

ATA Report

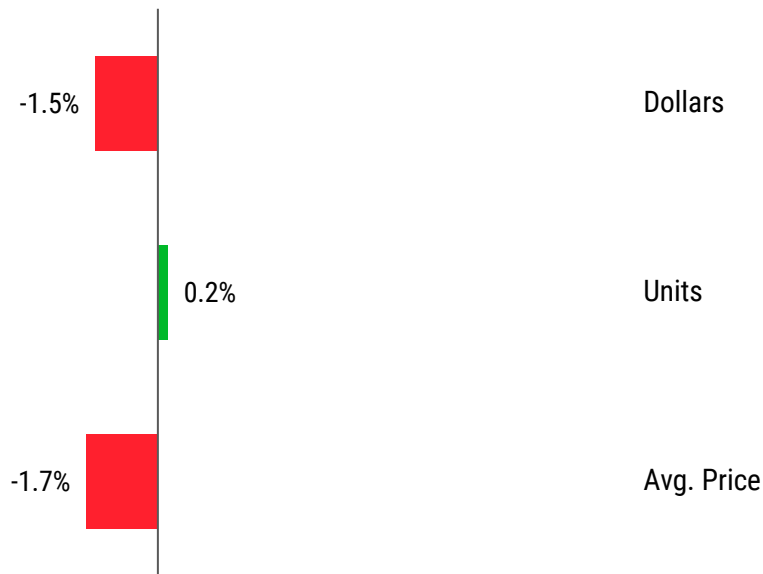
Aug 2024

Australia Toy Association

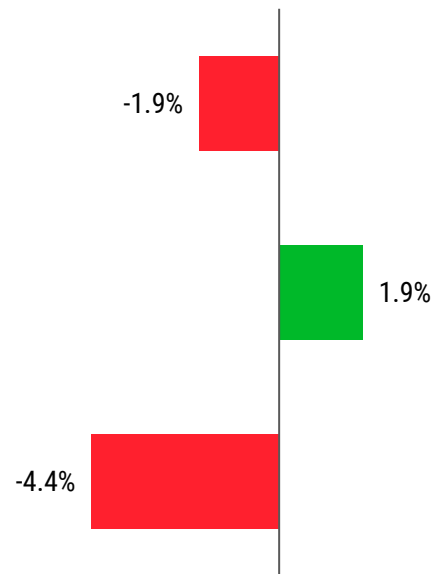


Industry Trends

August 2024 experienced a decline -2% in dollars, flat in units and average price declined -2%. 5 categories grew, Building Sets continues to be the largest gainer (+22%), followed by Youth Electronics (+12%), Vehicles (+2%), Games/Puzzles (+1%) and Explorative & Other Toys (+1%). Dolls (-19%), Infant/Toddler/Preschool Toys (-11%) and Outdoor & Sports Toys (-14%) were the 3 largest decliners. For the YTD August, toys was down -2% (Globally Toys market was down -1%)



August % Change YOY

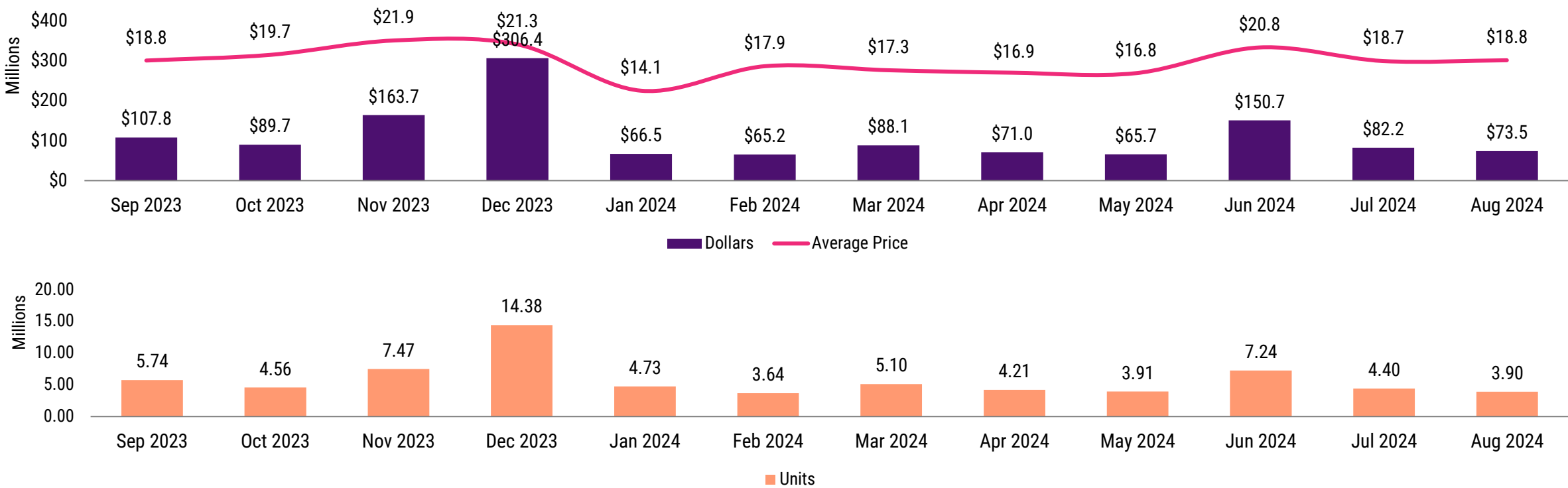


YTD % Change YOY

Monthly Trend

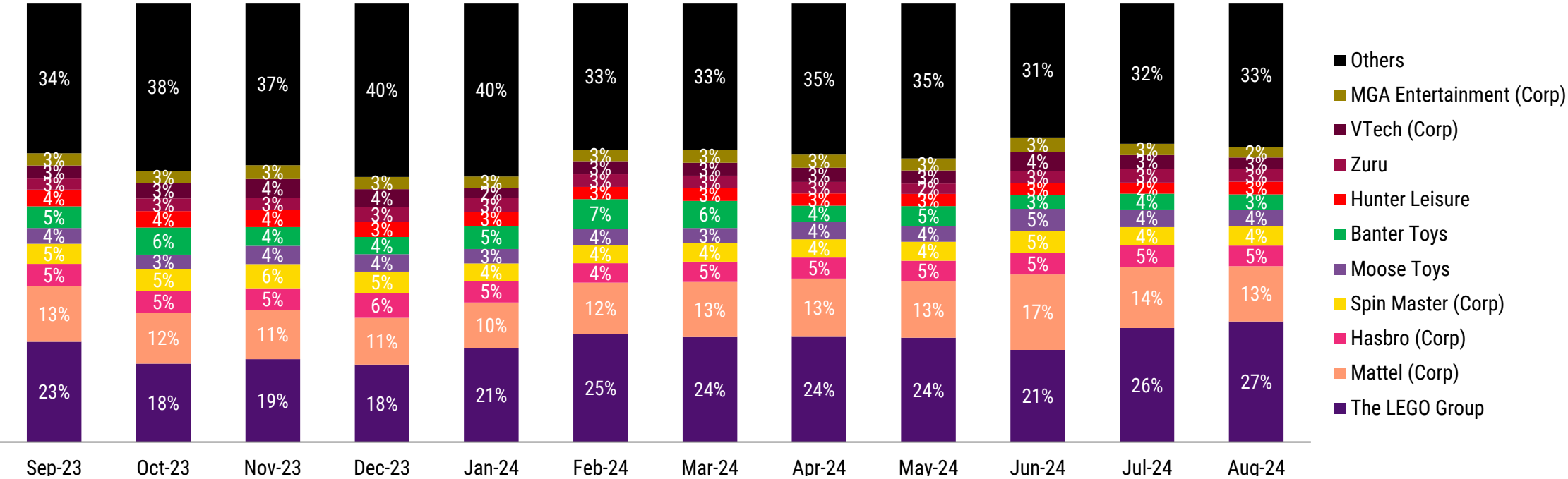
For August 2024, Building Sets (+22%) remained as the largest dollar category followed by Infant/Toddler/Preschool Toys (-11%), Dolls (-19%), Games/Puzzles (+1%), Vehicles (+2%) and Outdoor & Sports Toys (-14%). Average price was \$19.14 in August 2023 and dropped -2% to \$18.82 driven from licensed toys.

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



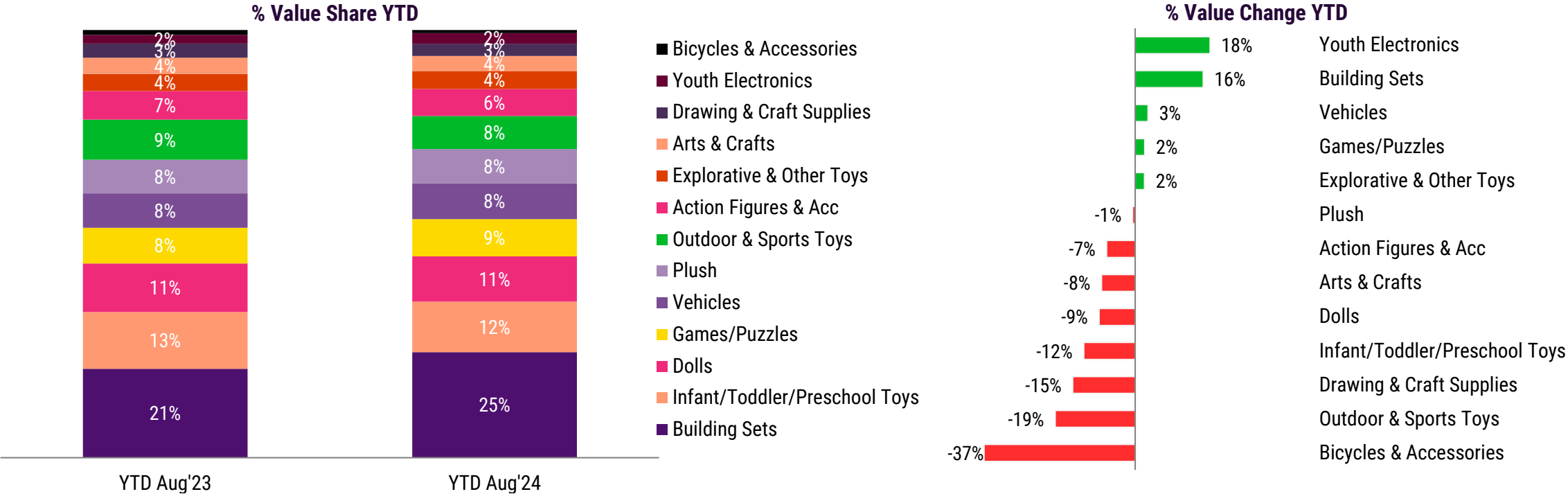
Corporate Manufacturers Trends

In August 2024, LEGO was the largest dollar manufacturer and gained 5 share points compared to August 2023. The top 3 dollar gaining manufacturers for this month are LEGO, Zuru and Jazwares. The top 3 leading dollar properties in August 2024 are Star Wars, LEGO Technic and Hot Wheels. For YTD August 2024, the top 3 dollar gaining properties are LEGO Icons, LEGO Technic and LEGO Disney Classic while Despicable me is the 5th dollar gaining property. The top 3 dollar gaining manufacturers for YTD August are LEGO, Mattel and Zuru. Outside of the top 10 ranked by dollar for YTD August 2024, Bandai grew in dollars and moved up in rankings to #21.



Category Trends

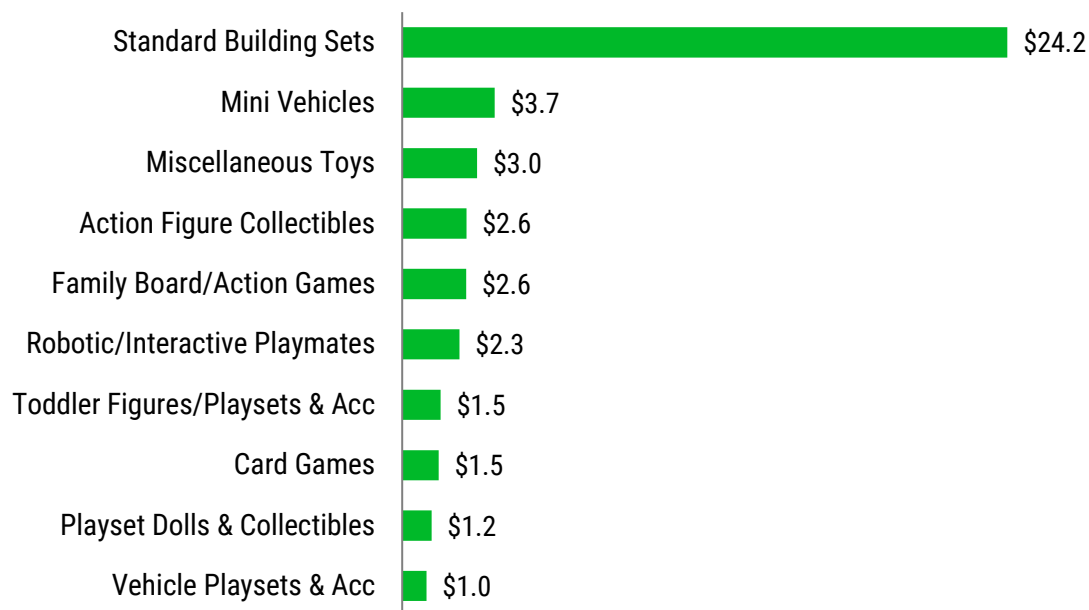
For YTD August 2024, 5 categories grew, these same categories also grew for the month of August 2024 vs. LY, Building Sets (+22%) driven by LEGO Icons, LEGO Technic and LEGO Star Wars, Youth Electronics (+12%) driven by Little Live, LeapPad Tablet and Robo Alive, Vehicles (+2%) driven by Hot Wheels, Monster Jam and Cars The Movies, Games/Puzzles (+1%) driven by UNO, Bluey and Monopoly and Explorative & Other Toys (+1%) driven by Disney All Other, Bluey and Little Tikes, meanwhile Dolls experienced a decline -19% for the month.



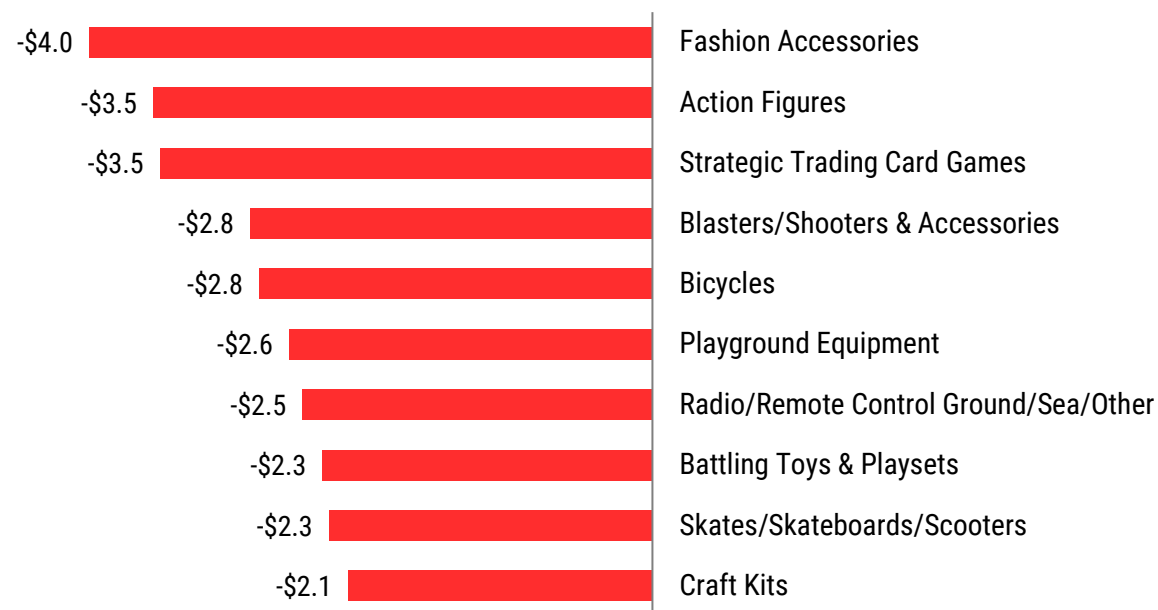
Subclass Trends

The top 3 subclass gainers for this month were Standard Building Sets (+24%) driven by LEGO Icons, LEGO Technic and LEGO Star Wars, Action Figure Collectibles (+47%) driven by Smashers and Rainbow Friends and Family Board/Action Games (+44%) driven by Monopoly, Harry Potter and Exploding Kittens. Meanwhile Fashion Accessories declined (-51%) and was the most declined subclass.

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



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



Property Trends

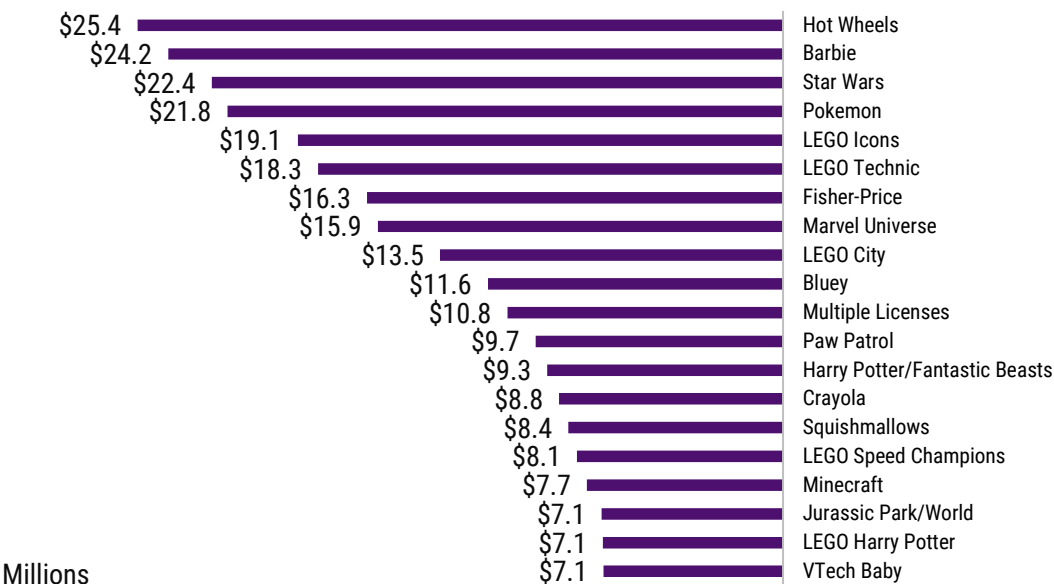
Top 5 Dollar Properties August '24

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

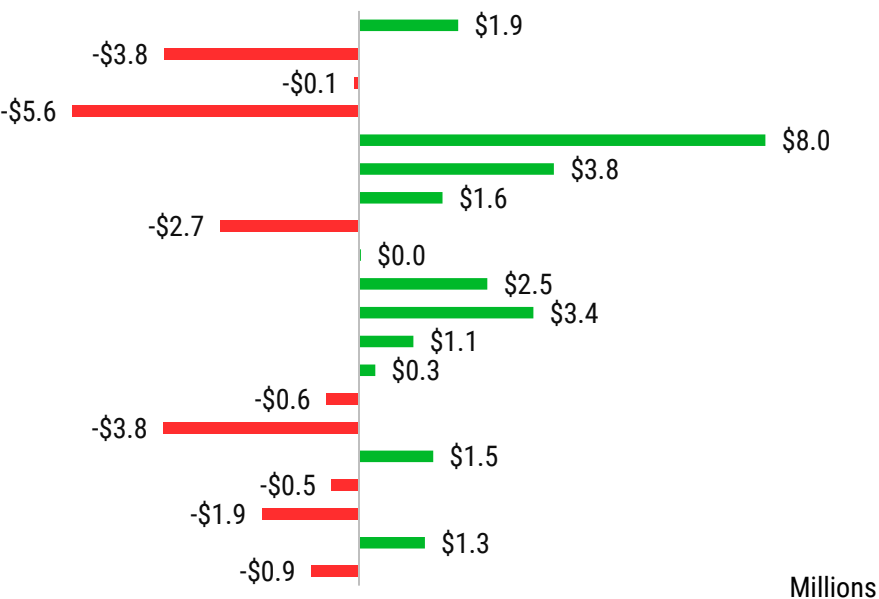
Top 5 Dollar Gaining Properties August '24 vs. August '23

- #1 – LEGO Icons
- #2 – LEGO Technic
- #3 – Mercedes-Benz
- #4 – LEGO Star Wars
- #5 – LEGO Disney Classic

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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