

ATA Report

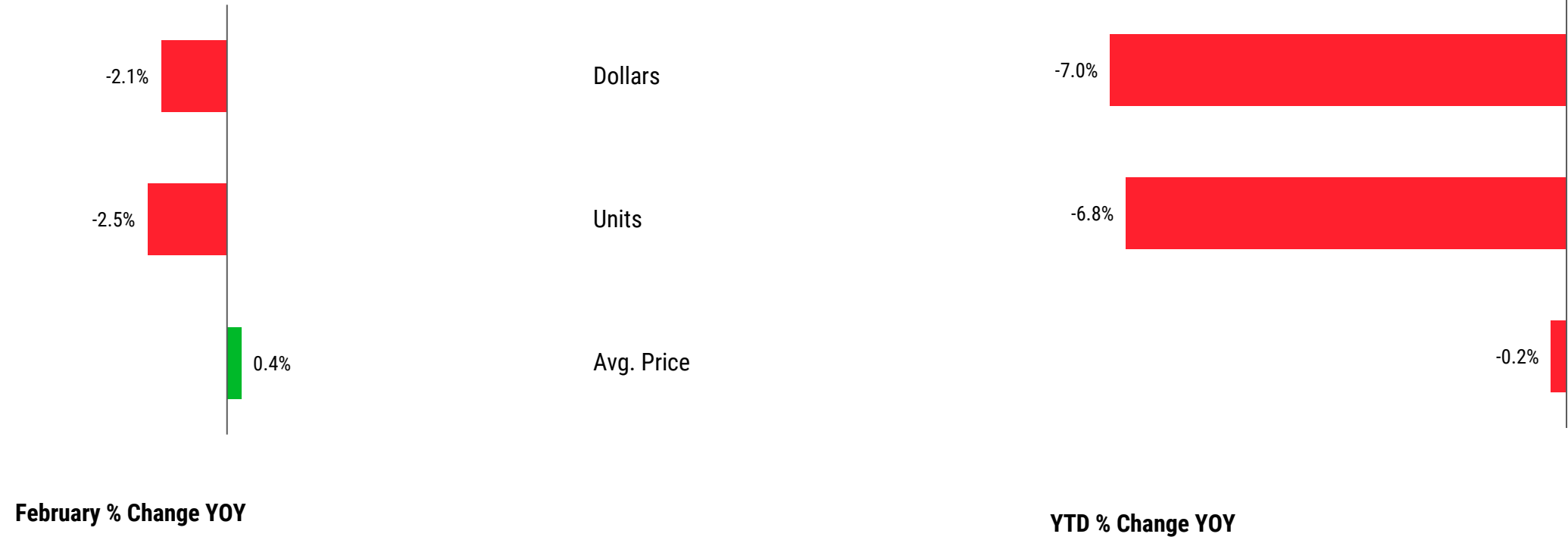
Feb 2024

Australia Toy Association



Industry Trends

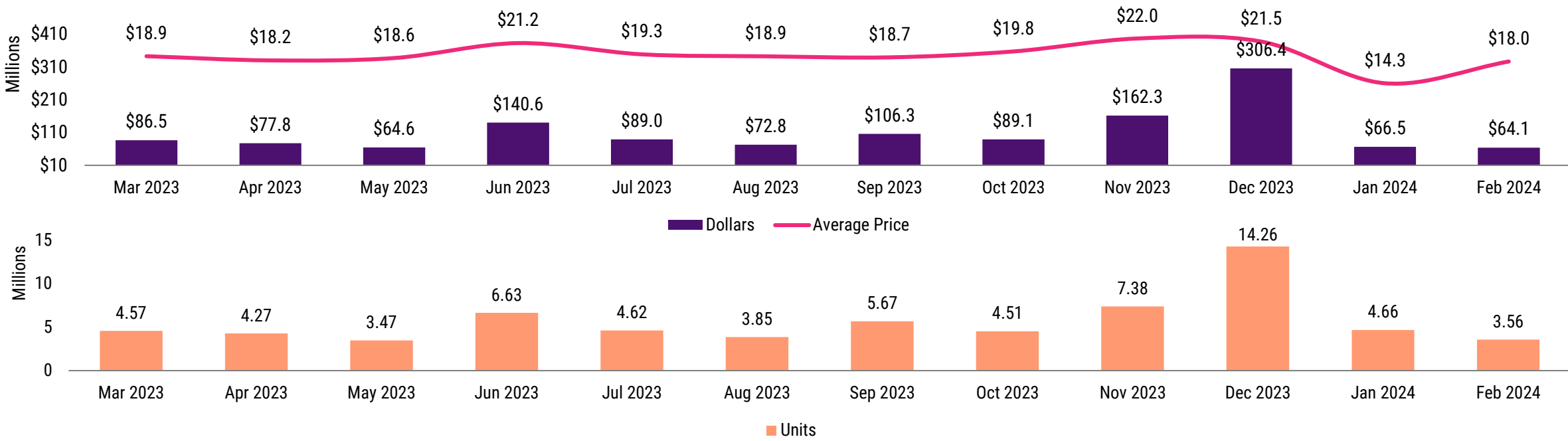
February 2024 experienced a decline by -2% vs. 2023, units declined by -3% and average price at flat. 6 categories grew this month, Building Sets which was the top dollar made category grew +23%, Vehicles grew +7%, Youth Electronics grew +26%, Explorative & Other Toys grew +5%, Games/Puzzles and Plush grew +1%. The top 3 declining categories were Outdoor & Sports Toys declined -28%, Infant/Toddler/Preschool Toys declined -20% and Drawing & Crafts Supplies declined -27%. For YTD February, total dollars declined -7% (Meanwhile global declined -2%).



Monthly Trend

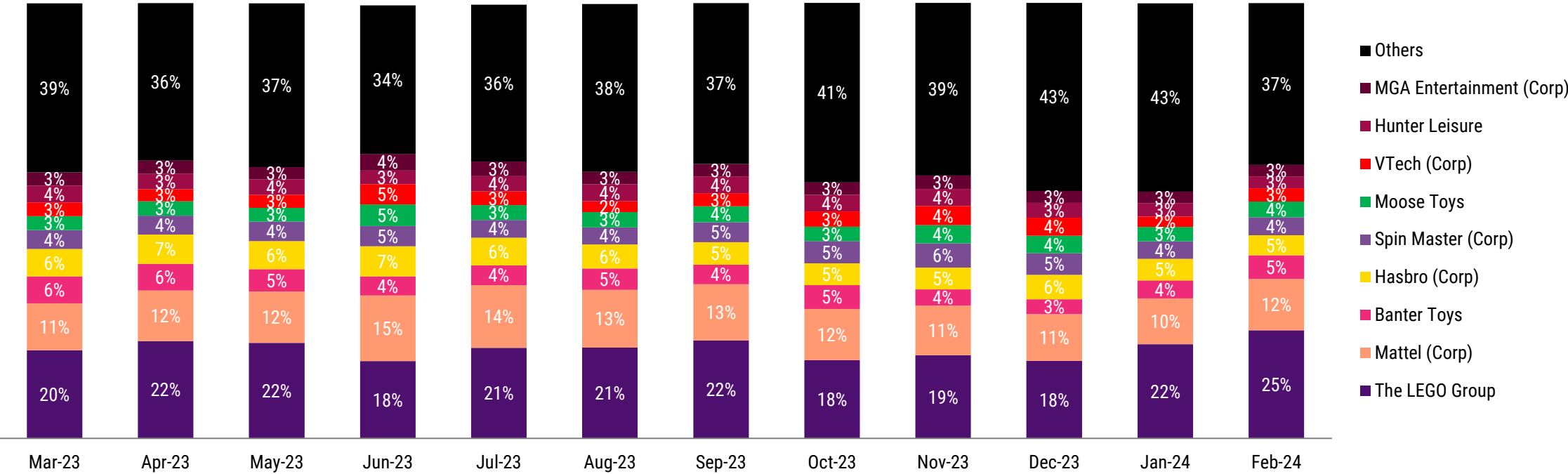
For February 2024, Building Sets (+23%) was the largest dollar made category followed by Infant/Toddler/Preschool Toys (-20%), Dolls (-4%), Games/Puzzles (+1%) and Outdoor & Sports Toys (-28%). Unlicensed toys average price was up by +3% and licensed toys was down -7% resulting in total toys average price for the month at a flat.

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



Corporate Manufacturers Trends

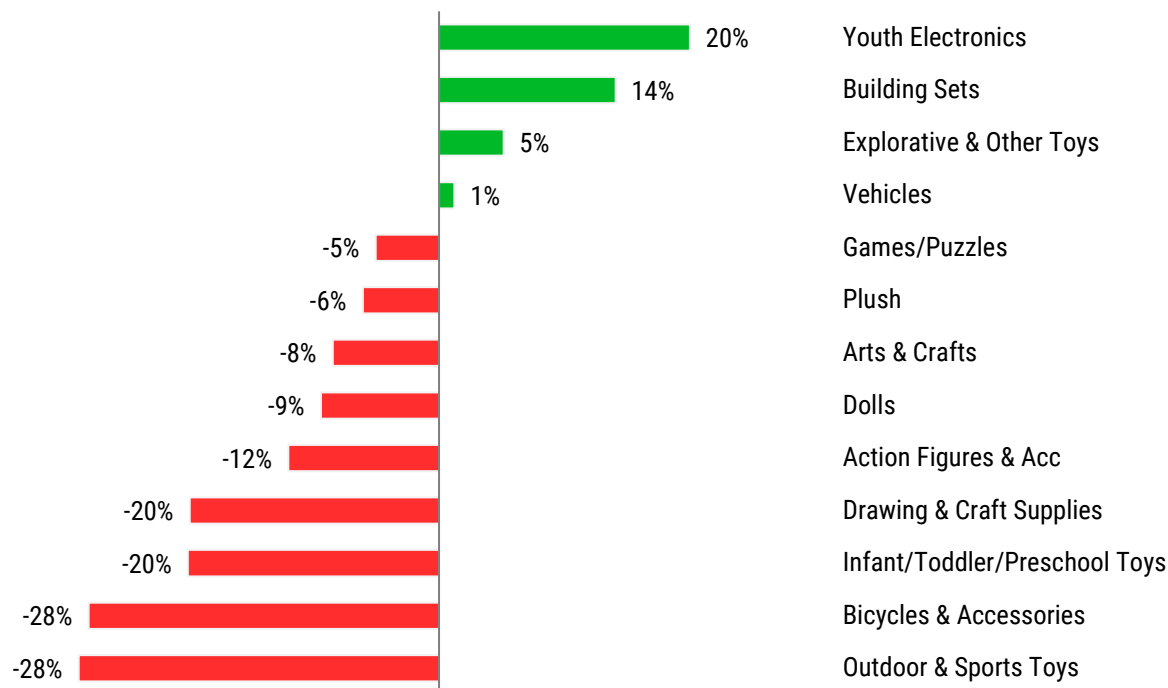
LEGO was the top dollar made corporate manufacturer and the largest dollar growth in February 2024, gained 5 share points vs. YGO followed by Mattel gained 2 share points and Banter Toys remained same shares. The top 3 leading dollar made properties for this month were Pokémon, LEGO Icons and Barbie. For YTD February, the largest dollar gaining properties were LEGO Icons, TMNT and Sonic The Hedgehog. The top 3 dollar gaining corporate manufacturers for YTD February are LEGO, Mattel and Zuru.



Category Trends

For February 2024, 6 categories grew which were Building sets (+23%) driven from LEGO Icons and Speed Champions followed by Vehicles (+7%) driven from Hot Wheels and Cars The Movies, Youth Electronics (+26%) driven from Robo Alive and Bitzee, Explorative & Other Toys (+5%) driven from Miniverse and Rainbocorns, Game/Puzzles (+1%) from Super Mario Brothers and Plush (+1%) from Aphmau and Care Bears. Meanwhile Outdoor & Sports Toys which continued to be the most declined category was down -28%.

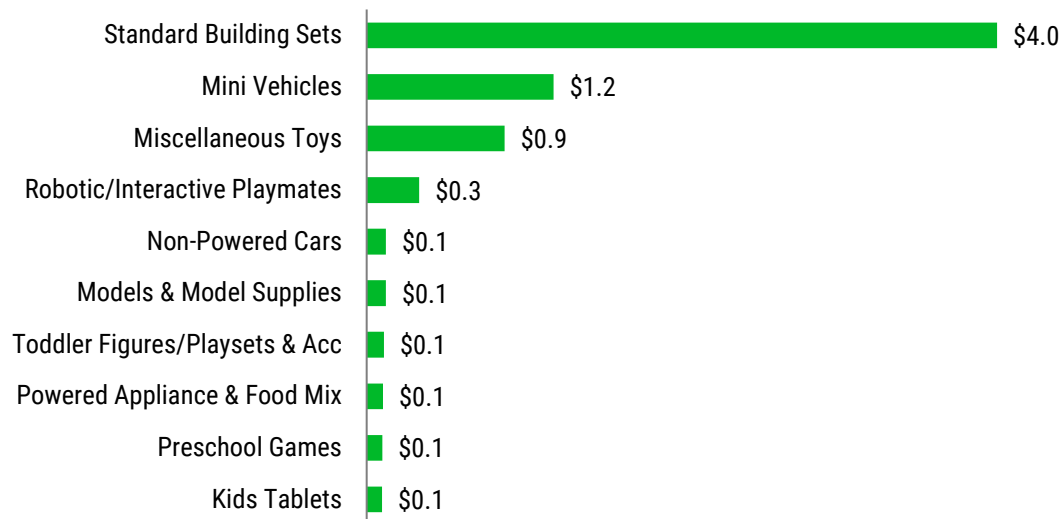
% Value Change YTD



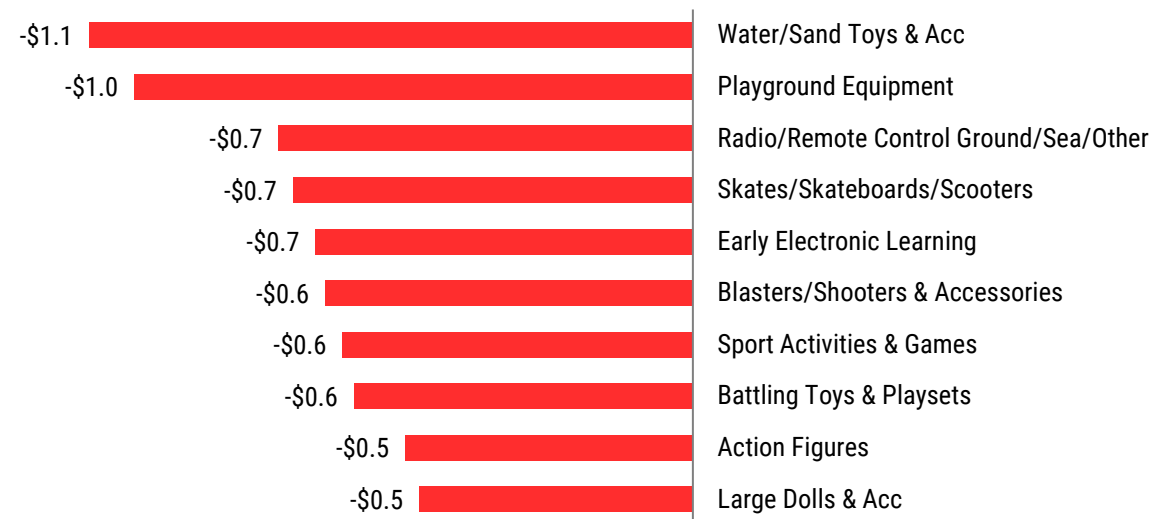
Subclass Trends

The top 3 subclass gainers this month are Standard Building Sets (+25%) driven from LEGO Icons, Speed Champions and Disney Classic, followed by Mini Vehicles (+35%) driven from Hot Wheels and Cars The Movies and Miscellaneous Toys (+44%) driven from Miniverse and Rainbocorns. Playground Equipment was the most declining subclass (-66%) from unbranded/unlicensed toys.

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



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



Property Trends

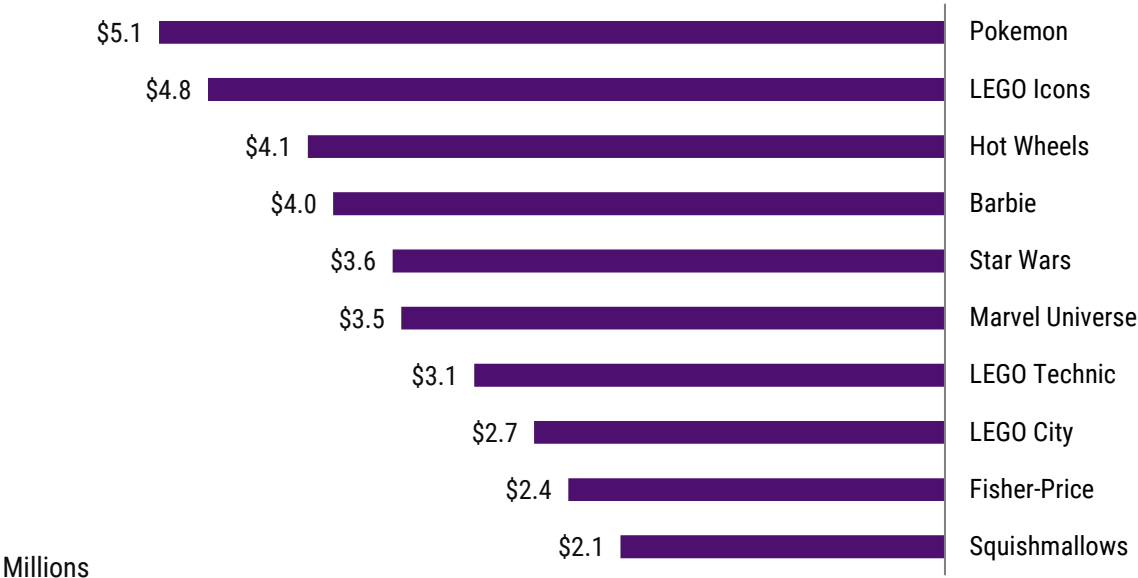
Top 5 dollar made properties February '24

- #1 – Pokémon
- #2 – LEGO Icons
- #3 – Barbie
- #4 – Hot Wheels
- #5 – Marvel Universe

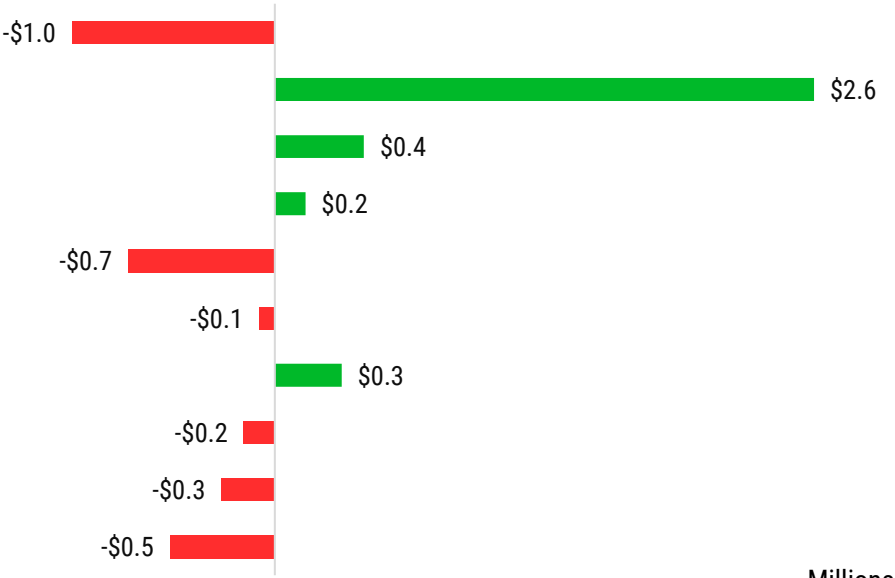
Top 5 dollar gaining properties February '24 vs. February '23

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

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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