

ATA Report

Oct 2024

Australia Toy Association



Industry Trends

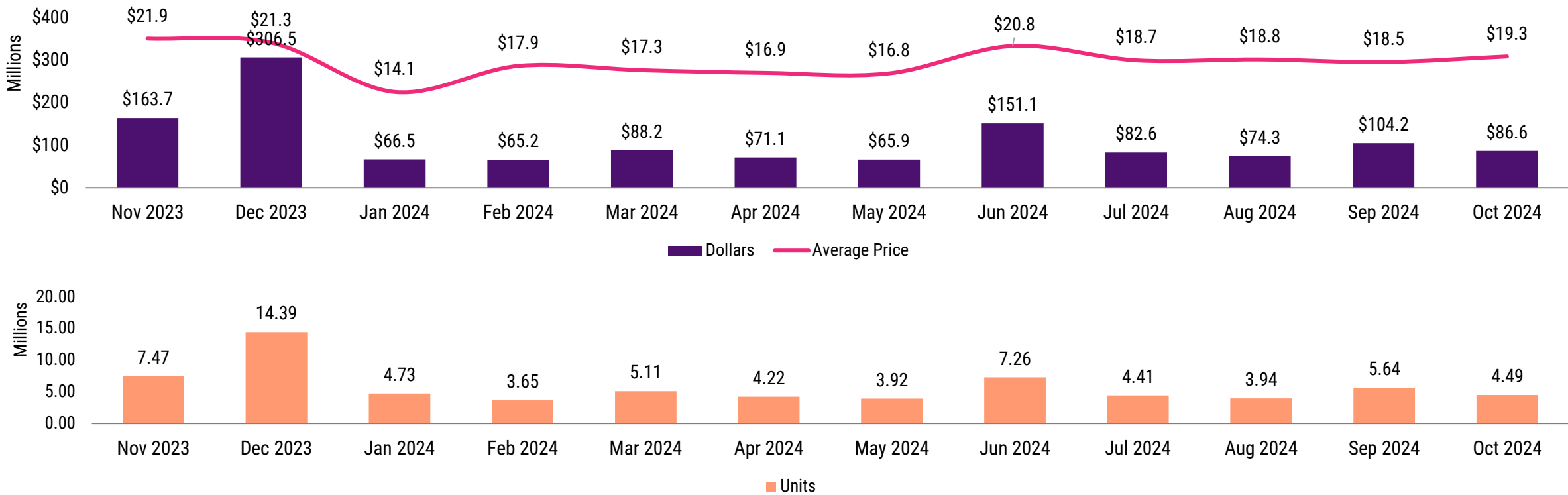
October 2024 experienced a -3% decline in dollars, -2% in units and -2% in average price. 2 categories grew this month, Building Sets (+15%) was the largest gainer this month, followed by Arts & Crafts (+8%). Outdoor & Sports Toys (-17%), Dolls (-11%) and Plush (-9%) were the 3 largest decliners. For YTD October 2024, toys was down -3%, in comparison global toys market was -1%.



Monthly Trend

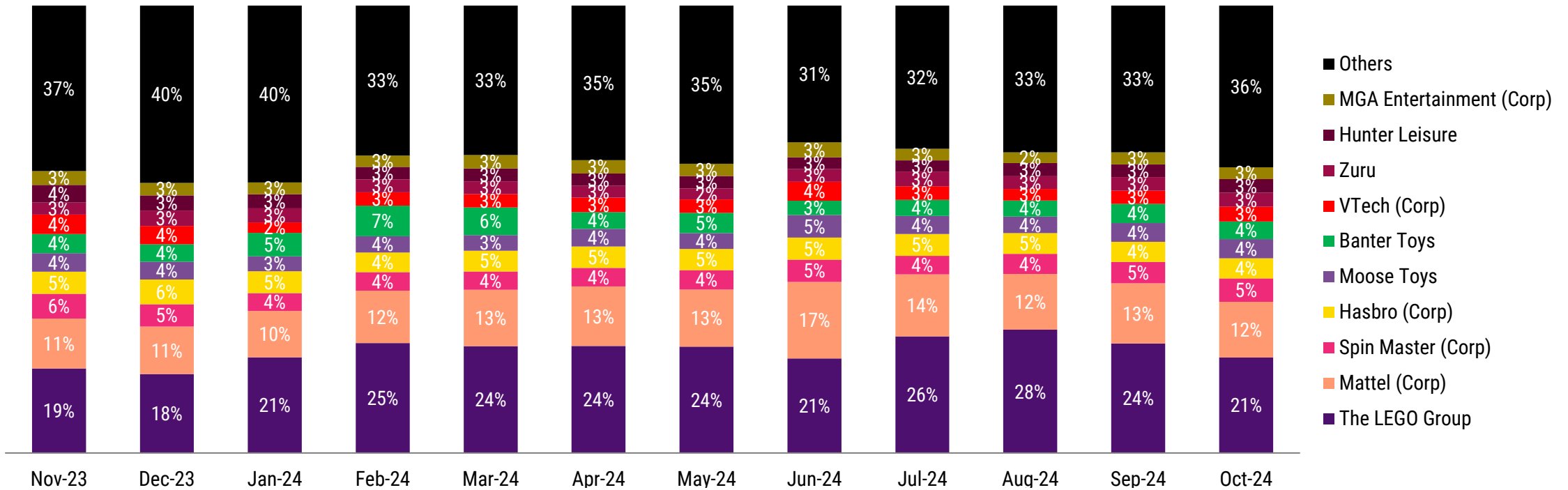
For October 2024, Building Sets (+15%) remained as the largest dollar category followed by Infant/Toddler/Preschool Toys (-4%), Outdoor & Sports Toys (-17%), Dolls (-11%), Games/Puzzles (-3%) and Vehicles (flat). Average price was \$19.66 in October 2023 and dropped -2% to \$19.28 driven from both licensed and unlicensed toys.

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



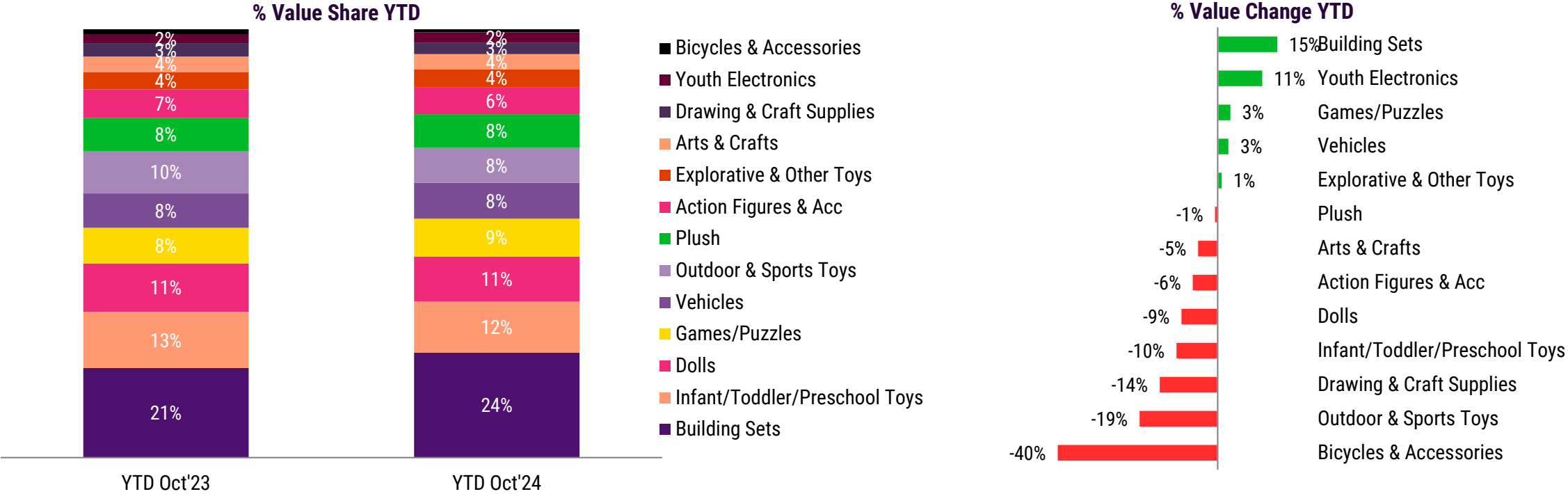
Corporate Manufacturers Trends

Hot Wheels, Barbie and Pokémon were the dollar leading properties for the month but the top 3 dollar gaining manufacturers for this month were LEGO, Tonies and Moose Toys. LEGO was the largest dollar gaining manufacturer and gained 3 share points compared to October 2023. For YTD October 2024, the top 3 dollar gaining properties were LEGO Icons, LEGO Technic and Mercedes-Benz, while the top 3 dollar gaining manufacturers continue to be LEGO, Mattel and Zuru. Outside of the top 10 dollar ranked for YTD October 2024, Jazwares and Bandai were the next 2 manufacturers which grew in dollars vs. LY.



Category Trends

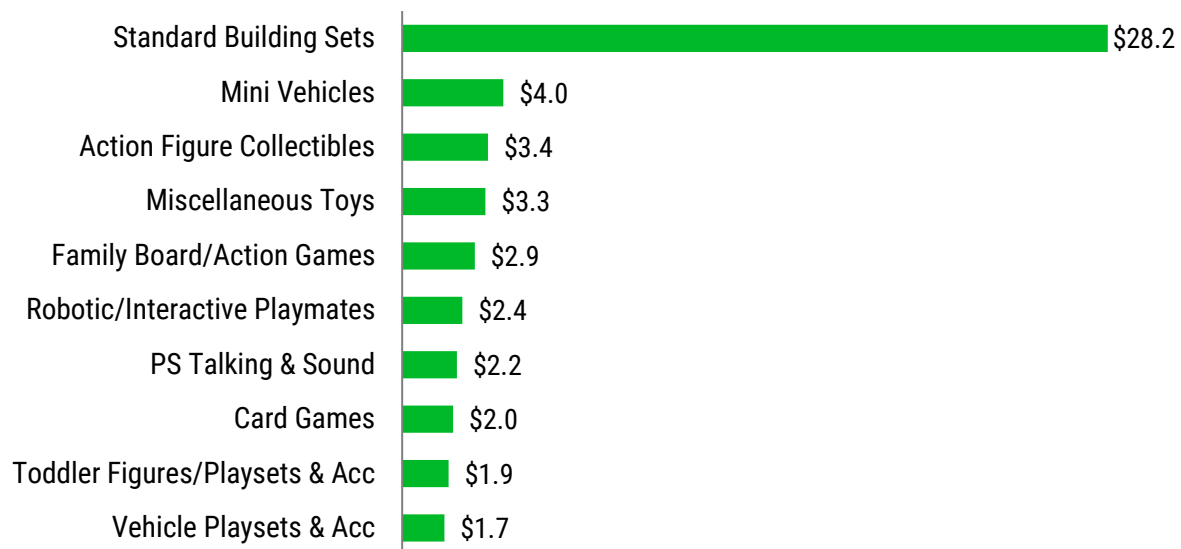
For YTD October 2024, 5 categories grew, however only 2 categories grew for this month vs. LY, Building Sets (+15%) driven by LEGO Icons, LEGO Technic, Mercedes-Benz and Dungeons & Dragons and Arts & Crafts (+8%) driven by Cra-Z-Art. LEGO Art and Crayola. Vehicles was flat, however Hot Wheels was the top growing property under this category. Outdoor and Sports toys continue to be the largest decliner and experienced a -17% decline for the month.



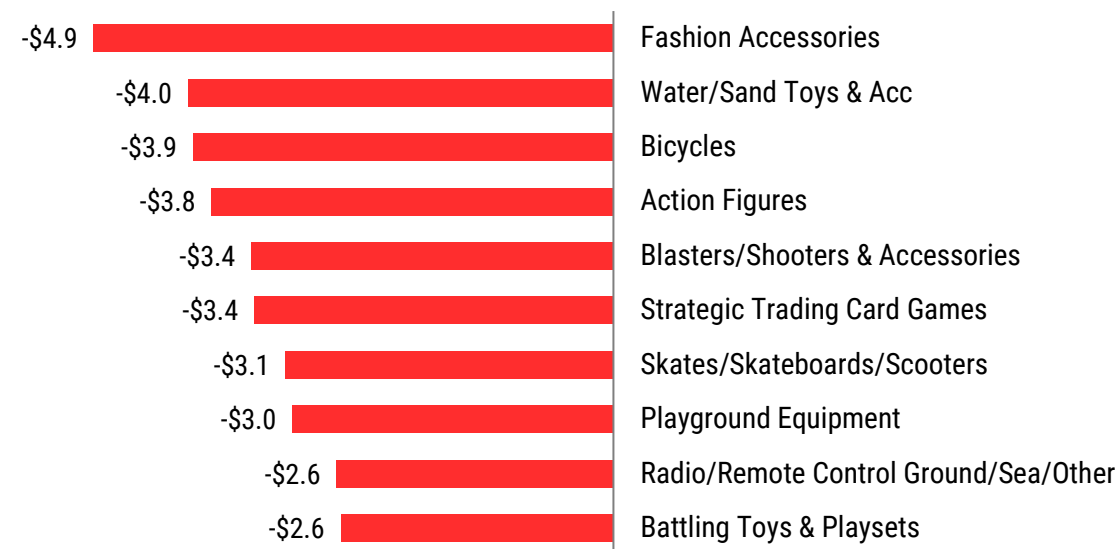
Subclass Trends

The top 3 subclass gainers for this month were Standard Building Sets (+16%) driven by LEGO Icons, LEGO Technic, Mercedes-Benz and Dungeons & Dragons, PS Talking & Sound (>100%) driven by predominately Toniebox and Other Non-Pedal Ride-Ons driven by predominately Little Tikes.

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



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



Property Trends

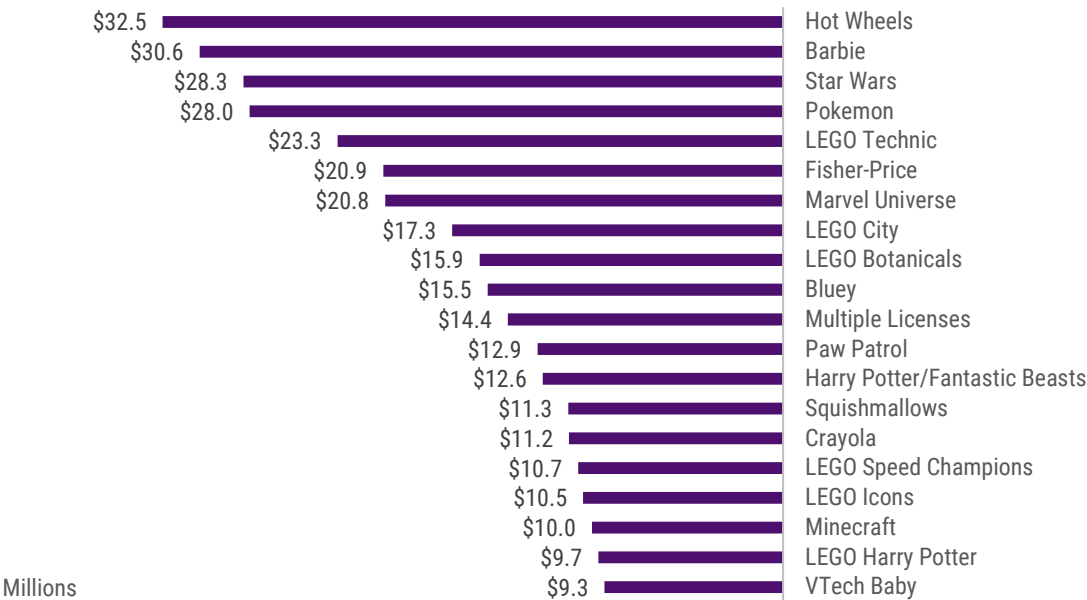
Top 5 Dollar Properties October '24

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

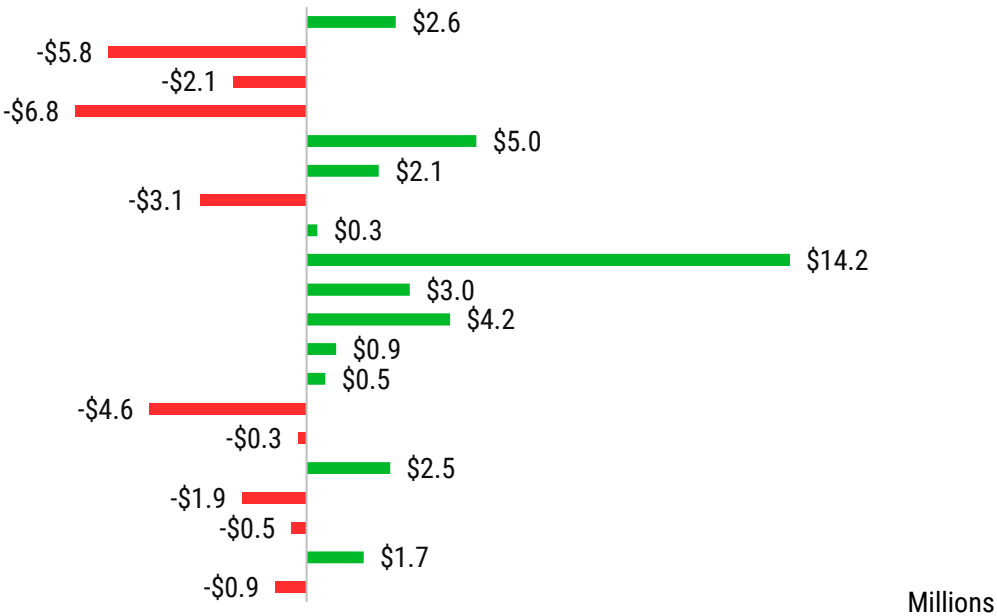
Top 5 Dollar Gaining Properties October '24 vs. October '23

- #1 – LEGO Icons
- #2 – Toniebox
- #3 – MrBeast
- #4 – Lilo And Stitch
- #5 – LEGO Technic

Top 20 Properties YTD



\$ Value Change vs YAG



Millions

Millions



Toys Australia YTD Oct 2024

For more information

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