

ATA Report

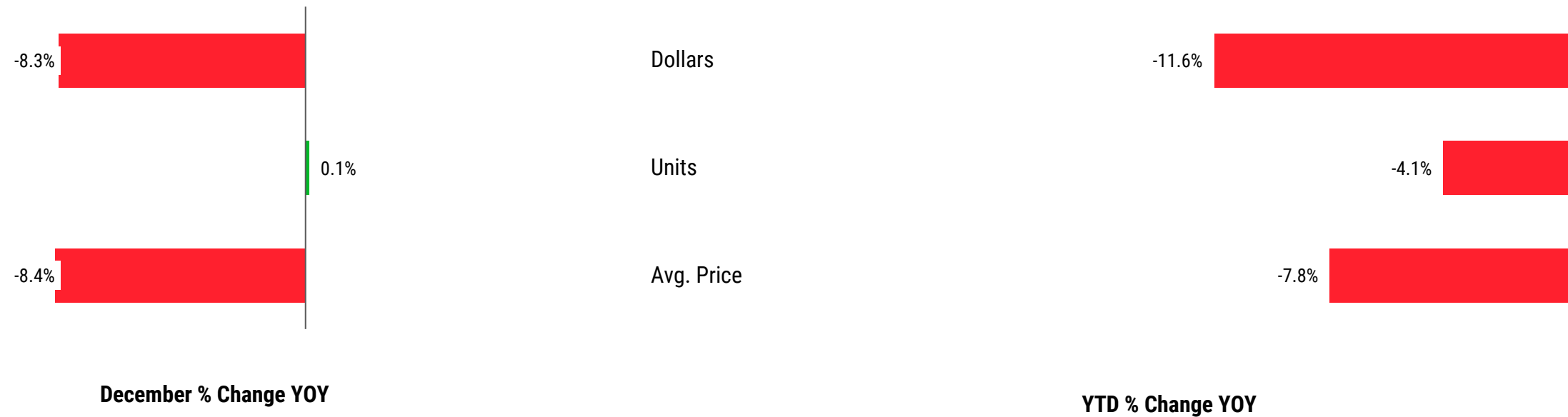
Dec 2023

Australia Toy Association



Industry Trends

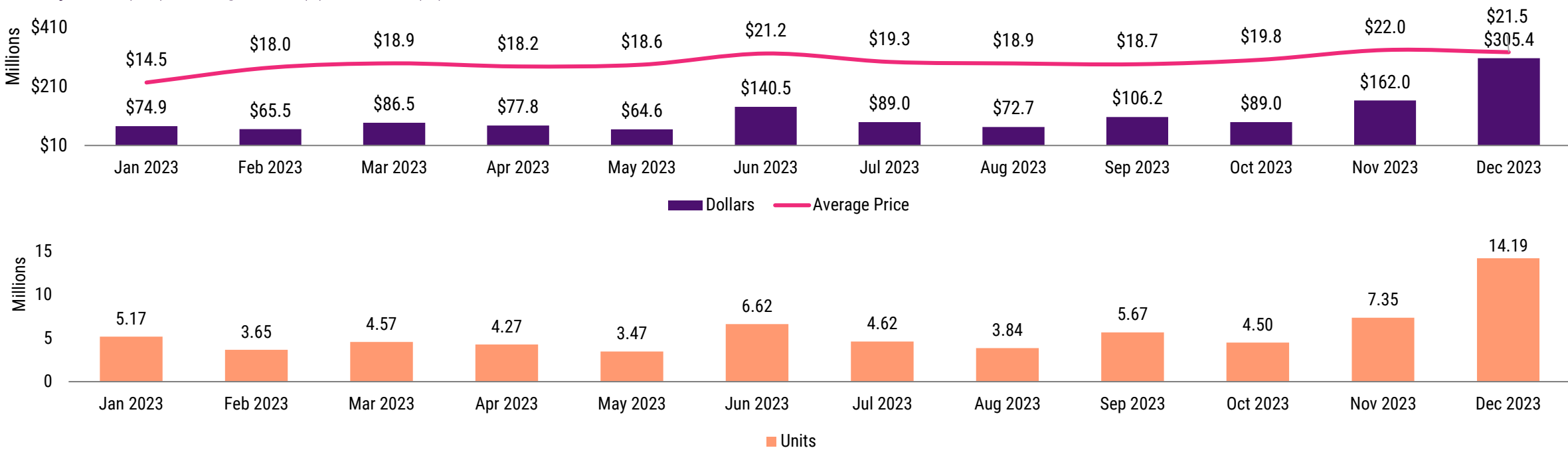
December 2023 declined -8% vs. YGO for dollars, units at flat and average price declined -8% (\$21.52). 11 categories declined this month; Youth Electronics was the only growing category which grew 10% meanwhile Building Sets at flat. The 3 largest decliners were Outdoor & Sports Toys (-14%), Infant/Toddler/Preschool Toys (-14%) and Dolls (-13%). For the full year 2023, total dollars declined -12% (global declined -7%) and the largest category drop overall for this year was Building Sets (-13%), followed by Infant/Toddler/Preschool Toys (-15%) and Dolls (-16%).



Monthly Trend

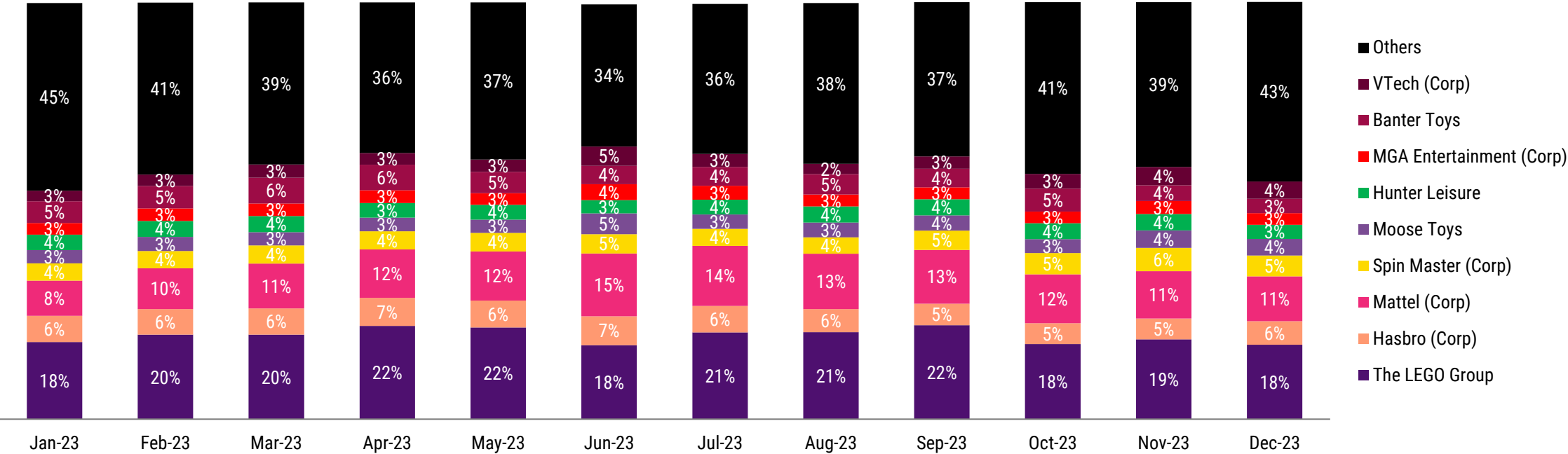
For December 2023, Building Sets was the largest dollar made category however remained flat for the month. The next largest dollar made categories after Building Sets are Outdoor & Sports (-14%), Infant/Toddler/Preschool Toys (-14%), Dolls (-13%), Games/Puzzles (-2%) and Vehicles (-10%). Average Price was \$23.50 in December 2022 and declined to \$21.52 in 2023 driven from both licensed (-10%) and unlicensed toys (-8%).

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



Corporate Manufacturers Trends

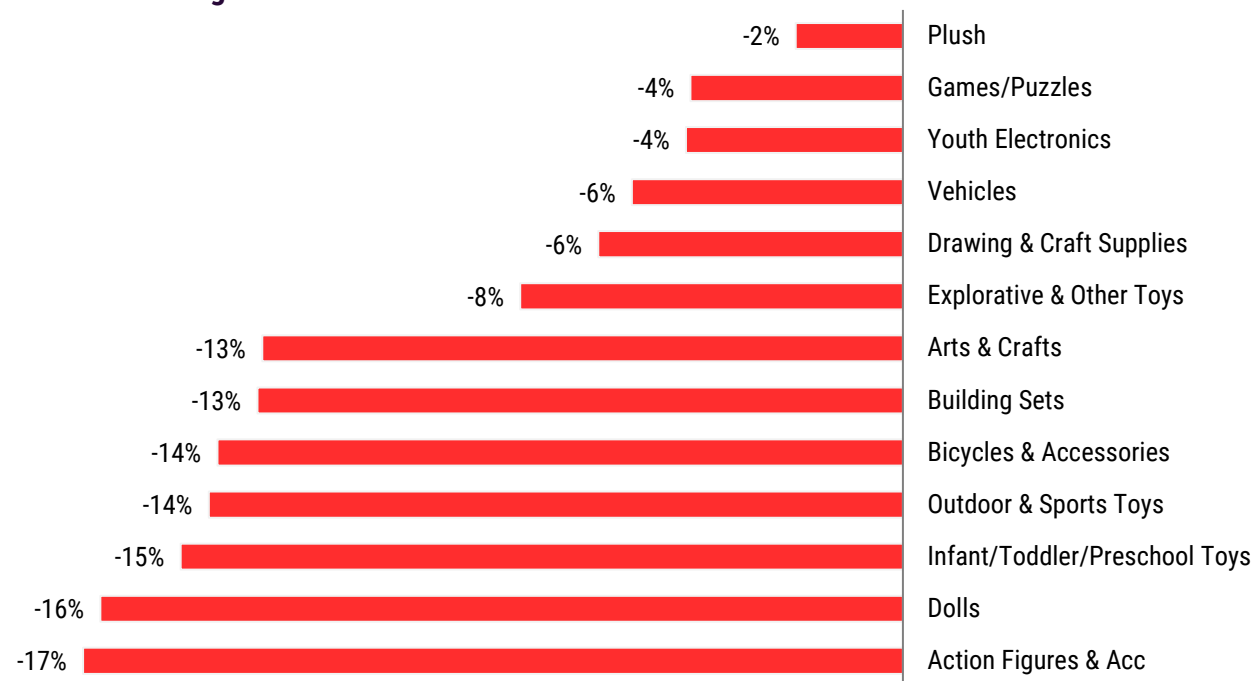
LEGO was the top dollar made manufacturer in December 2023 and gained 2 share points vs. YGO. Zuru was the largest dollar growth which grew 1 share point vs. YGO, followed by Mattel and Bandai. The top 3 dollar made properties for this month was Barbie, Star Wars and Pokémon. For the full year 2023, the largest dollar gaining properties are Ninja Turtles (TMNT), Squishmallows and LEGO Disney Classic. The top 3 dollar gaining manufacturers for this year was Zuru, Bandai and Banter Toys.



Category Trends

For the full year 2023, none of the categories grew however Mini Vehicles (+23%) was the top subclass gainer driven by Hot Wheels, followed by Traditional Plush (+5%) driven by Squishmallows and Rainbocorns. However, for December 2023 vs. YGO, Youth Electronics grew +10% driven by Bitzee and Robo Alive and Building Sets at flat but gained in absolute dollars driven by LEGO Icons, LEGO Disney Classic and LEGO Speed Champions.

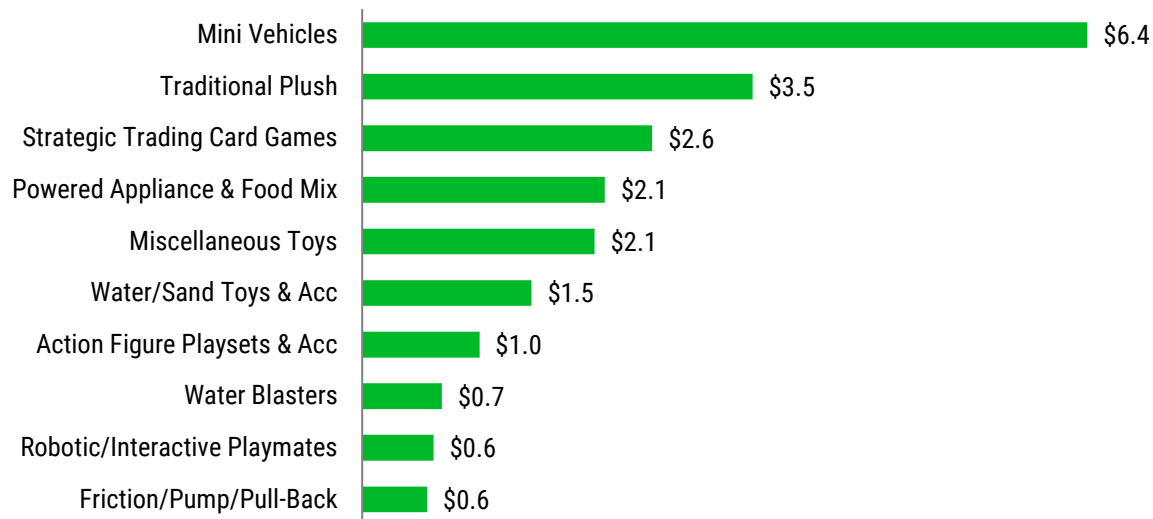
% Value Change YTD



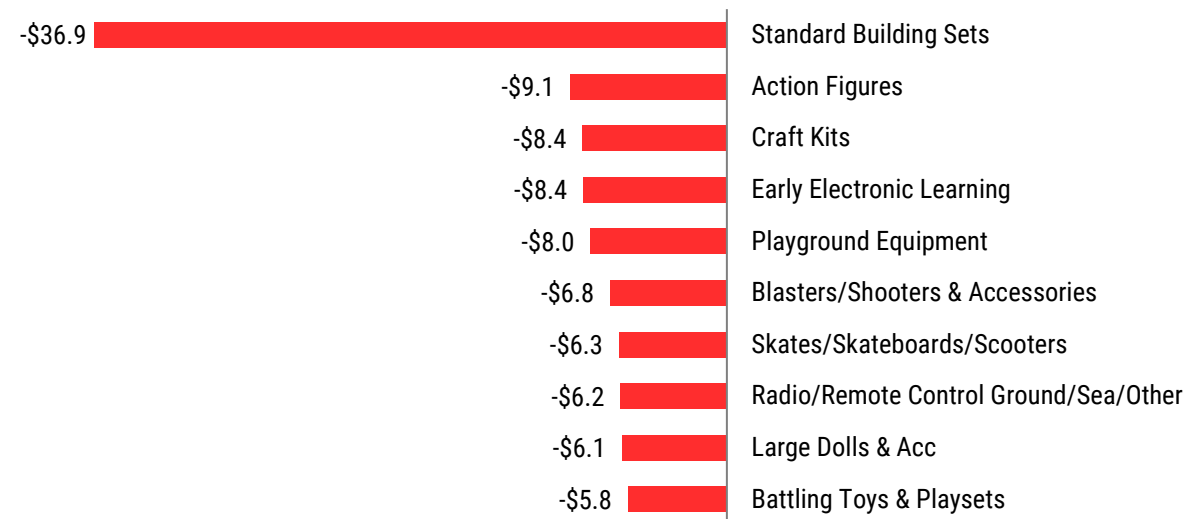
Subclass Trends

The top 3 subclass gainers this month are Robotic/Interactive Playmates (+36%) driven from Bitzee and Robo Alive followed by Standard Building Sets (+2%) driven from LEGO Icons, LEGO Disney Classic and LEGO Speed Champions and Miscellaneous Toys (+23%) driven from Miniverse and Cra-Z-Art. Playground Equipment was the most declining subclass of -48% driven predominately from unlicensed toys.

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



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



Property Trends

Top 5 new properties December '23

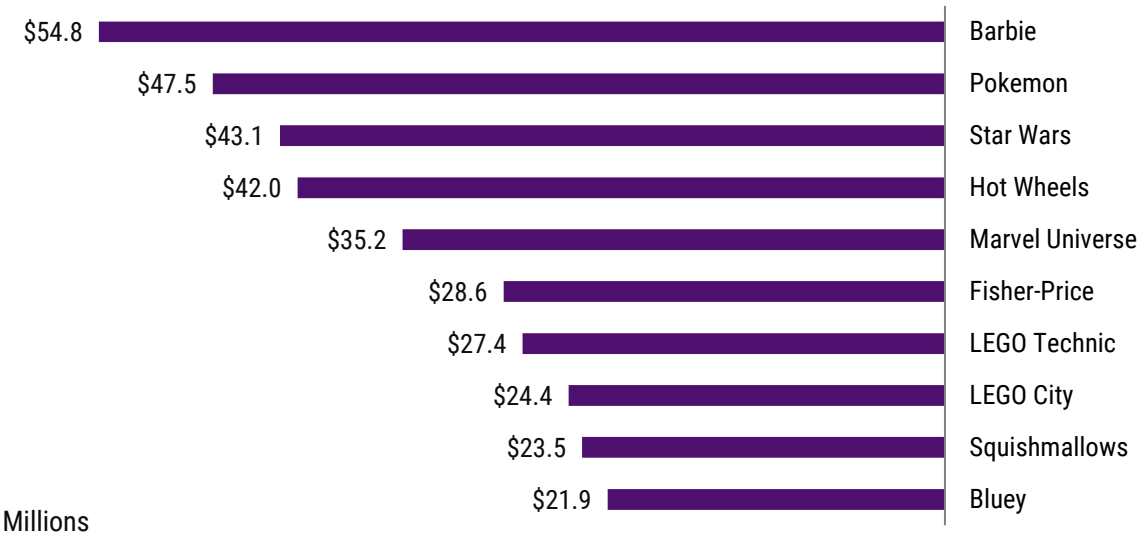
- #1 – LEGO Disney Classic
- #2 – LEGO DREAMZzz
- #3 – Bitzee
- #4 – Cookeez Makery
- #5 – Furby

New: Property sold \$0 FY 2022

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

- #1 – LEGO Icons
- #2 – Ninja Turtles (TMNT)
- #3 – LEGO Disney Classic
- #4 – LEGO Speed Champions
- #5 – Bluey

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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