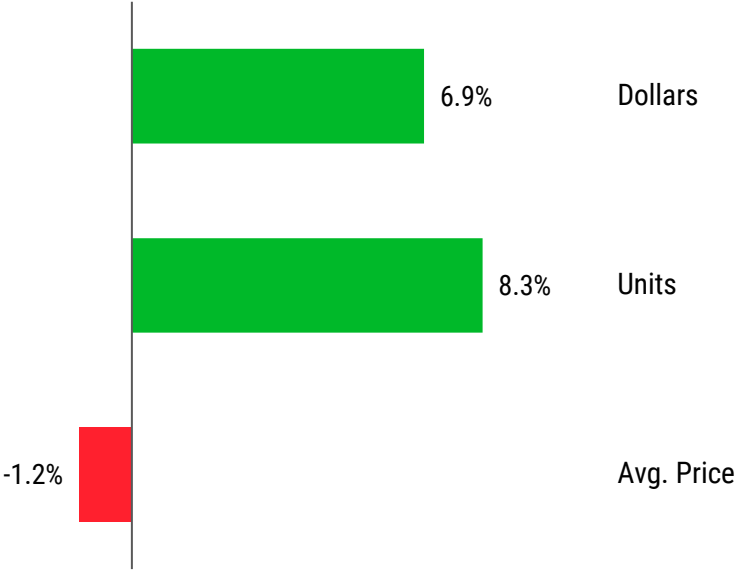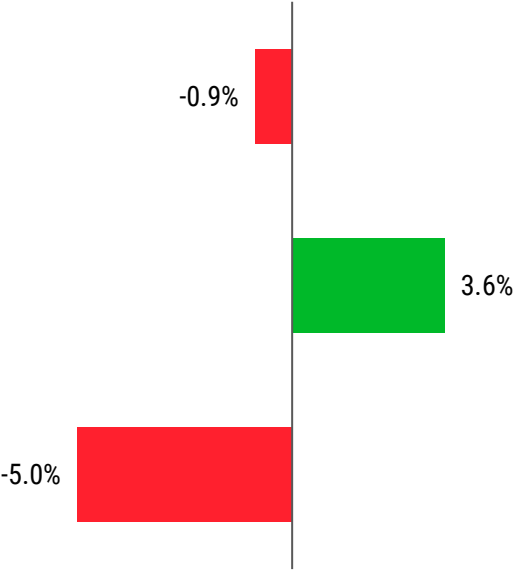# ATA Report

Jun 2024

Australia Toy Association

Industry Trends

June 2024 experienced a growth of +7% in dollars and units grew +8% resulted in a -1% decline for average price. 6 categories grew, Building sets continues to be the largest gainer (+30%), followed by Games/Puzzles (+16%), Youth Electronics (+41%), Plush (+8%), Vehicles (+7%) and Explorative & Other Toys (+6%). The top 3 declined categories were Infant/Toddler/Preschool Toys (-3%), Bicycles (-41%) and Arts & Crafts (-10%). The YTD June 2024, dollars was just slightly down by -1% (similarly with global average also down by -1%).
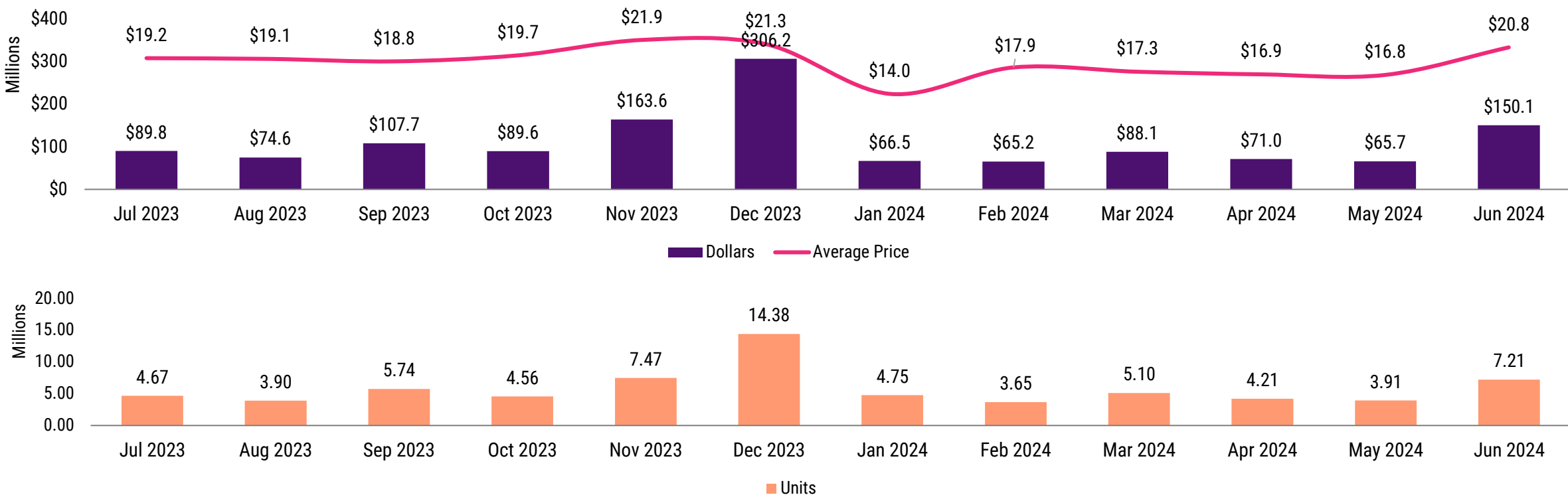
	June % Change YOY		YTD % Change YOY
Dollars	6.9%		-0.9%
Units	8.3%		3.6%
Avg. Price	-1.2%		-5.0%

June % Change YOY
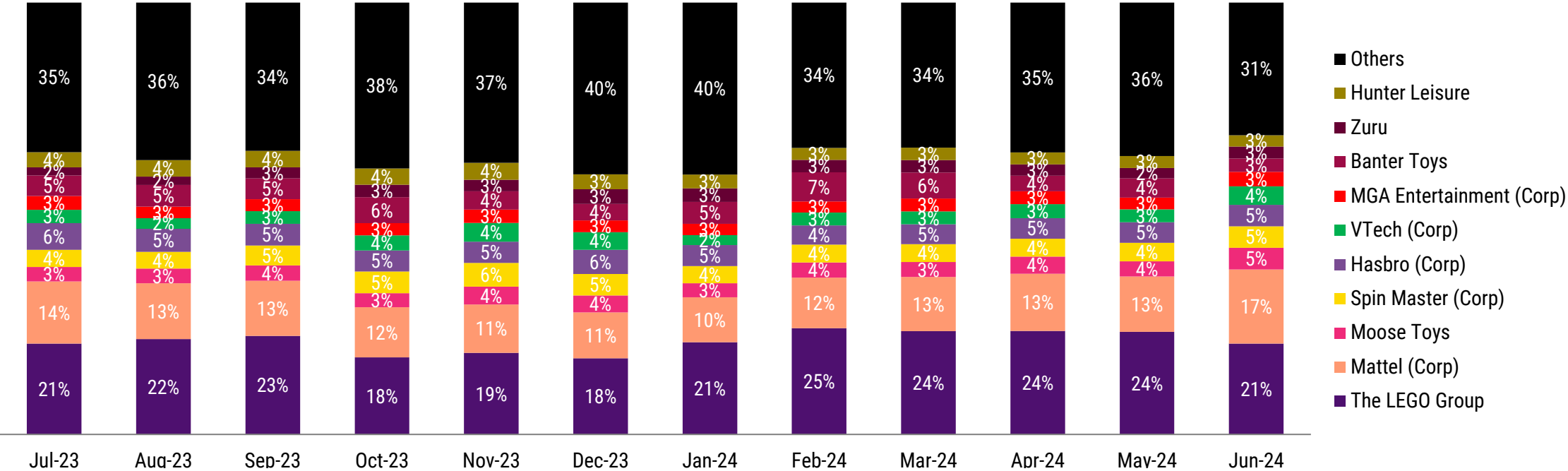
YTD % Change YOY

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Monthly Trend

For June 2024, Buildings Sets (+30%) remained as the largest dollar category followed by Infant/Toddler/Preschool Toys (-3%), Dolls (-1%), Plush (+8%), Vehicles (+7%) and Games/Puzzles (+16%). Average price was $21.08 in June 2023 and dropped -1% to $20.82 driven from licensed toys.

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

Month	Average Price	Dollars
Jul 2023	$19.2	$89.8
Aug 2023	$19.1	$74.6
Sep 2023	$18.8	$107.7
Oct 2023	$19.7	$89.6
Nov 2023	$21.9	$163.6
Dec 2023	$21.3	$306.2
Jan 2024	$14.0	$66.5
Feb 2024	$17.9	$65.2
Mar 2024	$17.3	$88.1
Apr 2024	$16.9	$71.0
May 2024	$16.8	$65.7
Jun 2024	$20.8	$150.1

Legend: Dollars, Average Price

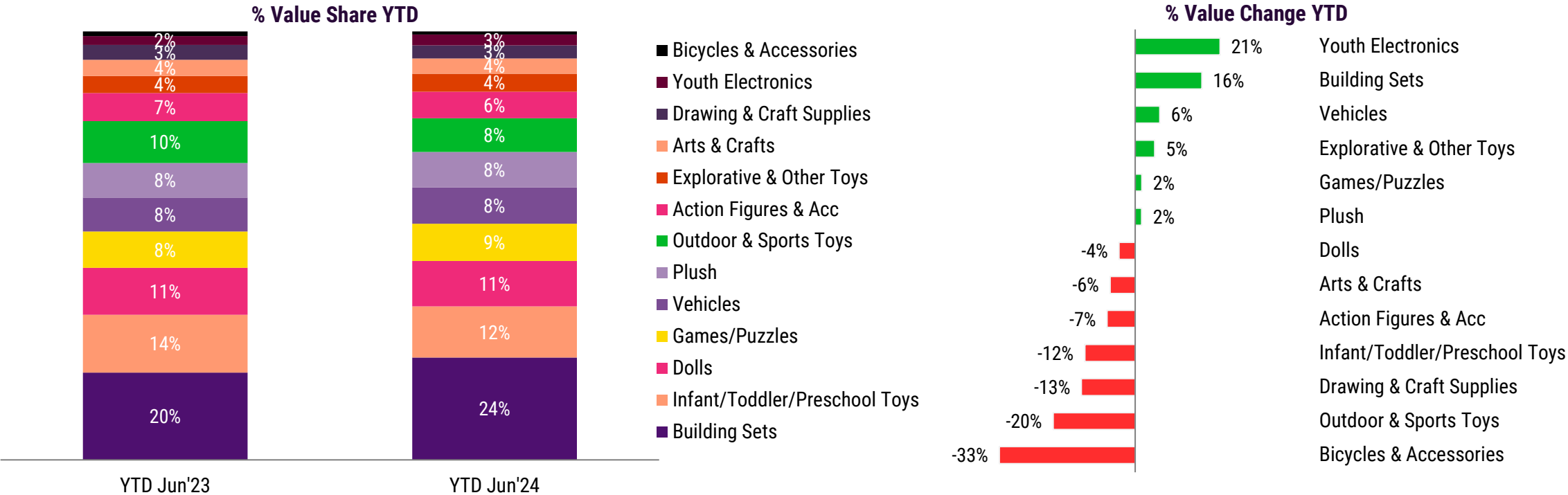| Month	Units
Jul 2023	4.67
Aug 2023	3.90
Sep 2023	5.74
Oct 2023	4.56
Nov 2023	7.47
Dec 2023	14.38
Jan 2024	4.75
Feb 2024	3.65
Mar 2024	5.10
Apr 2024	4.21
May 2024	3.91
Jun 2024	7.21

Legend: Units

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Corporate Manufacturers Trends

In June 2024, LEGO was the largest dollar corporate manufacturer and gained 3 share points compared to June 2023. The top 3 dollar gaining corporate manufacturers for this month were LEGO, Mattel and Zuru. The top 3 leading dollar properties in June 2024 were Barbie, Hot Wheels and Fisher-Price. For YTD June 2024, the top 3 dollar gaining properties continues to be LEGO Icons, LEGO Technic, and LEGO Disney Classic. The top 3 dollar gaining corporate manufacturers for YTD June 2024 continues to be LEGO, Mattel and Zuru. Outside the top 10 ranked by dollar for YTD June 2024, Headstart moved up in rankings to #12.

Legend:
- Others
- Hunter Leisure
- Zuru
- Banter Toys
- MGA Entertainment (Corp)
- VTech (Corp)
- Hasbro (Corp)
- Spin Master (Corp)
- Moose Toys
- Mattel (Corp)
- The LEGO Group
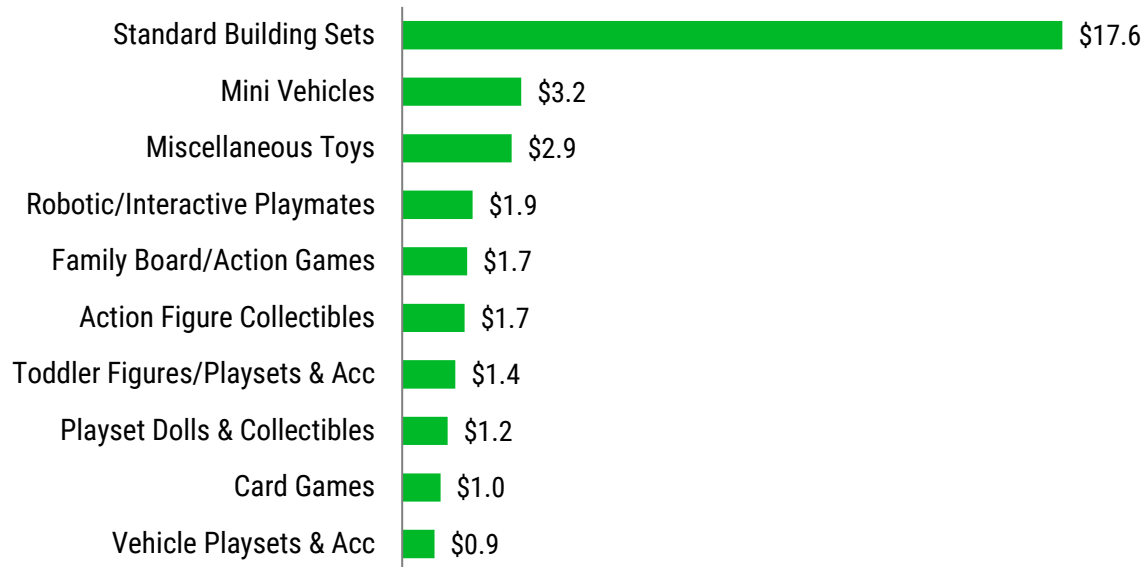
Toys Australia YTD Jun 2024

Category Trends

For YTD June 2024, 6 categories grew, these same categories also grew in the month of June 2024 vs. LY, Building Sets grew (+30%) driven by LEGO Icons and MEGA Pokémon, Games/Puzzles grew (+16%) driven by UNO and Monopoly, Youth Electronics (+41%) driven by LeapPad Tablet and Bitzee, Plush grew (+8%) driven by Furby and Rainbocorns, Vehicles grew (+7%) driven by Teamsterz and Hot Wheels and Explorative & Other Toys (+6%) driven by Miniverse. Meanwhile Infant/Toddler Preschool toys continued to drop -3%.

% Value Share YTD

Category	YTD Jun'23	YTD Jun'24
Bicycles & Accessories	2%	3%
Youth Electronics	3%	3%
Drawing & Craft Supplies	4%	4%
Arts & Crafts	4%	4%
Action Figures & Acc	7%	6%
Outdoor & Sports Toys	10%	8%
Plush	8%	8%
Vehicles	8%	8%
Games/Puzzles	8%	9%
Dolls	11%	11%
Infant/Toddler/Preschool Toys	14%	12%
Building Sets	20%	24%

% Value Change YTD

Category	% Value Change
Youth Electronics	21%
Building Sets	16%
Vehicles	6%
Explorative & Other Toys	5%
Games/Puzzles	2%
Plush	2%
Dolls	-4%
Arts & Crafts	-6%
Action Figures & Acc	-7%
Infant/Toddler/Preschool Toys	-12%
Drawing & Craft Supplies	-13%
Outdoor & Sports Toys	-20%
Bicycles & Accessories	-33%

Subclass Trends

The top 3 subclass gainers this month were Standard Building Sets (+7%) driven by LEGO Icons and MEGA Pokémon, Family Board/Action Games (+87%) driven by Monopoly and Robotic/Interactive Playmates (+86%) driven by Bitzee. Action Figures was the most declined subclass down by -23%.

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

Subclass	Value
Standard Building Sets	$17.6
Mini Vehicles	$3.2
Miscellaneous Toys	$2.9
Robotic/Interactive Playmates	$1.9
Family Board/Action Games	$1.7
Action Figure Collectibles	$1.7
Toddler Figures/Playsets & Acc	$1.4
Playset Dolls & Collectibles	$1.2
Card Games	$1.0
Vehicle Playsets & Acc	$0.9

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

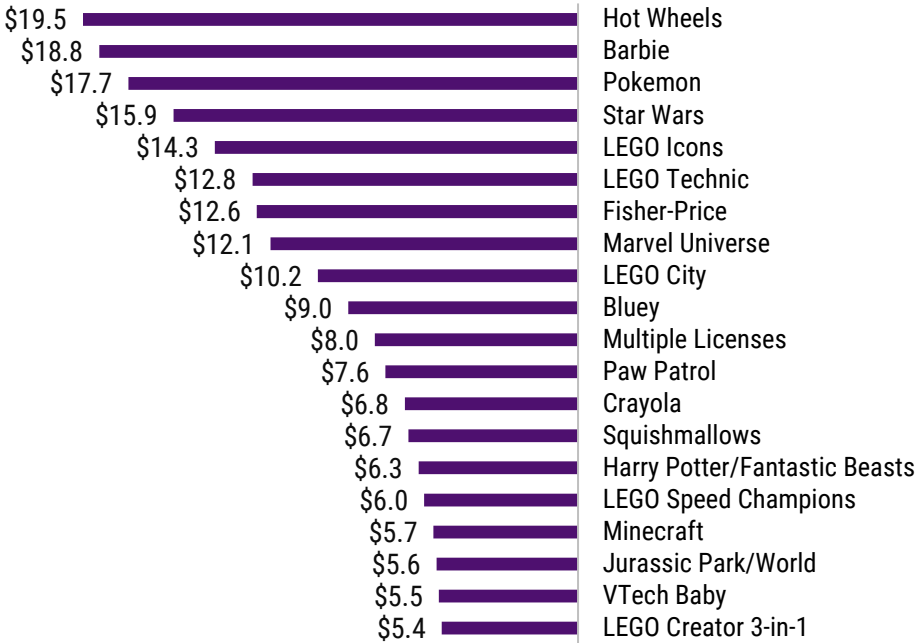| Value	Subclass
-$2.6	Strategic Trading Card Games
-$2.5	Action Figures
-$2.3	Blasters/Shooters & Accessories
-$2.1	Playground Equipment
-$2.1	Fashion Accessories
-$1.9	Battling Toys & Playsets
-$1.8	Bicycles
-$1.8	Skates/Skateboards/Scooters
-$1.6	Radio/Remote Control Ground/Sea/Other
-$1.6	Craft Kits

Toys Australia YTD Jun 2024

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Property Trends

Top 5 Dollar Properties June'24

#1 – Barbie
#2 – Hot Wheels
#3 – Fisher-Price
#4 – Pokémon
#5 – Star wars

Top 5 Dollar Gaining Properties June '24 vs. June '23

#1 – Despicable Me/Minions
#2 – LEGO Icons
#3 – Fisher-Price
#4 – Furby
#5 – MEGA Pokémon

Top 20 Properties YTD

Property	Value
Hot Wheels	$19.5
Barbie	$18.8
Pokemon	$17.7
Star Wars	$15.9
LEGO Icons	$14.3
LEGO Technic	$12.8
Fisher-Price	$12.6
Marvel Universe	$12.1
LEGO City	$10.2
Bluey	$9.0
Multiple Licenses	$8.0
Paw Patrol	$7.6
Crayola	$6.8
Squishmallows	$6.7
Harry Potter/Fantastic Beasts	$6.3
LEGO Speed Champions	$6.0
Minecraft	$5.7
Jurassic Park/World	$5.6
VTech Baby	$5.5
LEGO Creator 3-in-1	$5.4

Millions

$ Value Change vs YAG

Change
$2.1
-$0.1
-$4.2
-$1.0
$6.3
$2.7
$1.3
-$1.5
-$0.1
$2.0
$2.7
$0.8
-$0.5
-$2.8
$0.2
$1.0
-$0.6
-$1.2
-$0.7
$1.1

Millions

Toys Australia YTD Jun 2024

For more information

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