

ATA Report

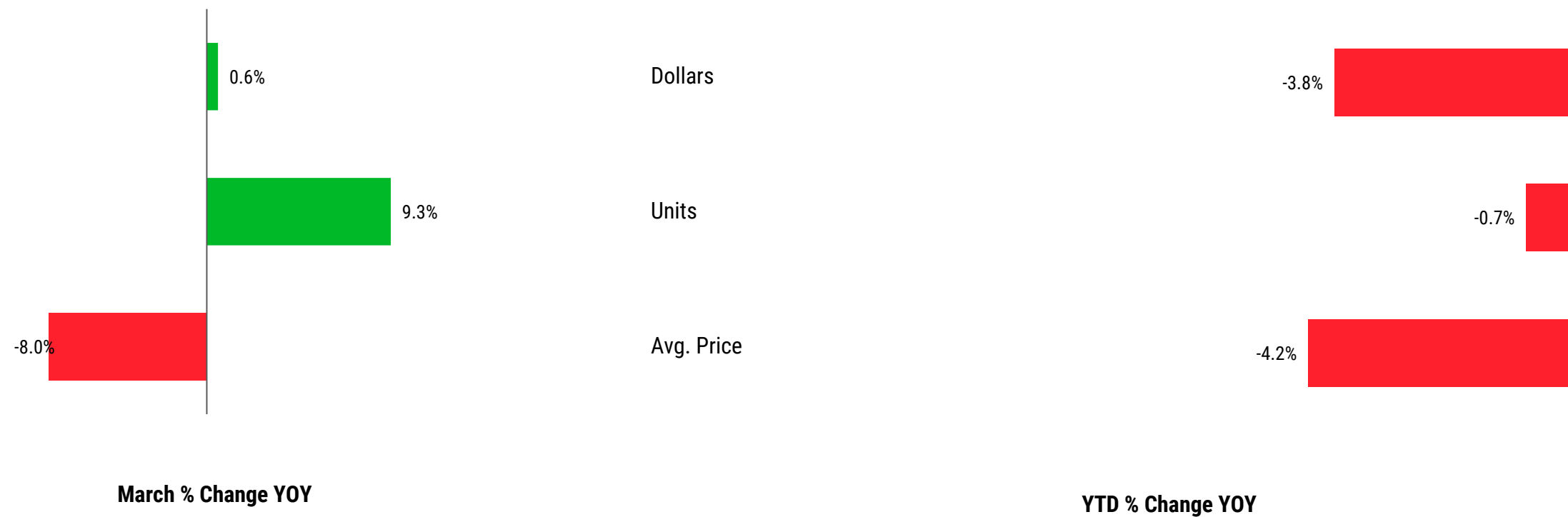
Mar 2024

Australia Toy Association



Industry Trends

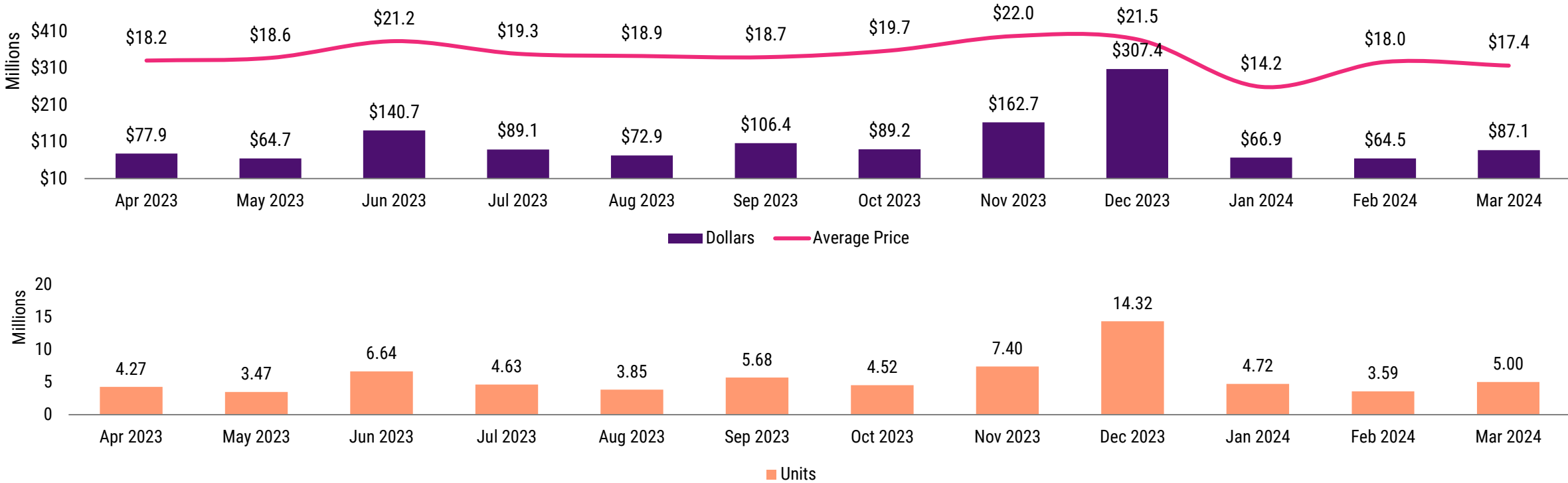
March 2024 experienced a positive +1% dollars growth, units grew +9% which resulted the average price down by -8%. 5 categories grew this month, Building Sets was the top dollar gainer +23%, followed by Vehicles +13%, Explorative & Other Toys +9%, Games/Puzzles +3% and Youth Electronics +10%. The top 3 declining categories were Infant/Toddler/Preschool Toys -17%, Outdoor & Sports Toys -22% and Action Figures -5%. For YTD March 2024 total dollars was down by -4% in dollars (Meanwhile globally was up +3% in dollars).



Monthly Trend

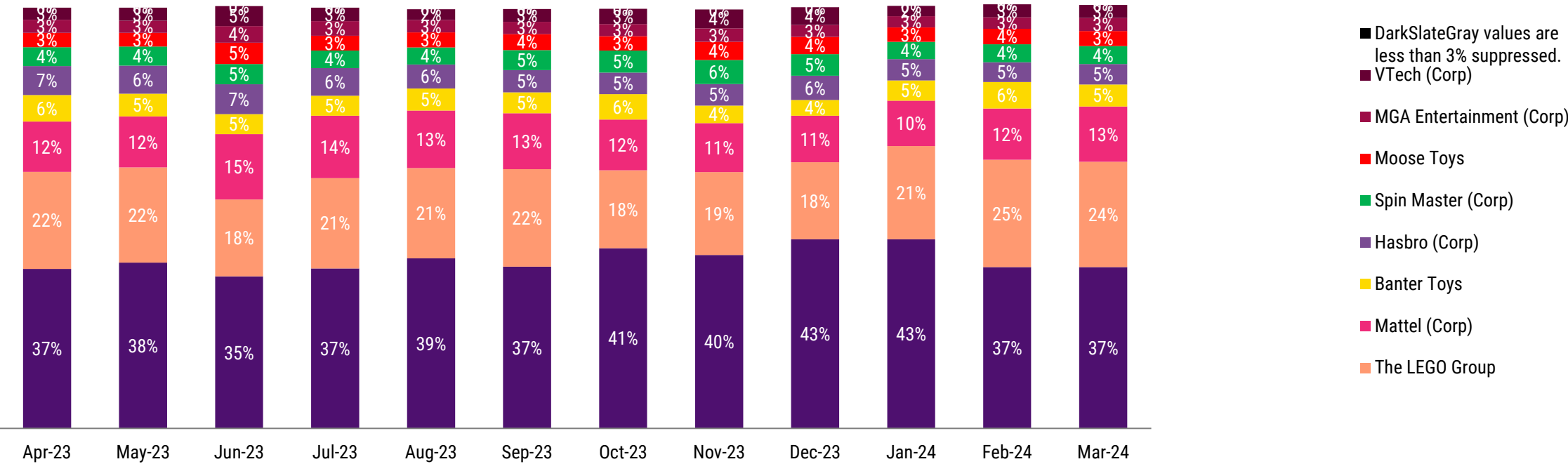
For March 2024, Building Sets (+23%) was still the largest dollar made category followed by Infant/Toddler/Preschool Toys (-17%), Dolls (-2%), Games/Puzzles (+3%) and Vehicles (+13%). Average price was \$18.94 and now down -8% at \$17.43 driven from both licensed and unlicensed toys.

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



Corporate Manufacturers Trends

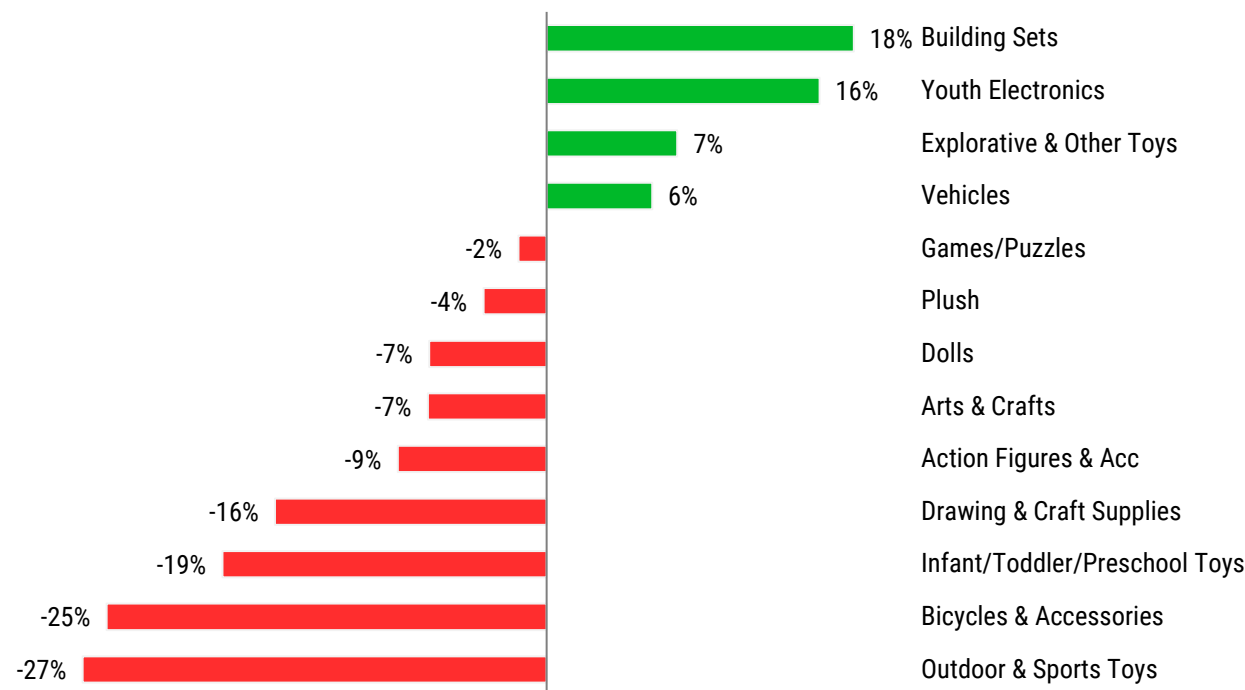
LEGO remains the top dollar made corporate manufacturer and the largest dollar gainer in March 2024, gained 4 share points vs. YGO followed by Mattel and Banter Toys. The top 3 leading dollar made properties in March were Hot Wheels, Pokémon and Barbie. For YTD March 2024, the 3 largest dollar gaining properties were from LEGO properties: LEGO Icons, LEGO Disney Classic and LEGO Technic. The top 3 dollar gaining corporate manufacturer for YTD were LEGO, Mattel and Zuru.



Category Trends

For March 2024, 5 categories grew which were Building Sets (+23%) driven from LEGO Technic, LEGO Icons and LEGO Disney Classic followed by Vehicles (+13%) driven from Hot Wheels, Explorative Toys (+9%) driven from Miniverse, Games/Puzzles (+3%) driven from One Piece and Monopoly and Youth Electronics (+10%) from Bitzee, Robo Alive and LeapPad Tablet. Meanwhile Infant/toddler/preschool toys suffered the most decline -17%.

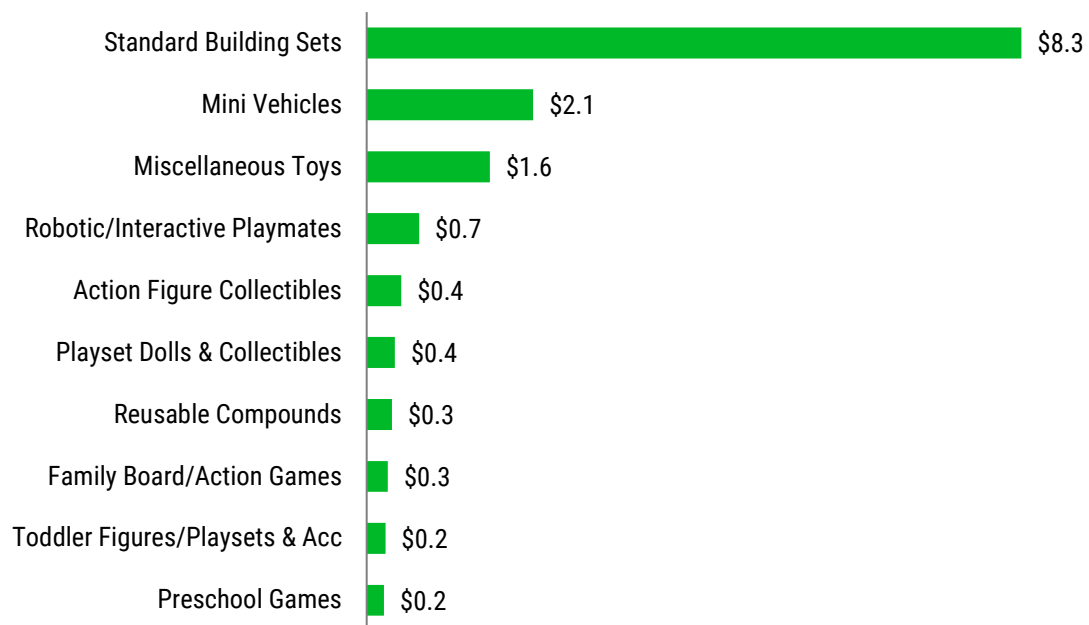
% Value Change YTD



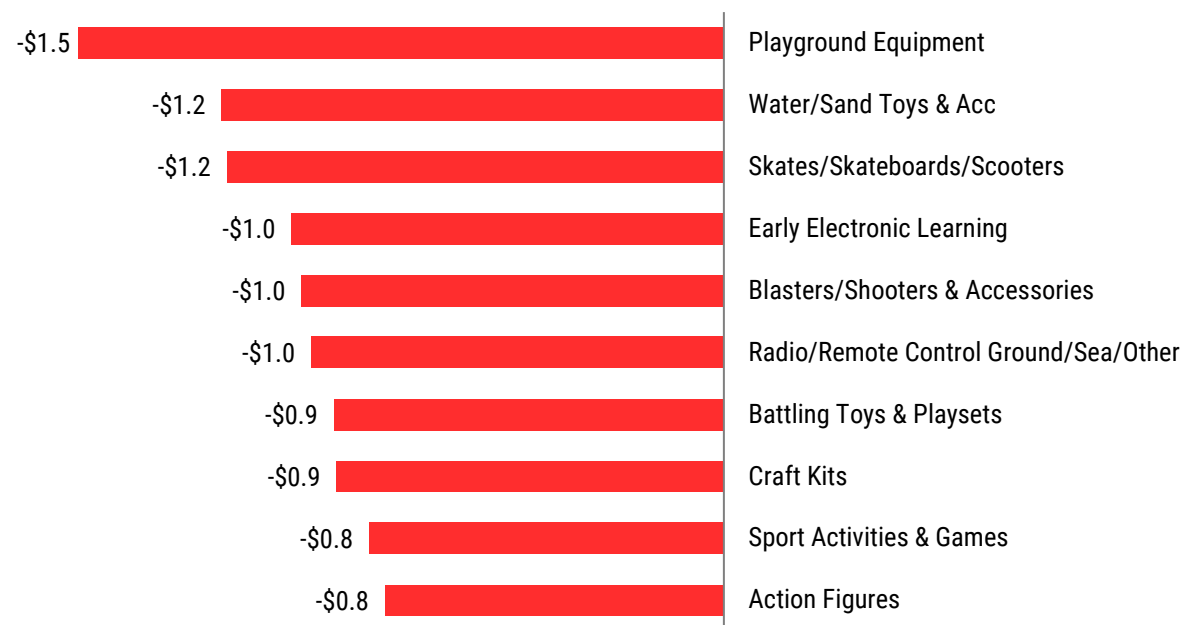
Subclass Trends

Similarly to last month, the top 3 subclass gainers this month were Standard Building Sets (+26%) driven from LEGO Technic, LEGO Icons and LEGO Disney Classic, followed by Mini Vehicles (+43%) from Hot Wheels and Miscellaneous Toys (+42%) from Miniverse. Playground Equipment continues to be the most declining subclass down by -64%

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



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



Property Trends

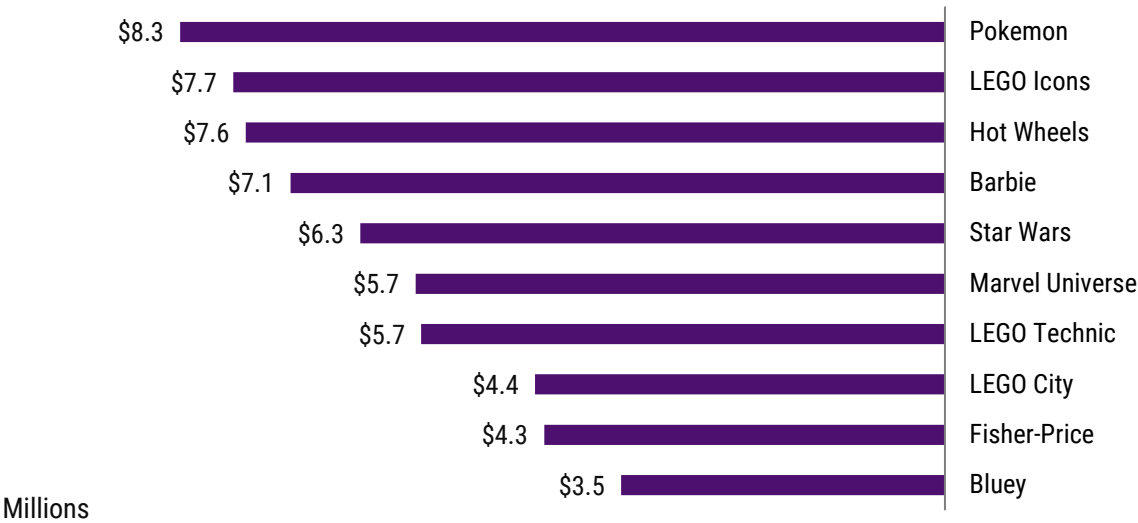
Top 5 dollar made properties March '24

- #1 – Hot Wheels
- #2 – Pokémon
- #3 – Barbie
- #4 – Star Wars
- #5 – LEGO Technic

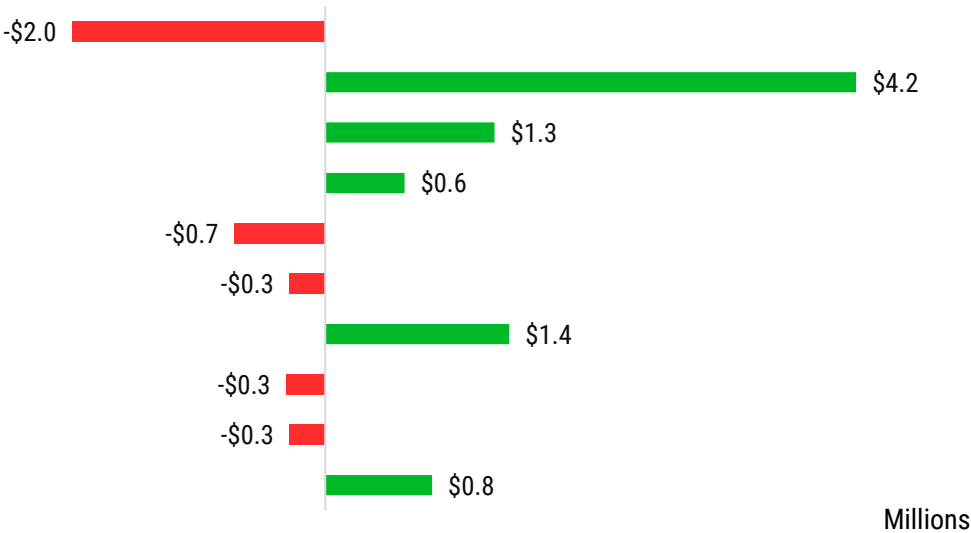
Top 5 dollar gaining properties March '24 vs. March '23

- #1 – LEGO Technic
- #2 – LEGO Icons
- #3 – Hot Wheels
- #4 – LEGO Disney Classic
- #5 – LEGO Harry Potter

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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