

ATA Report

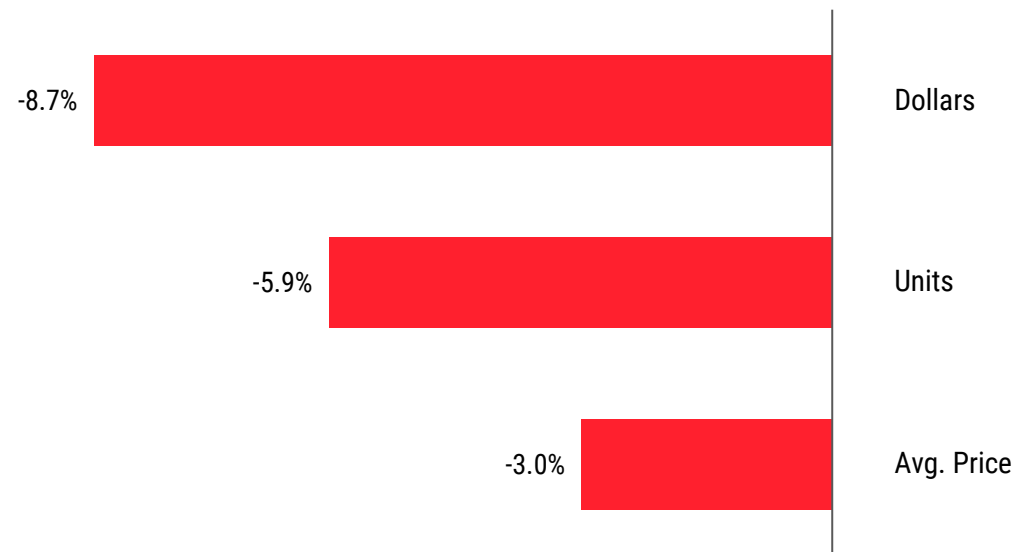
Jul 2024

Australia Toy Association

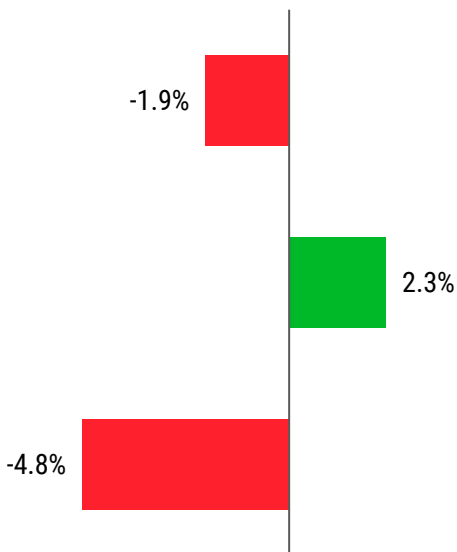


Industry Trends

July 2024 experienced a decline of -9% in dollars and units dropped -6% resulted in a -3% decline for average price. Only 3 categories grew, Building Sets continues to be the largest gainer (+13%), followed by Games/Puzzles (+7%), Youth Electronics (+10%). The top 3 declined categories were Dolls (-25%), Infant/Toddler/Preschool Toys (-18%) and Outdoor & Sports Toys (-21%). The YTD July 2024, dollars was down by -2% (Globally Toys was down by -1%).



July % Change YOY

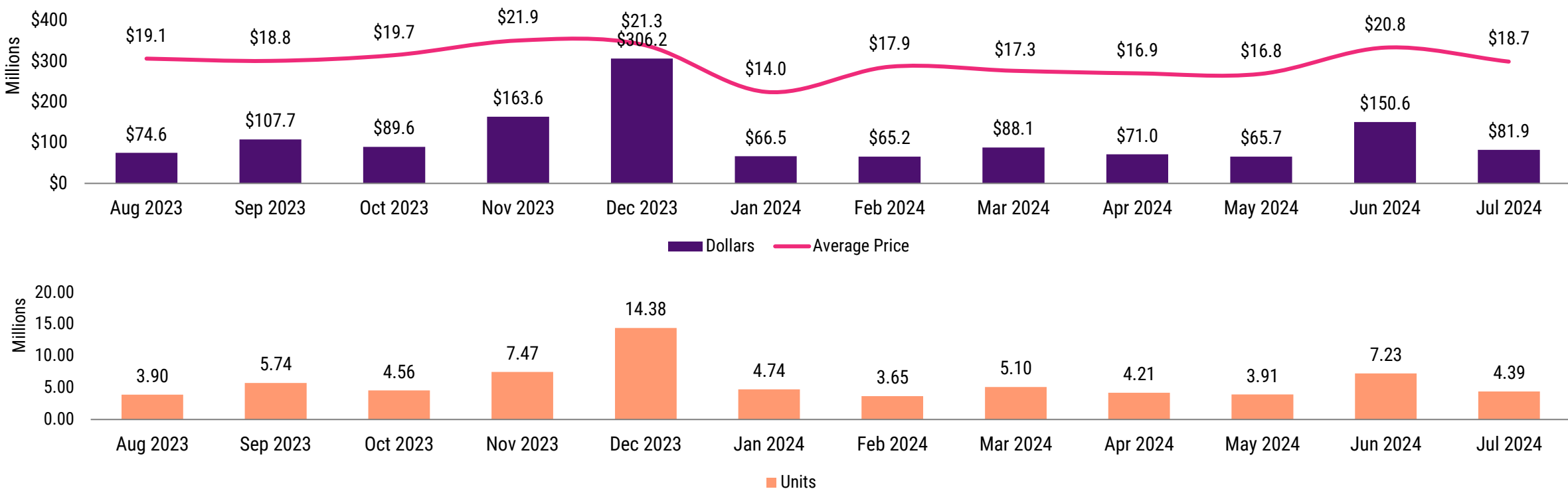


YTD % Change YOY

Monthly Trend

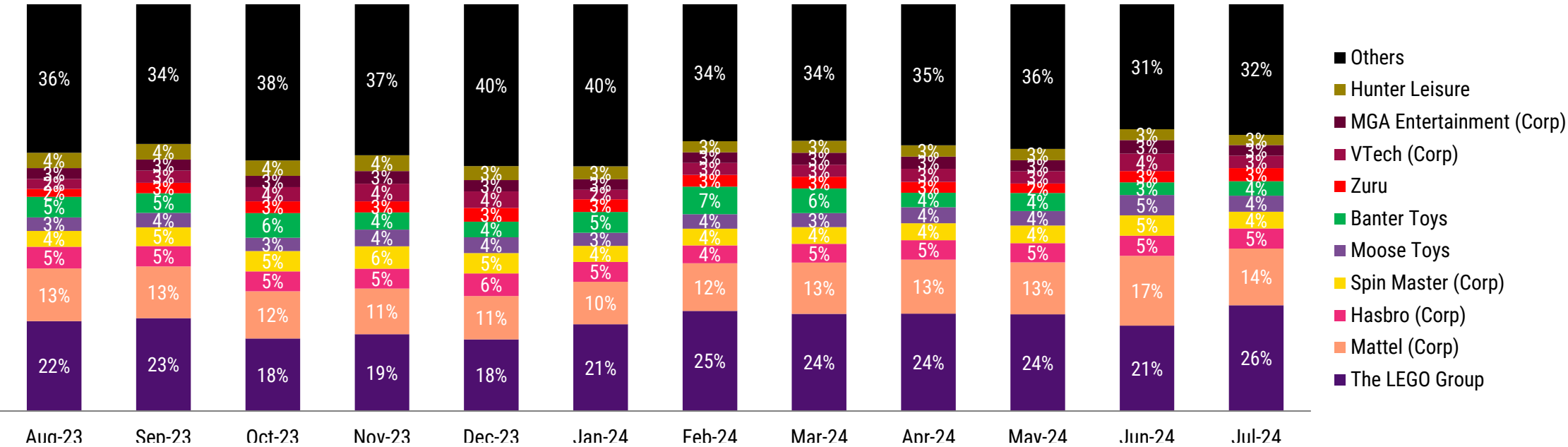
For July 2024, Building Sets (+13%) remained as the largest dollar category followed by Infant/Toddler/Preschool Toys (-18%), Dolls (-25%), Games/Puzzles (+7%), Vehicles (-12%) and Plush (-12%). Average price was \$19.24 in July 2023 and dropped -3% to \$18.67 driven from both licensed and unlicensed toys.

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



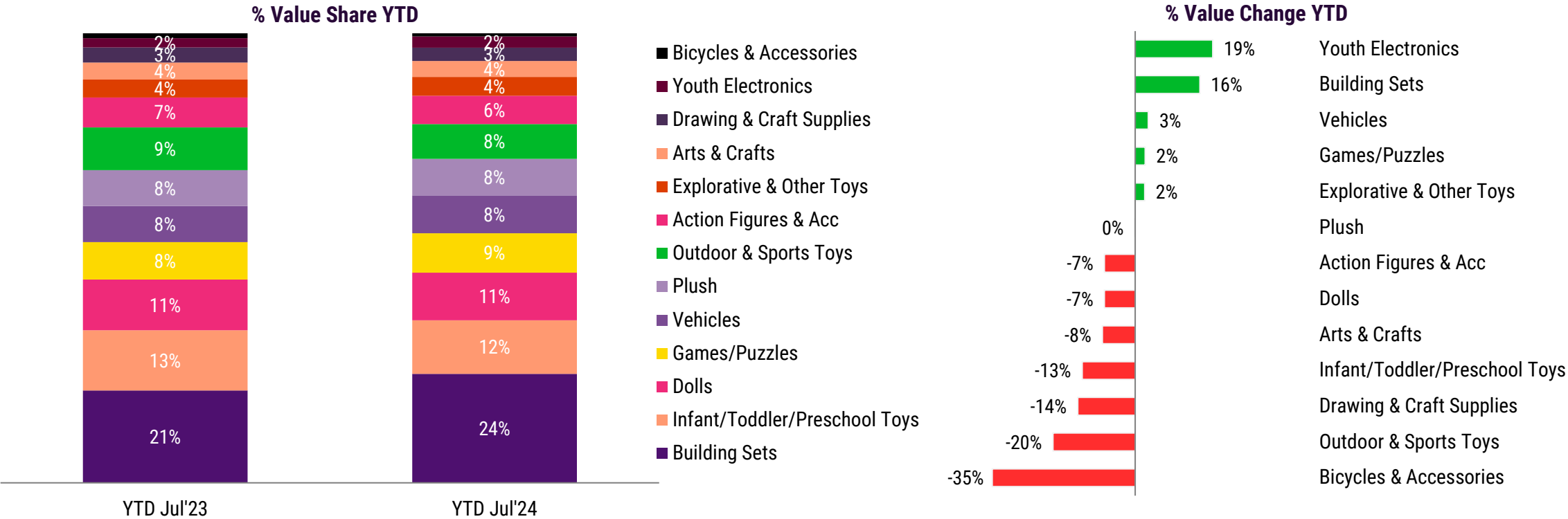
Corporate Manufacturers Trends

In July 2024, LEGO was the largest dollar corporate manufacturer and gained 5 share points compared to July 2023. The top 3 dollar gaining corporate manufacturers for this month were LEGO, Zuru and Jazwares. The top 3 leading dollar properties in July 2024 were Star Wars, Barbie and Hot Wheels. For YTD July 2024, the top 3 dollar gaining properties LEGO Icons, Despicable Me/Minions and LEGO Disney Classic, and LEGO Technic which was previously in the top 3 last month moved down to #4. The top 3 dollar gaining corporate manufacturers for YTD July 2024 continues to be LEGO, Mattel and Zuru. Outside the top 10 ranked by dollar for YTD July 2024, Jazwares remain flat at #11 and Headstart stays at #12.



Category Trends

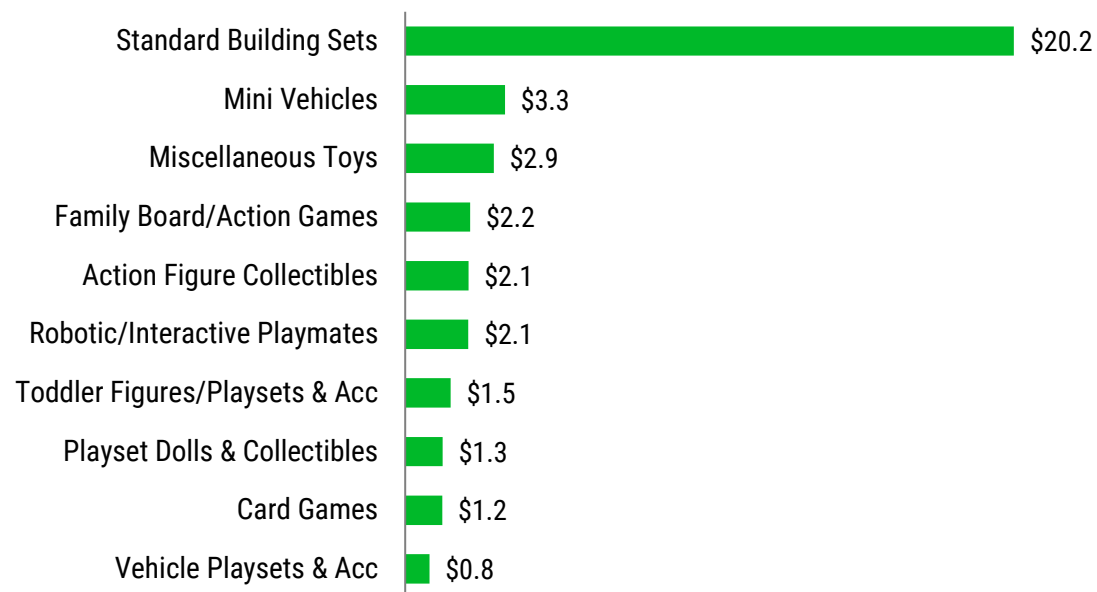
For YTD July 2024, 5 categories grew, however for the month of July 2024, only 3 categories grew compared to LY, Building Sets (+13%) driven by LEGO Star Wars, Mercedes-Benz and LEGO Icons, Games/Puzzles (+7%) driven by UNO, One Piece and Monopoly, Youth Electronics (+10%) driven by Bitzee, LeapPad tablet and Robo Alive. Meanwhile Dolls experienced a -25% decline for the month.



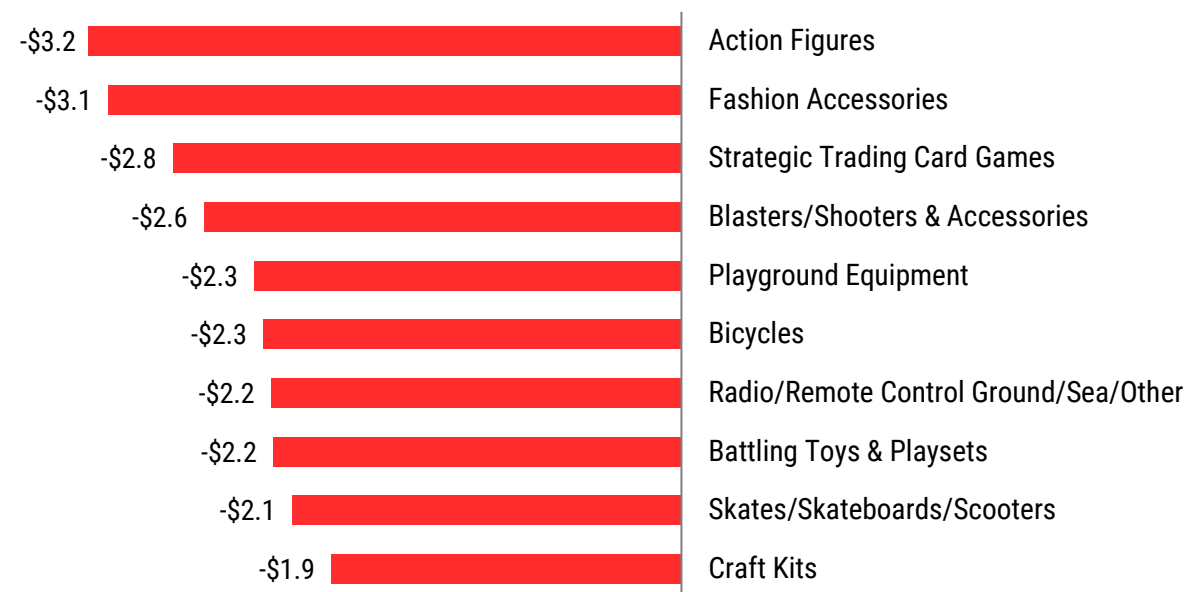
Subclass Trends

The top 3 subclass gainers this month were Standard Building Sets (+15%) driven by LEGO Star Wars, Mercedes-Benz and LEGO Icons, Family Board/Action Games (+36%) driven by Monopoly and Action Figure Collectibles (+34%) driven by Smashers, Rainbow Friends, Despicable Me/Minions. Fashion Dolls (-32%) was the most declined subclass.

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



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



Property Trends

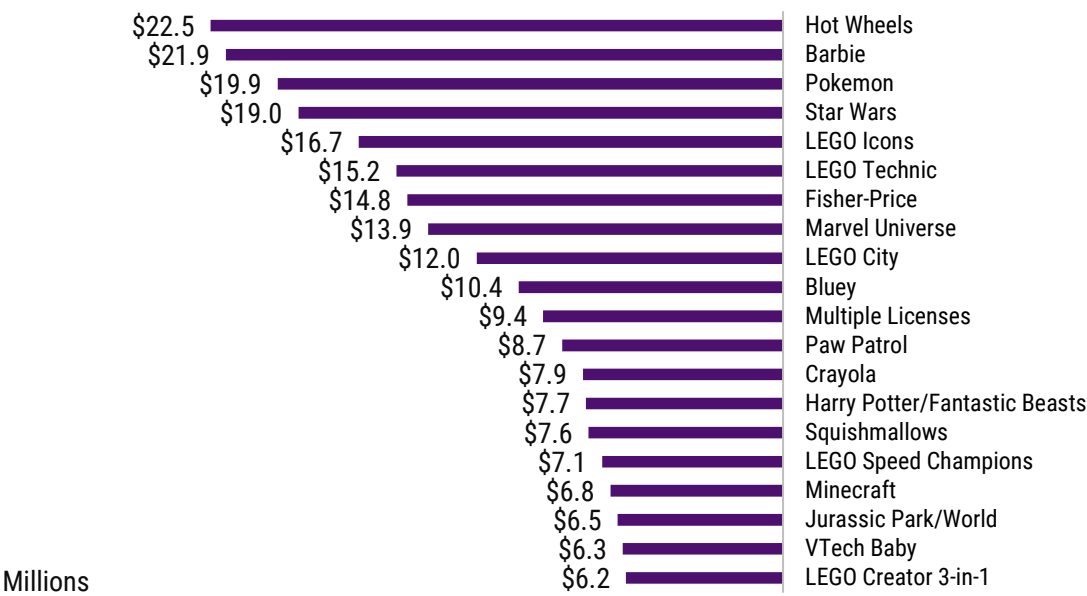
Top 5 Dollar Properties July'24

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

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

- #1 – Despicable Me/Minions
- #2 – LEGO Star Wars
- #3 – LEGO Icons
- #4 – Mercedes-Benz
- #5 – LEGO Ideas

Top 20 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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