

ATA Report

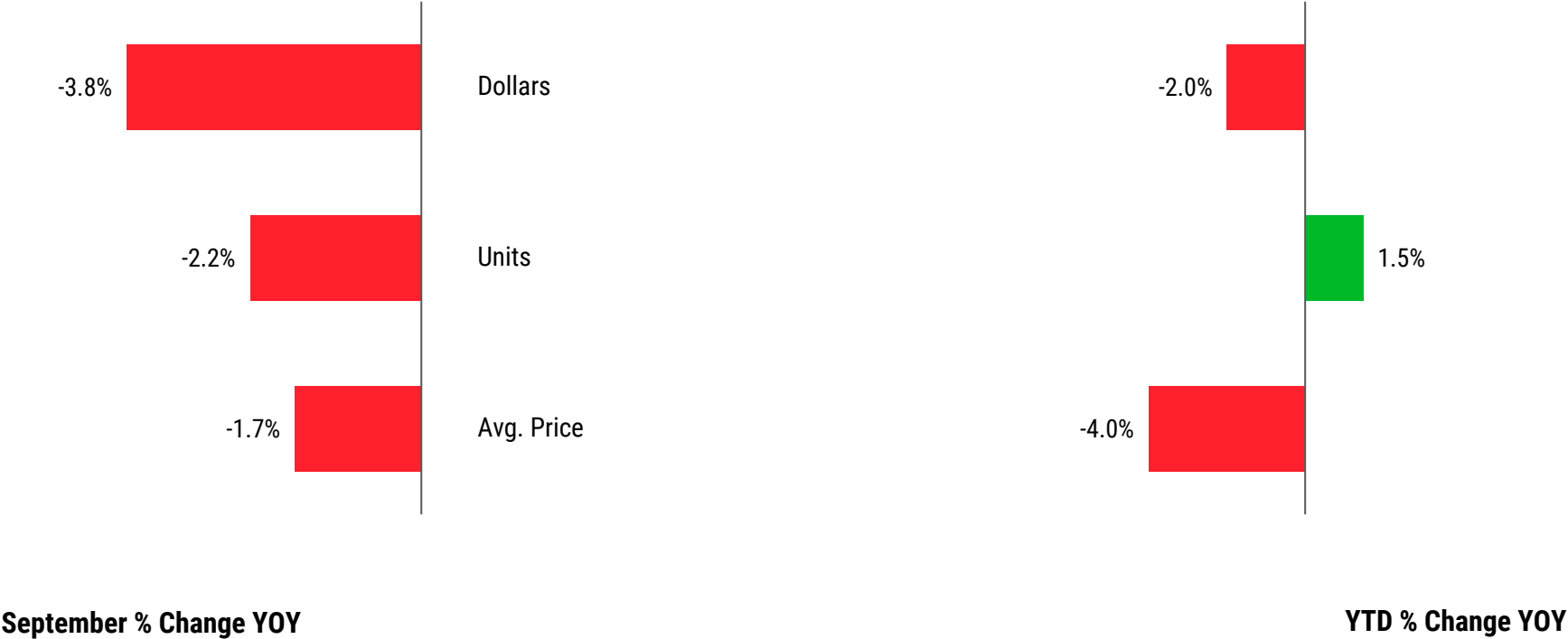
Sep 2024

Australia Toy Association



Industry Trends

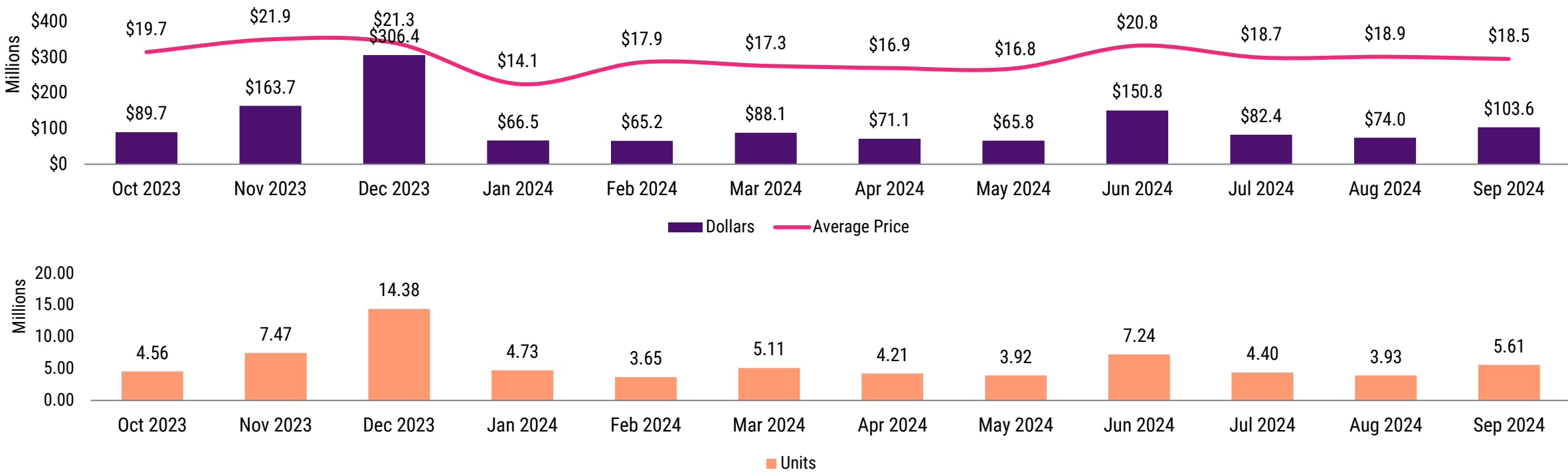
September 2024 experienced a -4% decline in dollars, -2% in units and -2% in average price. 3 categories grew, Games/Puzzles had taken over Building Sets this month as the largest gainer (+13%), followed by Building Sets (+4%) and Vehicles (+3%). Outdoor & Sports Toys (-23%), Dolls (-11%) and Infant/Toddler/Preschool Toys (-5%) were the 3 largest decliners. For YTD September, toys was down -2%, in comparison overall global toys market was -1% down.



Monthly Trend

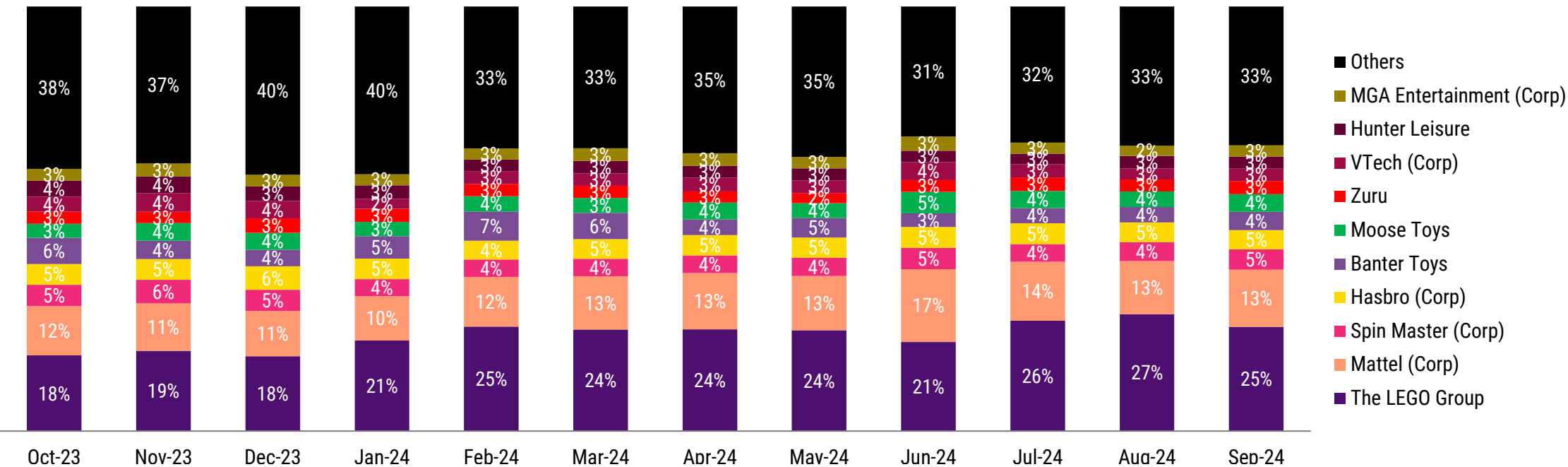
For September 2024, Building Sets (+4%) remained as the largest dollar category followed by Infant/Toddler/Preschool Toys (-5%), Dolls (-11%), Games/Puzzles (+13%), Outdoor & Sports Toys (-23%) and Vehicles (+3%). Average Price was \$18.78 in September 2023 and dropped -2% to \$18.47 driven from both licensed and unlicensed toys.

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



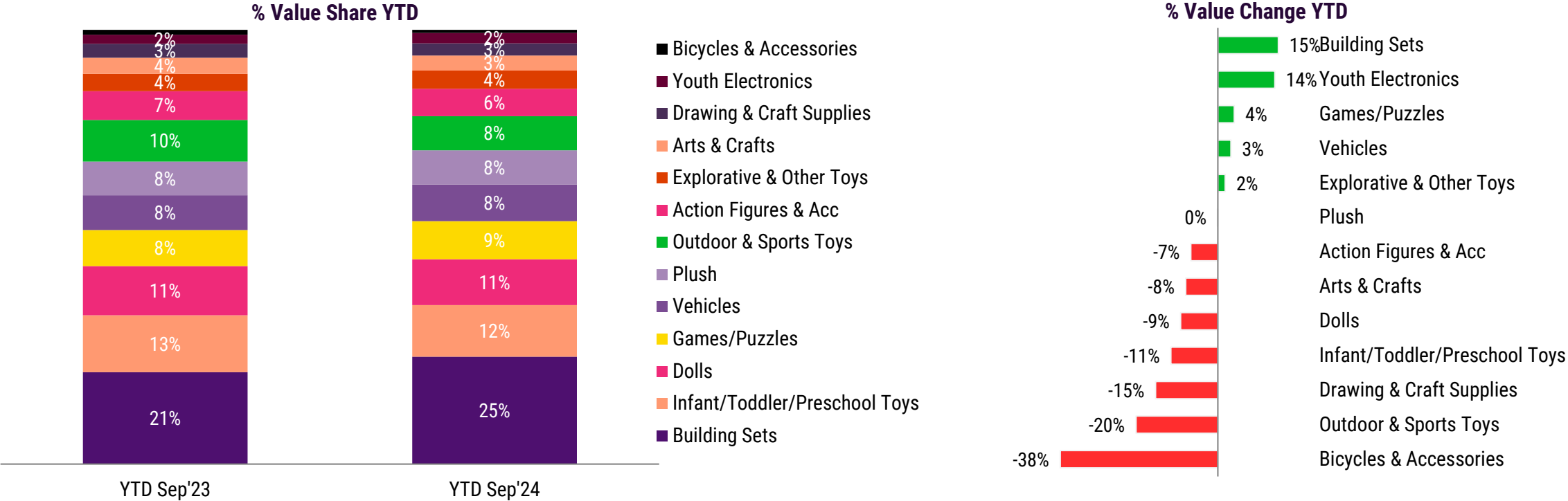
Corporate Manufacturers Trends

In September 2024, LEGO was the largest dollar manufacturer and gained 2 share points compared to September 2023. The top 3 dollar gaining manufacturers for this month are Jazwares, LEGO and Bandai. The top 3 leading dollar properties in September 2024 are Hot Wheels, Barbie and Pokémon. For YTD September 2024, the top dollar gaining properties are LEGO Icons, LEGO Technic, Mercedes-Benz and Despicable Me/Minions. The top 3 dollar gaining manufacturers for YTD September continues to be LEGO, Mattel and Zuru. Outside of the top 10 ranked by dollar for YTD September 2024, Bandai grew in dollars and joined into the top 20.



Category Trends

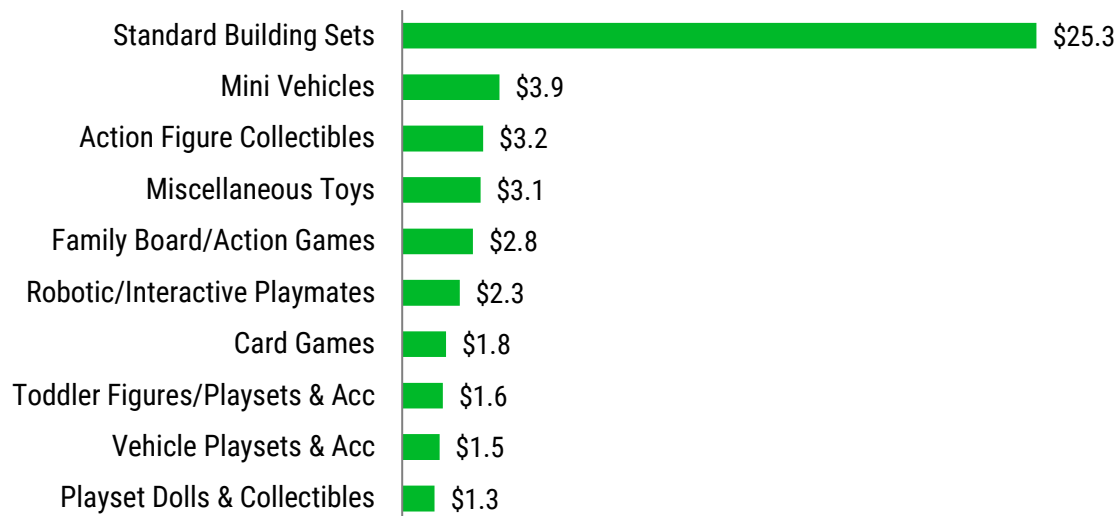
For YTD September 2024, 5 categories grew, however only 3 categories grew for the month of September 2024 vs. LY, Games/Puzzles (+13%) driven by One Piece, UNO and Pokémon, Building Sets (+4%) driven by LEGO Icons, Mercedes-Benz and LEGO Technic, Vehicles (+3%) driven by Hot Wheels, Monster Jam and Cars The Movie. Outdoor and Sports Toys experienced a -23% decline for the month.



Subclass Trends

The top 3 subclass gainers for this month were Standard Building Sets (+4%) driven by LEGO icons, Mercedes-Benz and LEGO Technic, Action Figure Collectibles (+53%) driven by Smashers, Heroes of Goo Jit Zu and Funko Pop! and Strategic Trading Card Games (+22%) driven by One Piece, Pokémon and Lorcana.

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



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



Property Trends

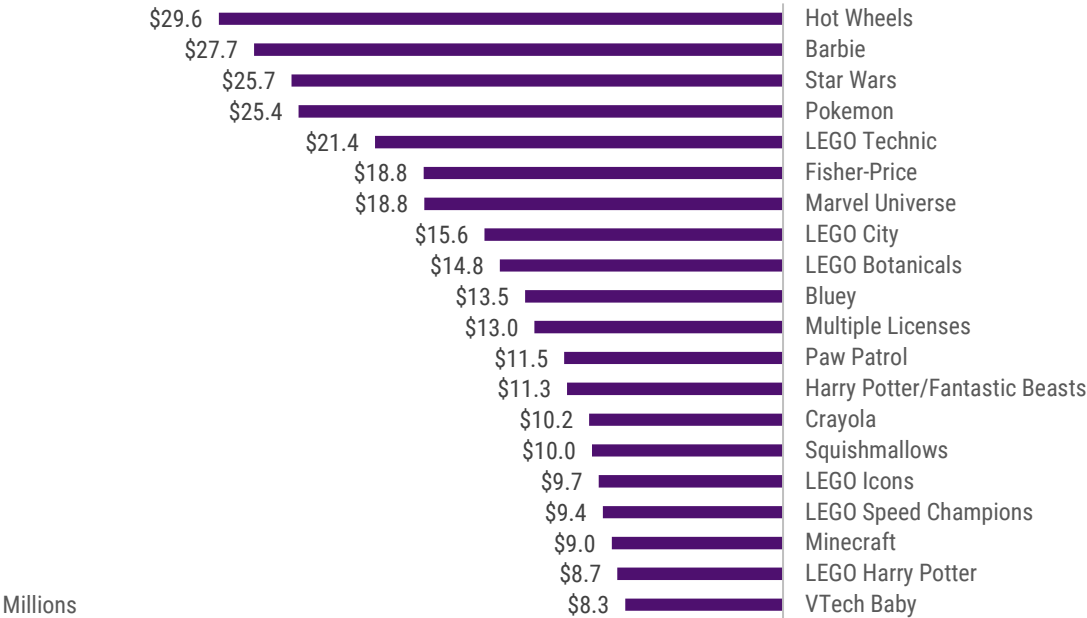
Top 5 Dollar Properties September '24

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

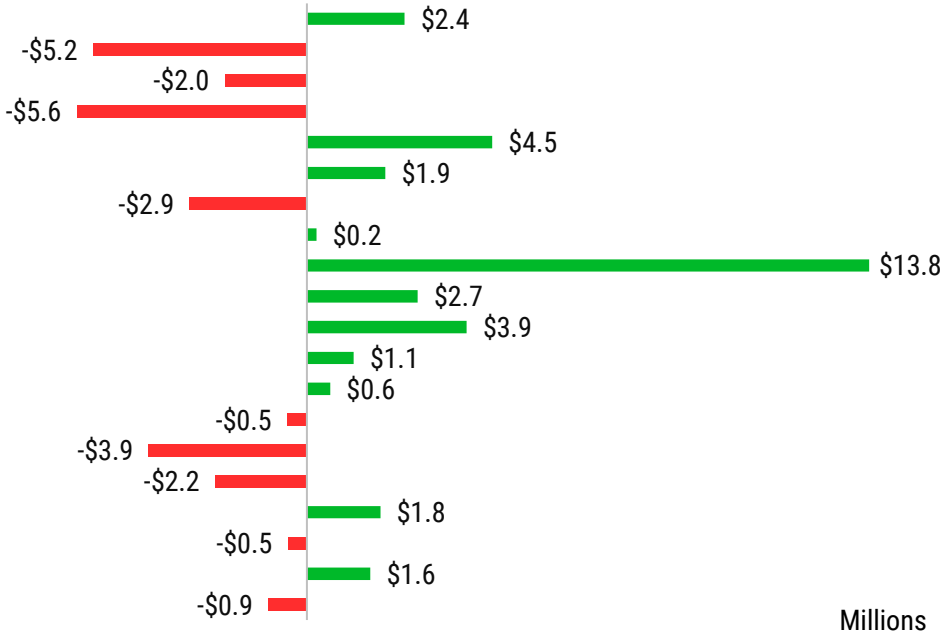
Top 5 Dollar Gaining Properties September '24 vs. September '23

- #1 – LEGO Icons
- #2 – Mercedes-Benz
- #3 – Monster High
- #4 – LEGO Technic
- #5 – One Piece

Top 20 Properties YTD



\$ Value Change vs YAG



For more information

Contact Circana, Inc. and Circana Group, L.P. at 866-444-1411 or email HelpDesk@circana.com, or your account representative below.

Amelia Eng

Senior Account Manager

Amelia.Eng@circana.com

+61 418 500 547

Jim Thach

Account Manager

Jim.Thach@circana.com

+61 428 001 154

About Contact Circana, Inc. and Circana Group, L.P.

The **Circana, Inc.** provides market information and business solutions that drive better decision-making and better results. The world's leading brands rely on us to help them get the right products in the right places for the right people. Practice areas include apparel, appliances, automotive, beauty, consumer electronics, diamonds, e-commerce, entertainment, fashion accessories, food consumption, foodservice, footwear, home, mobile, office supplies, retail, sports, technology, toys, video games, and watches / jewelry.

For more information visit us at circana.com

Follow us on Twitter: [@Circana](https://twitter.com/Circana)

