

INDUSTRY REPORT

CategoryIQ Stuffed Toys

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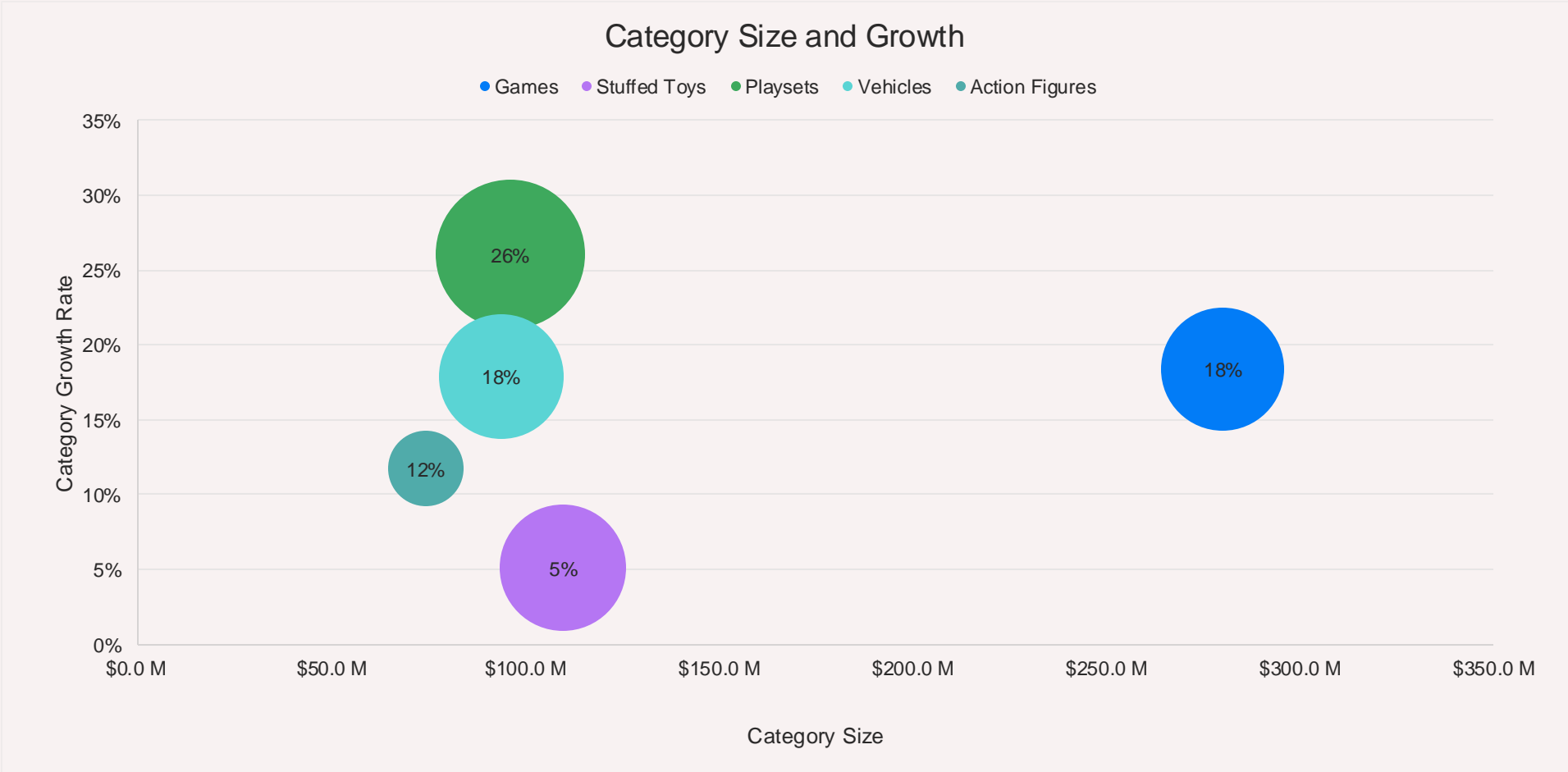
On average, categories have grown by 18%, indicating a positive market trend



Takeaway

Playsets category size grew 26% from \$76.2M to \$96M
Activity Kit category size grew 34.5% from \$40.5M to \$54.5M

The largest category, Games, grew 18.4% from \$236.6M to \$280.1M



Competitor Watch: Top Gainers and Losers

Top Gainers			Top Losers	
Category				
Action Figures	Transformers - Hasbro 7.4% (1.1%)	Marvel - Hasbro 8.7% (1.0%)	Tamashii Nations 4.0% (-1.3%)	Paw Patrol - Spin Master 1.0% (-0.4%)
Activity Kit	Crayola 18.6% (6.7%)	Mr. Sketch 2.1% (0.8%)	Bukebu 0.4% (-0.9%)	Melissa & Doug 4.8% (-0.8%)
Dolls	American Girl 6.7% (3.6%)	Spin Master 1.7% (1.5%)	Mattel 6.5% (-5.1%)	L.O.L. Surprise 7.1% (-1.9%)
Games	Magic The Gathering 4.6% (1.0%)	Hasbro Gaming 6.5% (0.3%)	Move2play 0.1% (-0.4%)	Spinmaster Games 1.2% (-0.3%)
Outdoor Toys	Appleround 4.6% (2.2%)	Yuebo 4.6% (0.8%)	Hoperock 2.2% (-2.1%)	Toysmith 0.9% (-1.4%)
Playsets	Tonies 10.4% (6.2%)	Kidkraft 1.2% (0.3%)	Gabby's Dollhouse 2.6% (-1.3%)	Hot Wheels 6.4% (-1.1%)
Stuffed Toys	Care Bears 0.9% (0.5%)	Just Play 2.3% (0.4%)	Gund 4.9% (-0.9%)	Hasbro Gaming 0.9% (-0.4%)
Vehicles	Joyin 5.1% (2.1%)	Likee 0.5% (0.2%)	Monster Jam 4.1% (-0.9%)	Syma 0.4% (-0.6%)



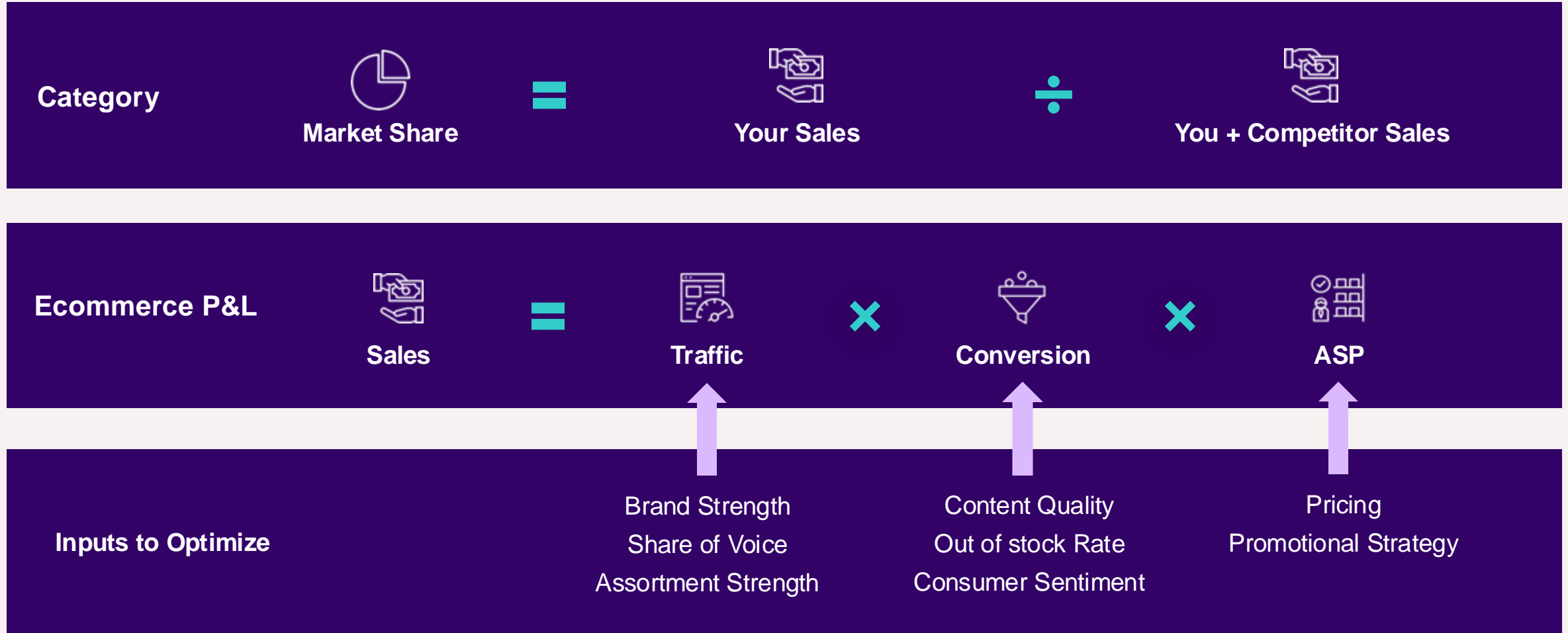
Category Deep Dive

Stuffed Toys



The Commerce Playbook hasn't changed

But the key factors are more interconnected and dynamic





Takeaway

Competitive Benchmarking – Top Brands

Just Play and Franco Gained Market Share While Squishmallows Lost Ground

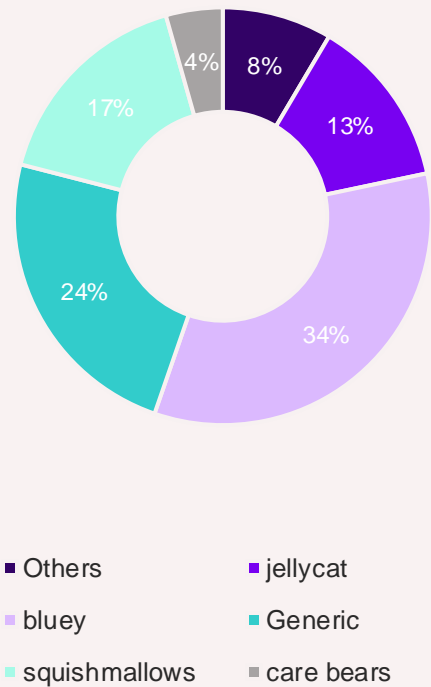
			Traffic			Pricing	
Brand	Market share	Sales	Brand Strength	Organic SoV	Sponsored SoV*	ASP	Promo Rate
Squishmallows	6.4% (-0.2%)	\$7.0M (1.7%)	16.6% (-0.1%)	6.2% (0.4%)	2.4% (-0.5%)	\$20.8 (0.6%)	0.0% (-0.1%)
Jellycat	4.8% (-0.1%)	\$5.2M (3.4%)	13.2% (5.4%)	9.9% (-0.5%)	1.5% (0.5%)	\$29.9 (0.0%)	
Disney - Hasbro	2.6% (0.2%)	\$2.8M (14.9%)				\$22.9 (3.9%)	
Just Play	2.3% (0.4%)	\$2.5M (26.3%)		0.6% (0.2%)	0.1% (0.1%)	\$15.7 (9.9%)	0.2% (-0.3%)
Aurora	2.1% (0.1%)	\$2.3M (12.0%)				\$12.0 (0.8%)	0.0% (0.0%)
Franco	1.9% (0.2%)	\$2.1M (15.2%)		0.1% (0.1%)	0.1% (0.0%)	\$23.9 (-0.2%)	0.0%
Pokemon - Jazwares	1.5% (-0.2%)	\$1.6M (-6.9%)		0.0% (0.0%)	0.0% (-0.1%)	\$26.5 (5.1%)	0.0% (-0.1%)

Just Play gained market share (from 2.3% to 2.7%) in category Stuffed Toys. Squishmallows saw the biggest change in promotion rate (declined from 3.4% to 2.9%) but lost market share (from 6.6% to 6.4%).

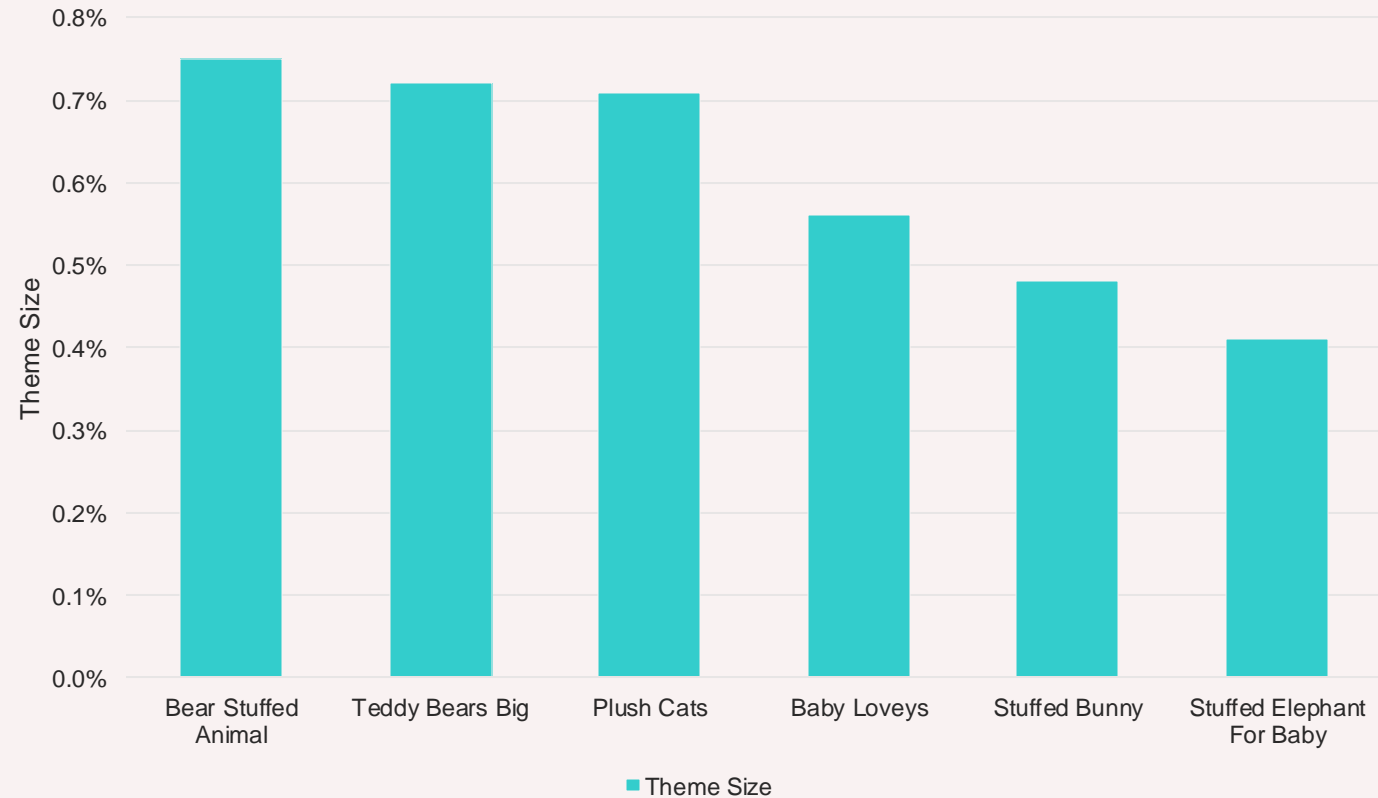
No significant movement was recorded in the ASPs of category leaders. Just Play and Pokemon – Jazwares saw significant uptick in the ASP, up by 9.9% and 5.1% respectively.

Traffic Drivers – Search Behavior

Amazon: Search Traffic Behavior



Shopper Search Themes



33 % of category search is directly for bluey products

Takeaway

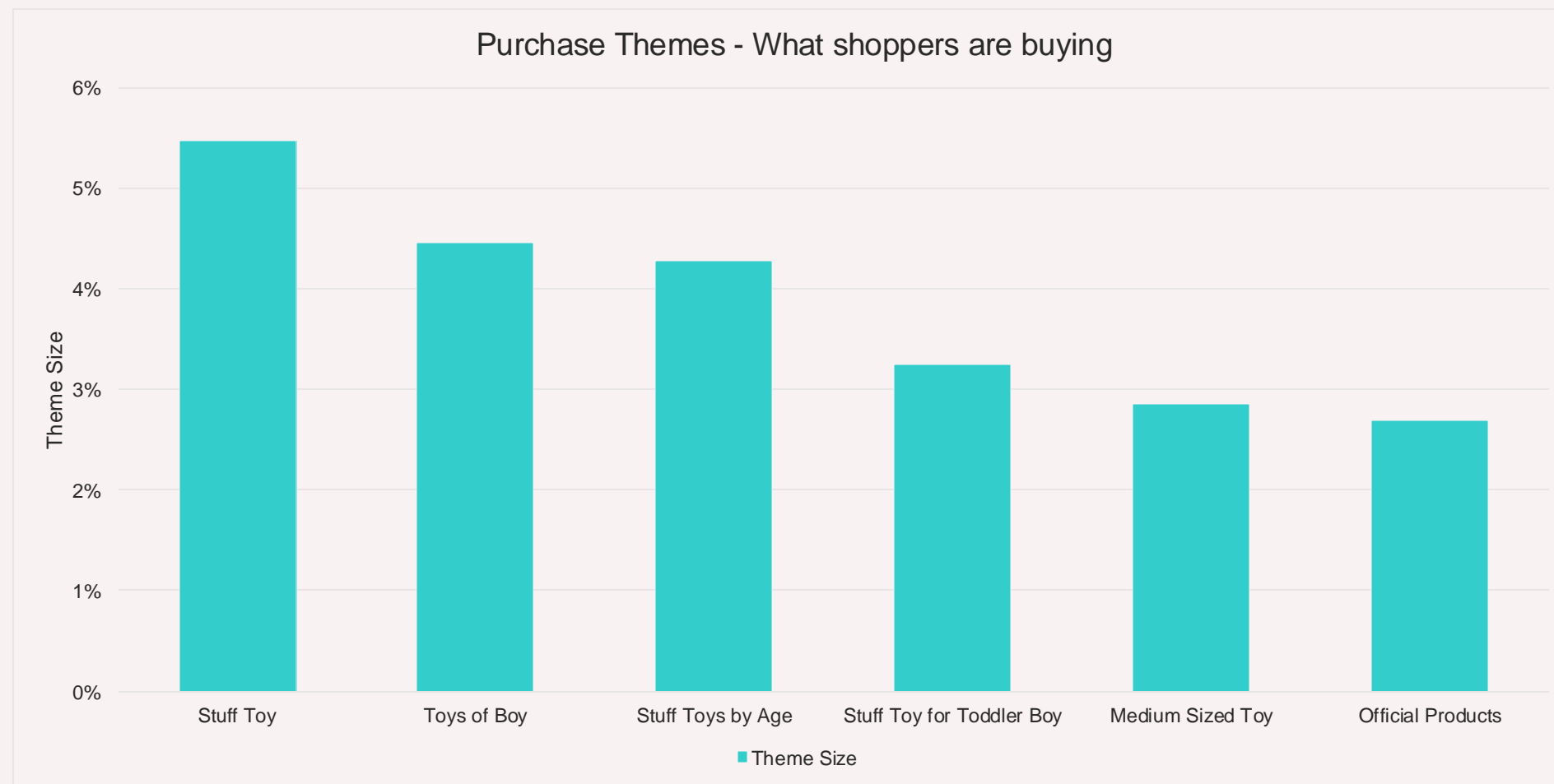
Bluey has a strong brand recall, 33% of category searches are directly for Bluey products

Wild Republic (11%), Morismos (10%) and Gund (9%) are the tops players in Bear Stuffed Animal segment



Takeaway

What shoppers are buying



Stuff Toy theme has the highest share in the category at 5.5%, followed by Toys for Boy 4.5% and Stuff Toys by Age 4.3%

What shoppers are buying



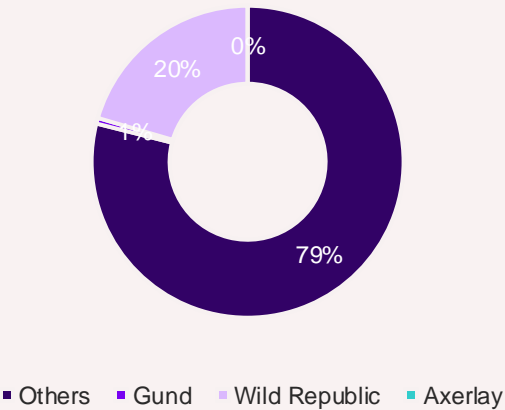
Takeaway

In the Stuffed Toy Theme, Wild Republic has the highest share of 20%

In Medium Sized stuffed toys, Squishmallows dominate with 55% share

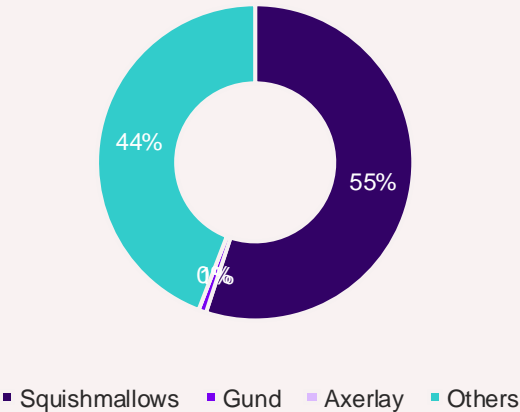
Stuffed Toy

Top Brand Share



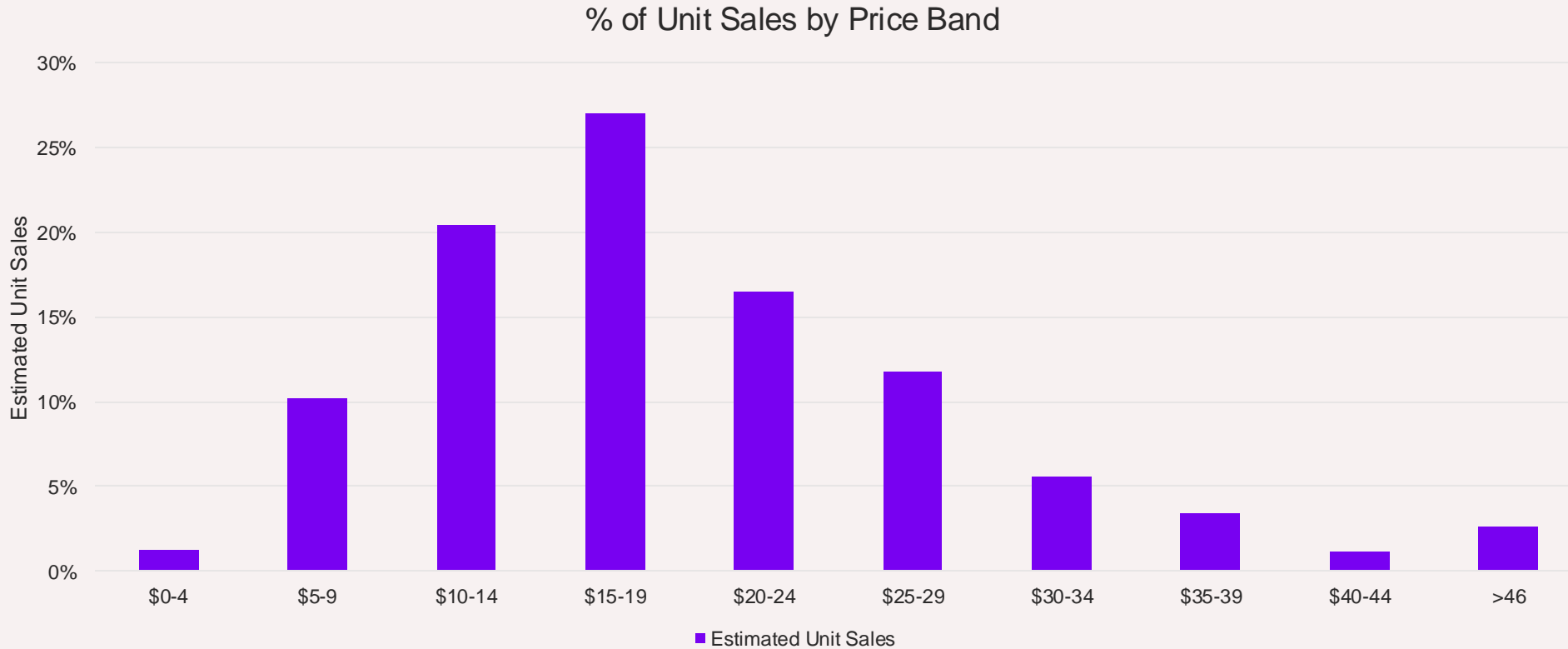
Medium Sized

Top Brand Share



Pricing Architecture – Unit Sales by Price Band

Category Price Band Analysis



Takeaway

Top 2 price bands: \$15-19 (33.5%) and \$10-14 (25.8%), combined share: 59.3%

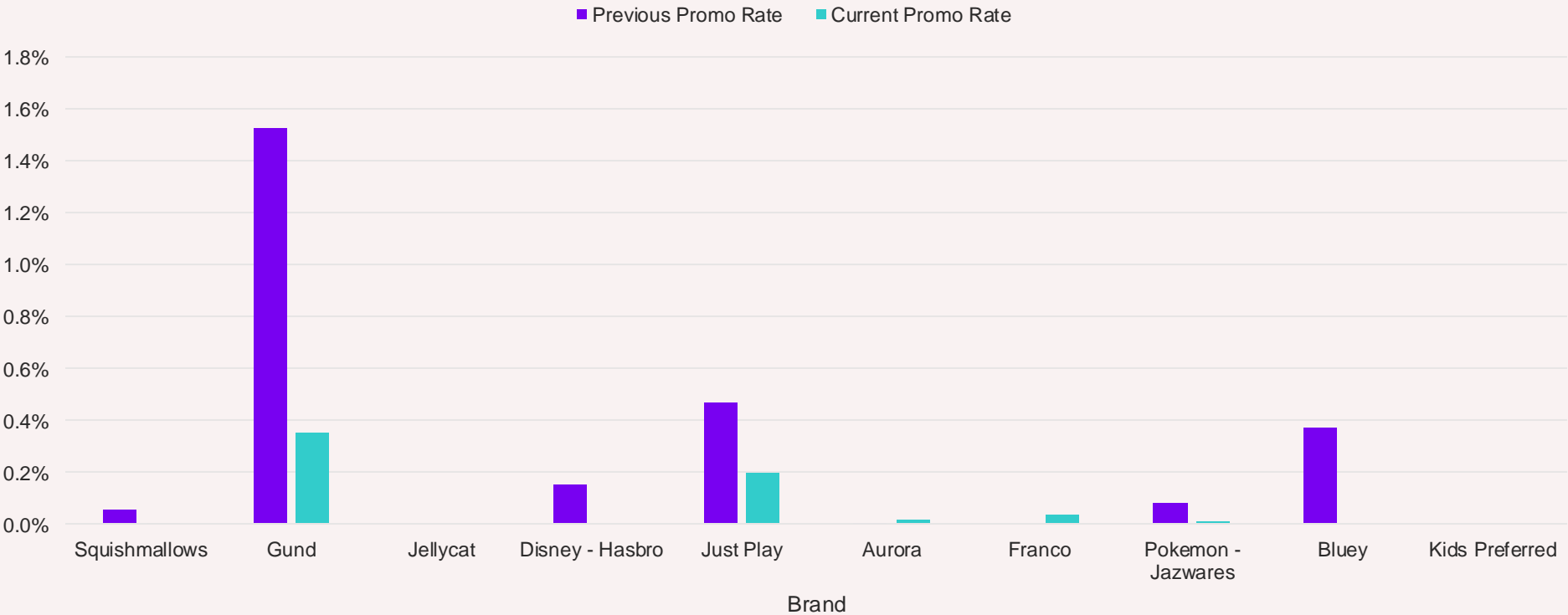
Tail price bands (\$35-39, \$40-44, >46) contribute 6.4% of units and 10.4% of revenue

\$15-19 price band contributes 33.5% of units and 31.7% of revenue; dominant brand: Squishmallows

Promotions Benchmarking

Promotion Rate and Change Analysis

Promotional Investment : Promo Rate by Brand



Takeaway

Aurora scaled up promotion by 15.1% from 0.06% to 15.7%

Gund scaled down promotion by 117% from 1.53% to 0.36%

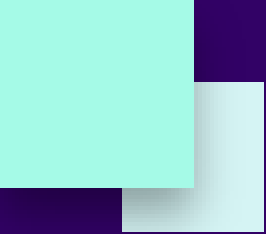
Just Play scaled down promotion by 27% from 0.47% to 0.20%

Squishmallows scaled down promotion by 50.7% from 0.05% to 0.0034%

Pokemon - Jazwares scaled down promotion by 7.3% from 0.09% to 0.01%

Franco scaled up promotion to 0.04%

Majority of brands are scaling down promotions



Ready to learn more about how
CommercelQ is helping **Stuffed Toy**
brands beat the competition?

[Request a demo](#)

