

ATA Report

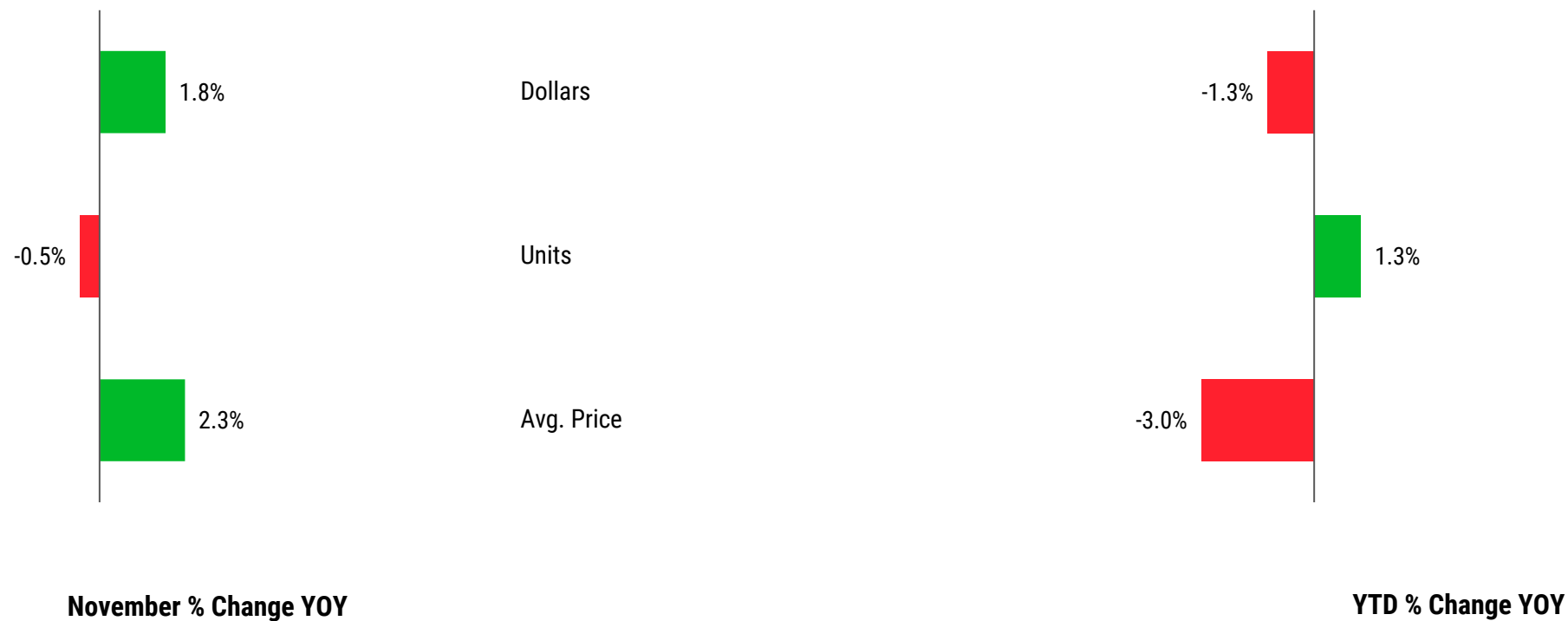
Nov 2024

Australia Toy Association



Industry Trends

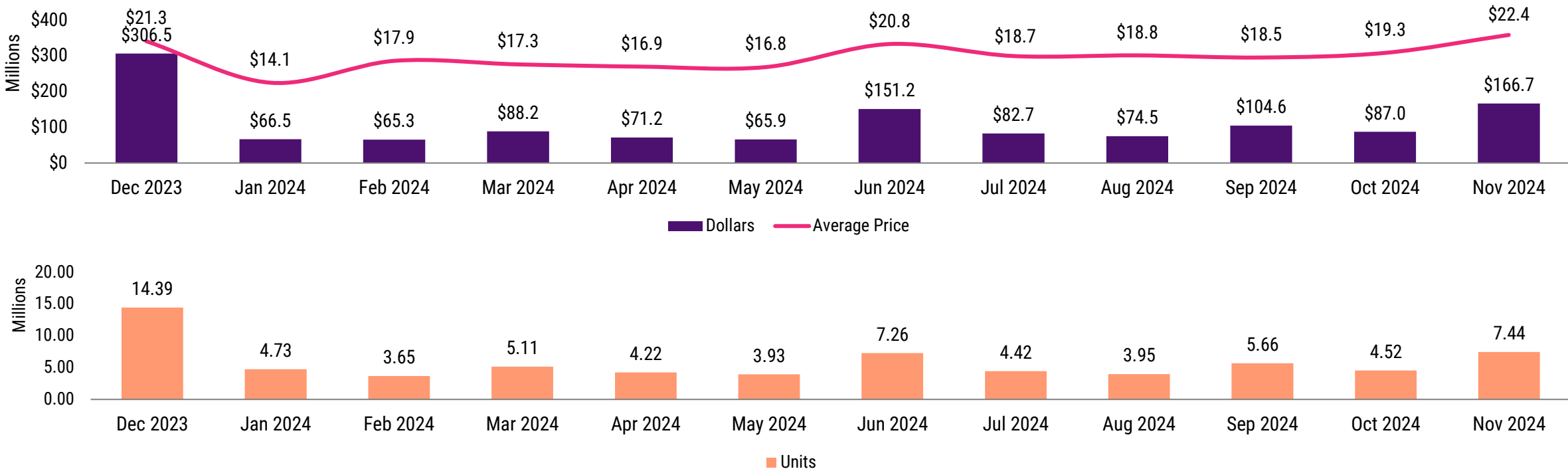
November 2024 experienced a +2% growth in dollars, -1% in units and +2% growth in average price. Building Sets (+22%) was the largest gainer this month, followed by Games/Puzzles (+17%), Vehicles (+9%) and Youth Electronics (+11%). Outdoor & Sports toys (-13%), Bicycles (-51%) and Drawing & Craft Supplies (-23%) were the largest 3 decliners. For YTD November 2024, toys was down -1% in dollars, in comparison global toys was at a flat.



Monthly Trend

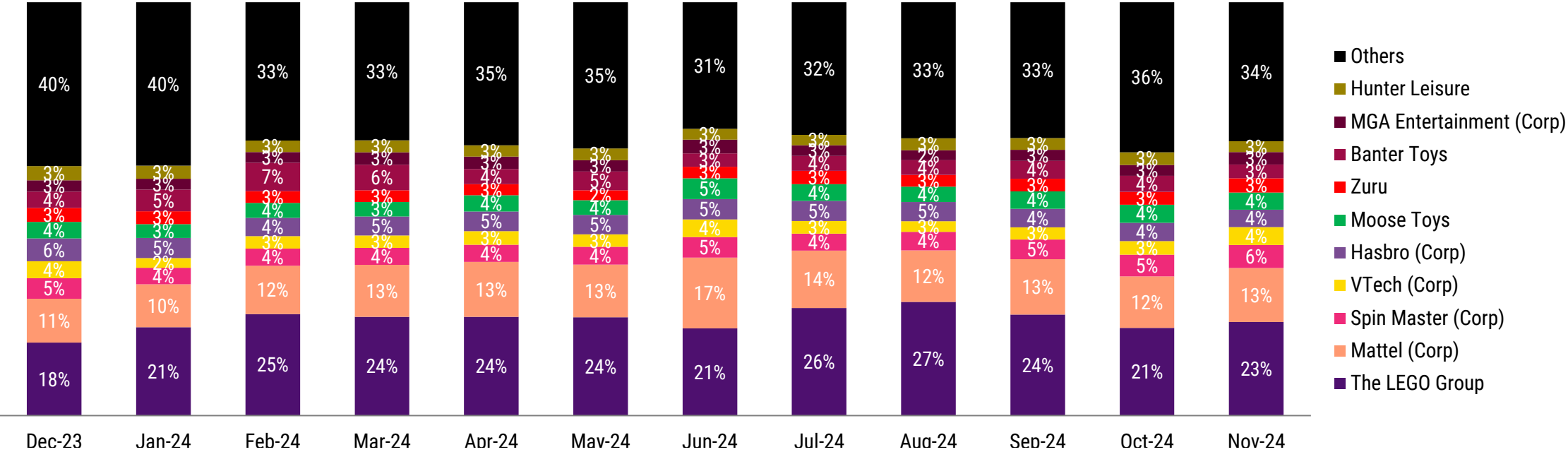
For November 2024, Building Sets (+22%) remained as the largest dollar category followed by Infant/Toddler/Preschool Toys (-3%), Outdoor & Sports Toys (-13%), Dolls (-3%), Games/Puzzles (+17%) and Vehicles (+9%). Average Price was \$21.90 and grew +2% to \$22.41 driven from both licensed and unlicensed toys.

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



Corporate Manufacturers Trends

Barbie, Hot Wheels and Star Wars were the top 3 dollar leading properties for the month. LEGO remain the top dollar gaining manufacturer for this month and gained 4 share points compared to November 2023, followed by Mattel gained 2 share points and Tonies in the top 3. For YTD November 2024, the top 3 dollar gaining properties continue to be 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 November 2024, Jazwares and Bandai were the next 2 manufacturers which grew in dollars vs. LY, Bandai moved up 9 ranking spots.



Category Trends

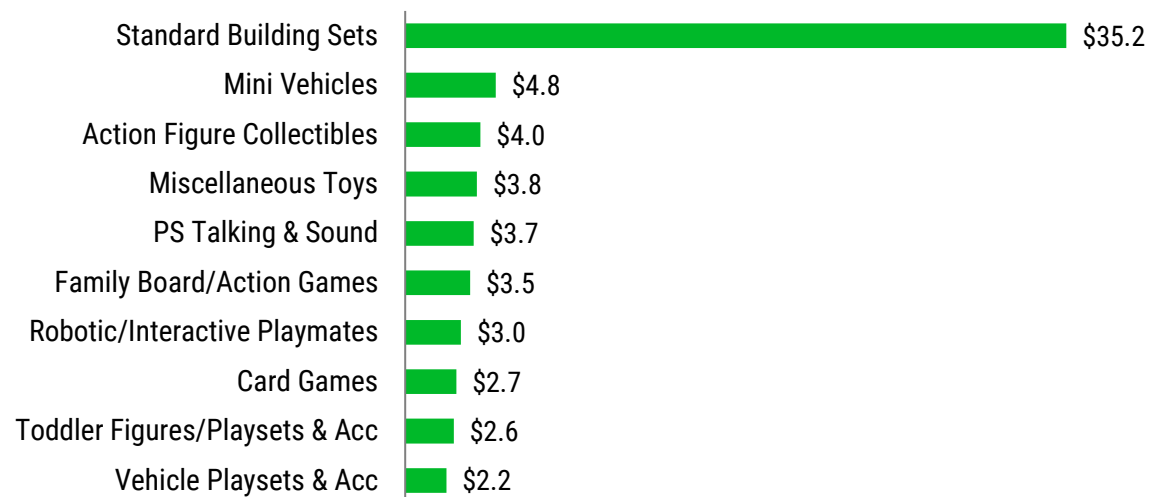
For YTD November 2024, 5 categories grew, however 4 categories grew for this month vs. LY, Building Sets (+22%) driven by LEGO Technic, LEGO Icons, Mercedes-Benz and Harry Potter, Games/Puzzles (+17%) driven by Pokémon, UNO and Bluey, Vehicles (+9%) driven by Hot Wheels, Marvel Universe and Cars The Movie and Youth Electronics (+11%) driven by Little Live, Magic Adventures and Kidi... Outdoor & Sports Toys continue to be the largest decliner and experienced a -13% decline for the month.



Subclass Trends

The top 3 subclass gainers for this month were Standard Building Sets (+24%) driven by LEGO Technic, LEGO icons, Mercedes-Benz and Harry Potter, PS Talking & Sounds (>100%) driven by predominately Toniebox and Fashion Dolls (+18%) driven by Monster High, Wednesday and Barbie.

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



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



Property Trends

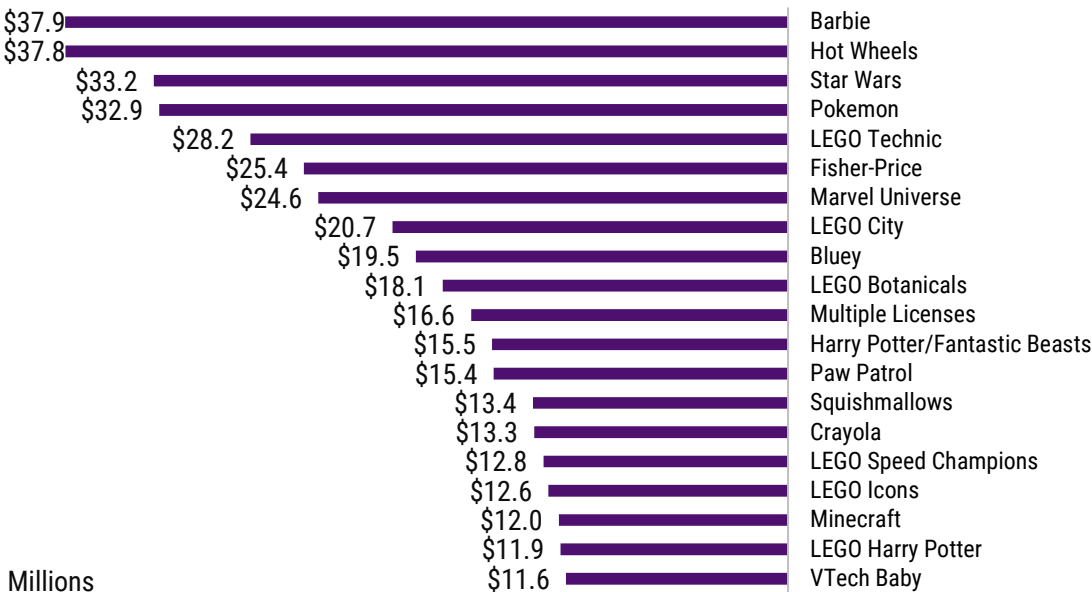
Top 5 Dollar Properties November '24

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

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

- #1 – LEGO Technic
- #2 – LEGO Icons
- #3 – Mercedes-Benz
- #4 – Toniebox
- #5 – Hot Wheels

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)

