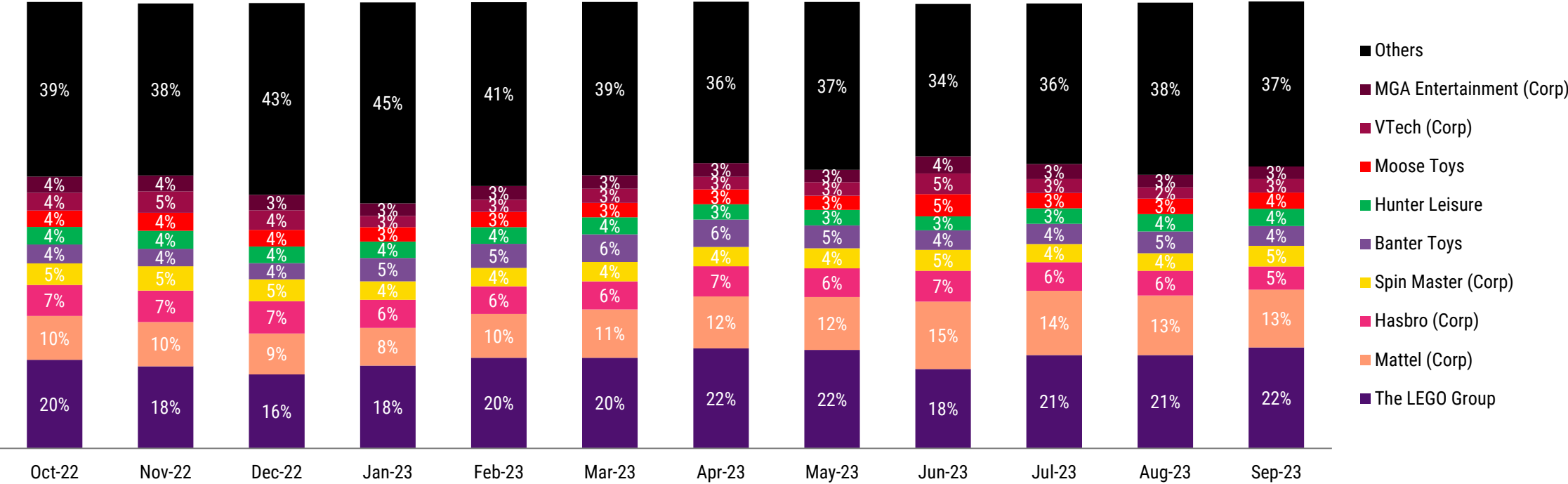
For September 2023, Building Sets is the largest dollar made category and the 2nd largest decliner of -13%. The next largest dollar made categories are Infant/Toddler/Preschool Toys (-23%), Dolls (-15%), Outdoor & Sports Toys (-10%), Vehicles (-1%) and Games/Puzzles (-18%). Average Price was \$20.11 in September 2022 and declined to \$18.74 in 2023 driven from both licensed and unlicensed toys.

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



Corporate Manufacturers Trends

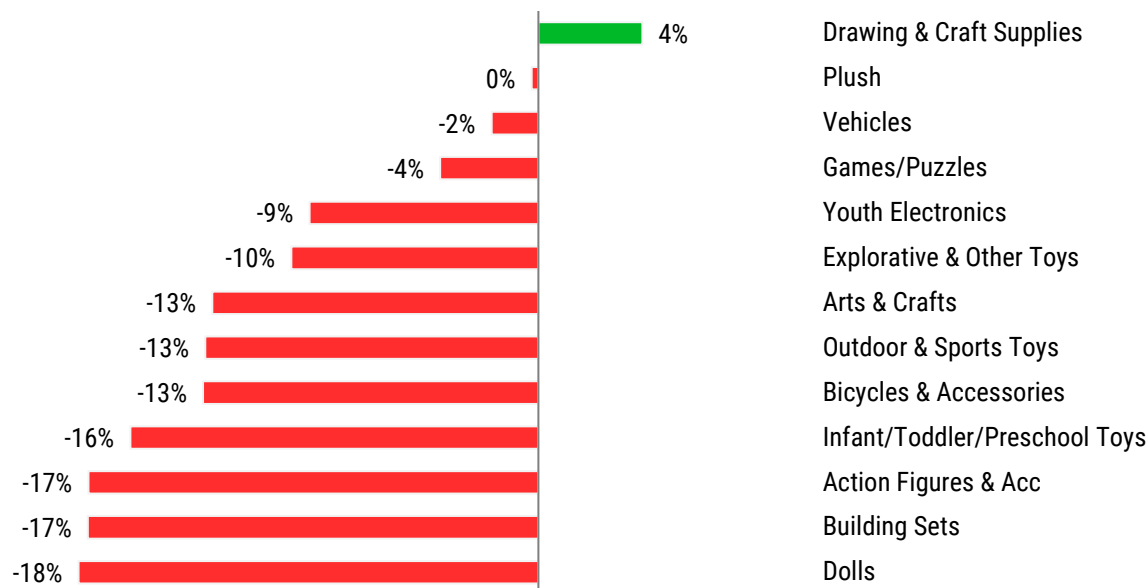
LEGO is the leading dollar made manufacturer for September 2023 which remain the same share vs. YGO, however Zuru had the largest dollar growth which grew 2 share points vs. YGO. Star Wars is the leading dollar property, followed by Barbie and Hot Wheels. For YTD September, the largest dollar gaining properties are Hot Wheels, Squishmallows and Pokémon (Pokémon was previously the #1 gaining property in YTD August 23” vs. 22”). The top 3 dollar gaining manufacturers for YTD September continues to be Banter Toys, Zuru and Newell Brands.



Category Trends

For YTD September 2023 vs. YGO, only 1 supercategory grew which was Drawing & Craft Supplies (+4%) driven from Markers (+27%) predominately by Faber-Castell. Despite Vehicles declining -2% for the YTD, Mini Vehicles was the top gaining subclass which grew +22% from Hot Wheels. For September 2023 vs. YGO, Mini Vehicles (+36%) was the 2nd top subclass gainer for the month, Water/Sand Toys (+52%) was the top subclass gainer for the month from Wahu and Bunch O Balloons and Miscellaneous toys (+32%) from Elmer's and Miniverse.

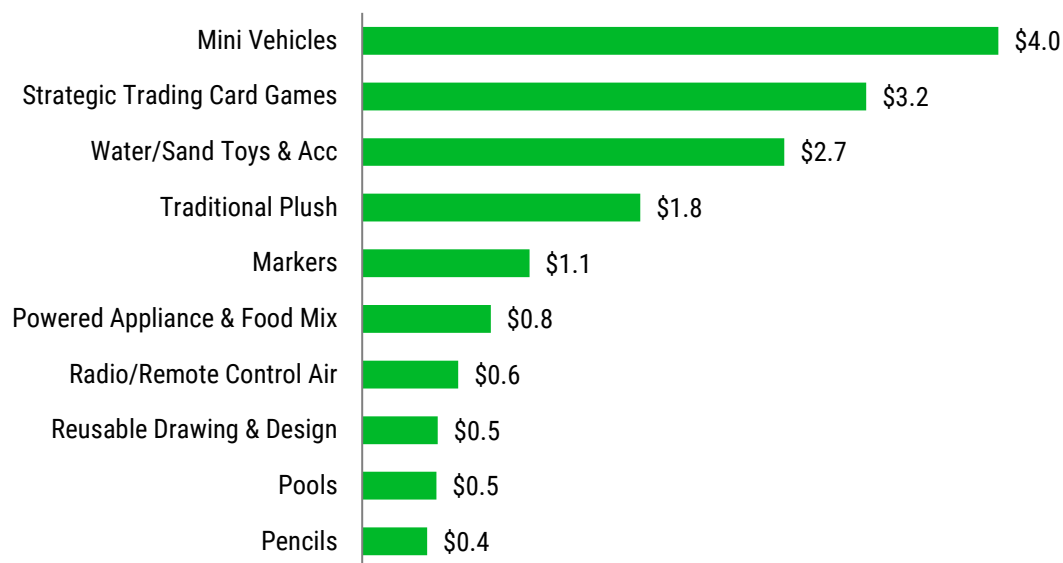
% Value Change YTD



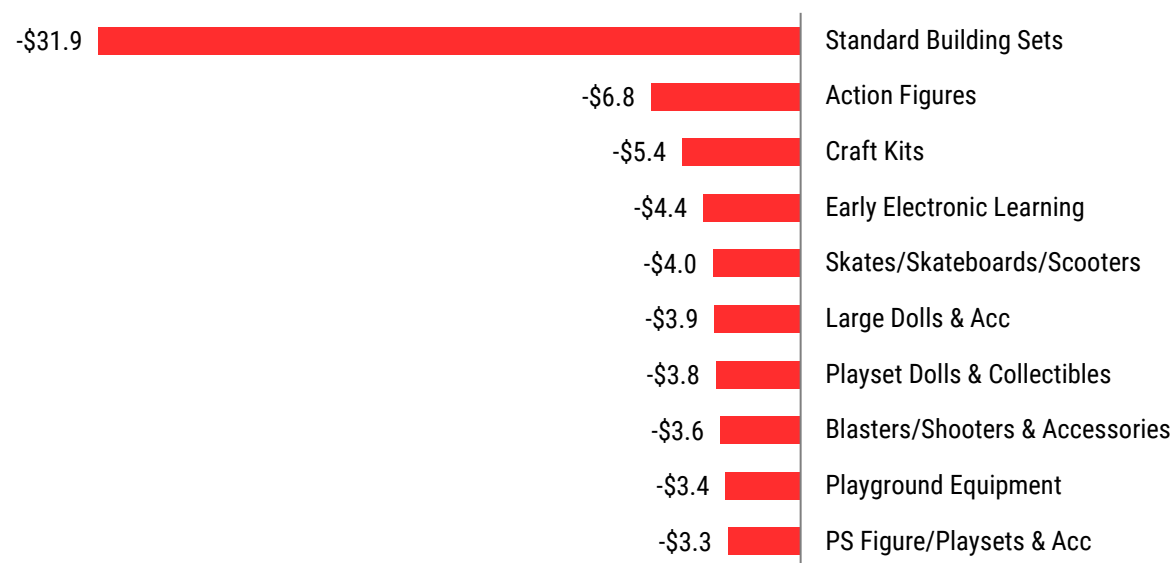
Subclass Trends

There were no supercategories which grew this month vs. YGO, however Water/Sand Toys (+52%) driven from Wahu and Bunch O Balloons, Mini Vehicles (+36%) mainly driven from Hot Wheels and Miscellaneous toys (+32%) from Elmer's and Miniverse were the top 3 gaining subclasses. Standard Building Sets remains the most declining subclass of -12% predominately declining from LEGO Technic, LEGO Ideas and Jurassic Park/World.

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



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



Property Trends

Top 5 new properties September'23

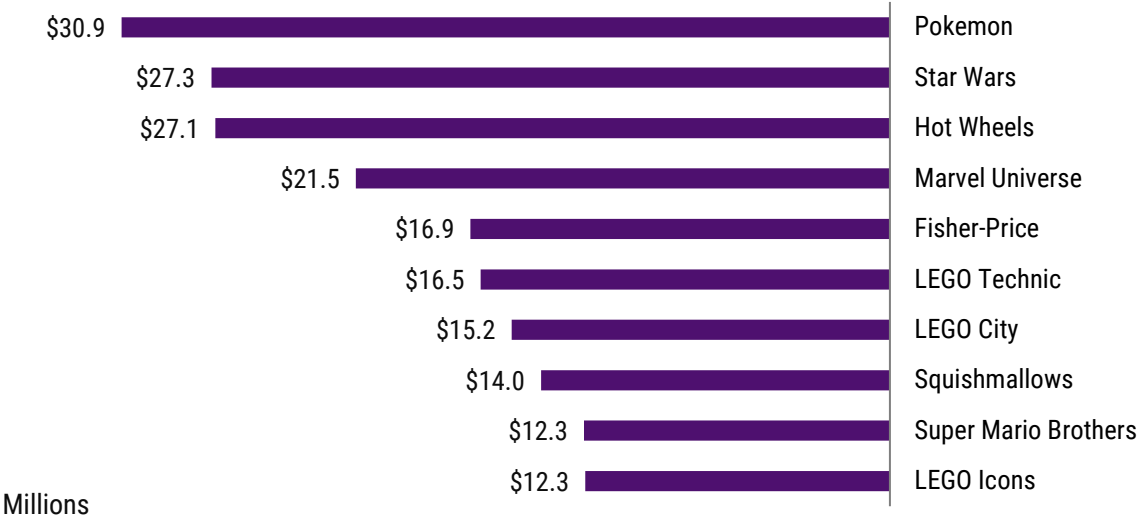
- #1 – LEGO DREAMZzz
- #2 – Furby
- #3 – Bitzee
- #4 – Cookeez Makery
- #5 – Miniverse

New: Property sold \$0 FY 2022

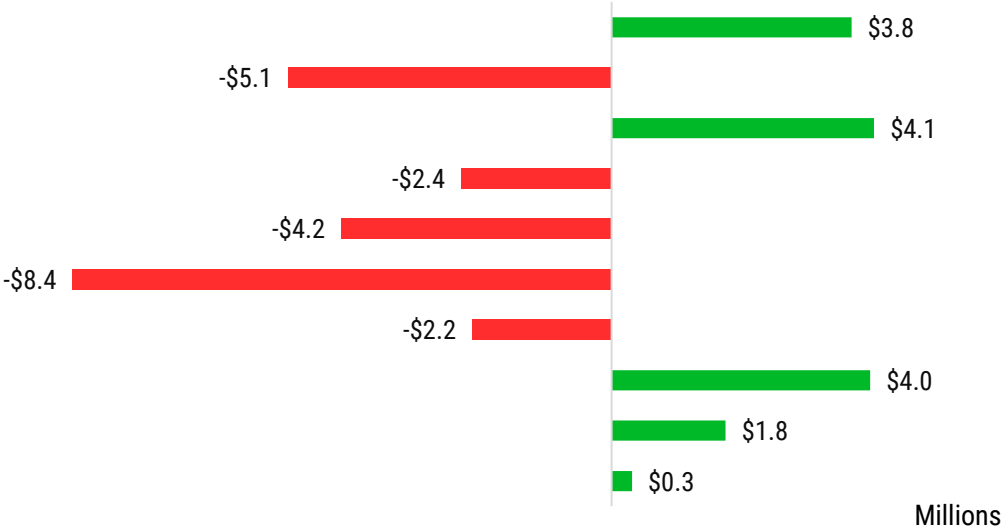
Top 5 dollar gaining properties September'23 vs. September'22

- #1 – Ninja Turtles (TMNT)
- #2 – LEGO Star Wars
- #3 – LEGO DreamZzz
- #4 – Sonic The Hedgehog
- #5 – Hot Wheels

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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