

ATA Report

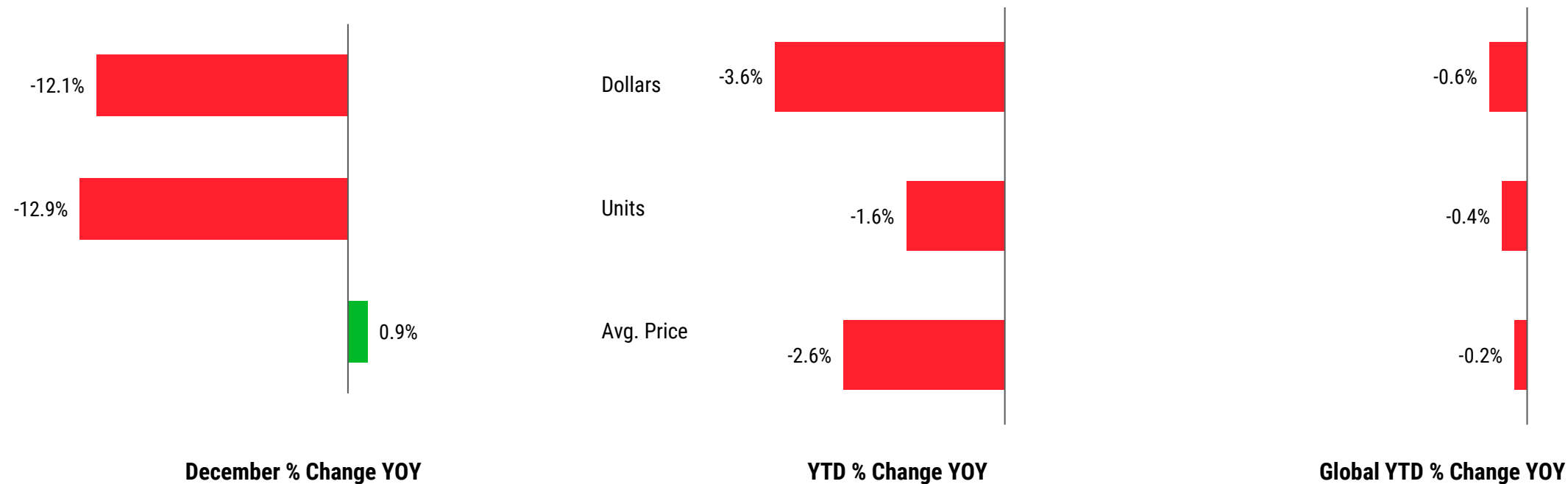
Dec 2024

Australia Toy Association



Industry Trends

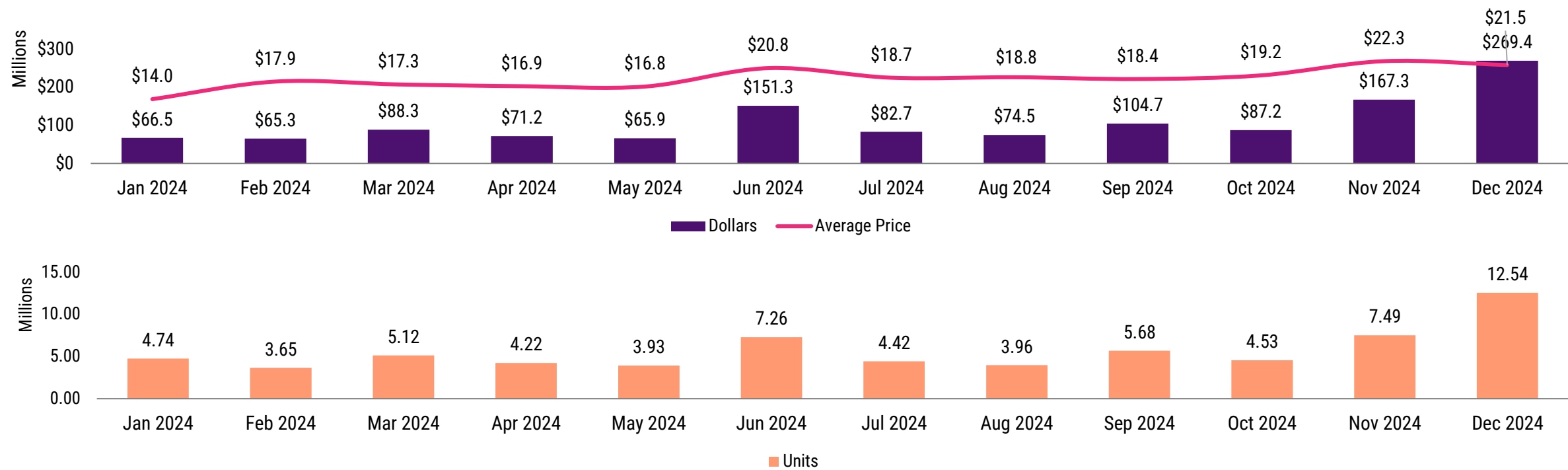
December 2024 experienced a -12% decline in dollars, -13% in units however a +1% growth in average price. Building Sets (+3%) was the only category gainer for this month. Outdoor & Sports Toys (-21%), Infant/Toddler/Preschool Toys (-15%) and Dolls (-16%) were the 3 largest category decliners. For YTD December 2024 vs. LY, toys was down -4% in dollars, in comparison global toys was slightly down by -1%.



Monthly Trend

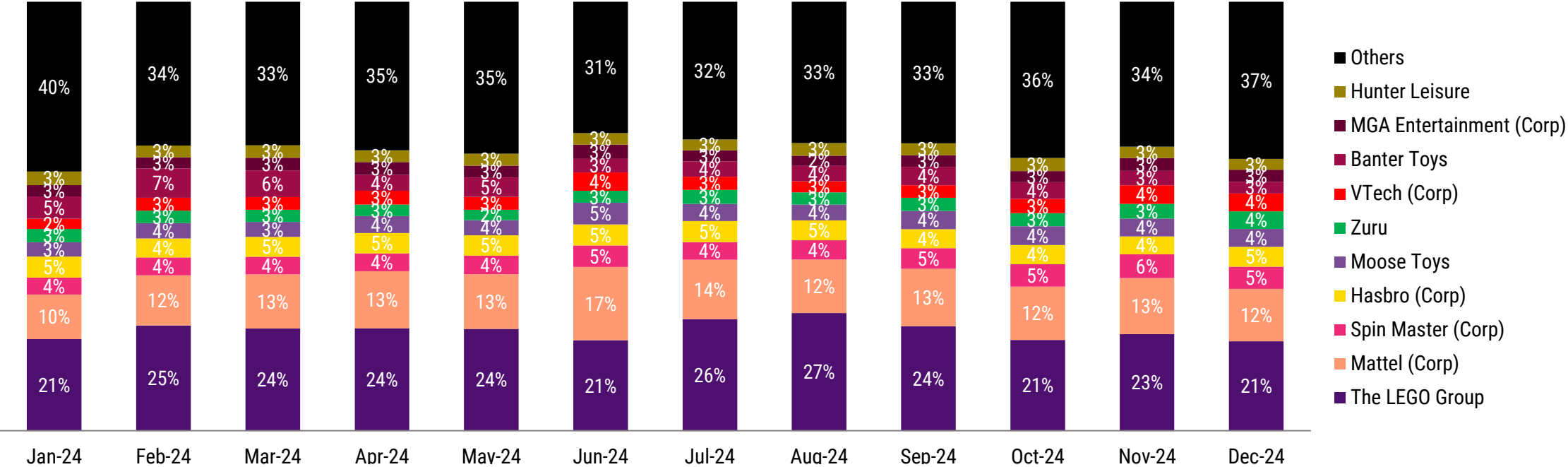
For December 2024, Building Sets (+3%) remained as the largest dollar category followed by Outdoor & Sports Toys (-21%), Infant/toddler/Preschool (-15%), Dolls (-16%), Games/Puzzles (-5%) and Vehicles (-9%). Average Price was \$21.29 and slightly grew +1% to \$21.49 driven from unlicensed toys.

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 December 2024. LEGO remained the top dollar gaining manufacturer for this month and gained 3 share points compared to December 2023, followed by Tonies and Jazwares. For YTD December 2024, the top dollar gaining properties were LEGO Botanicals, Mercedes-Benz, LEGO Technic and LEGO Icons, while the top 3 dollar gaining manufacturers were LEGO, Mattel and Zuru. Outside of the top 10 dollar ranked for YTD December, Jazwares, Bandai and VR Distribution were the next 3 corporate manufacturers that experienced dollars growth compared to 2023.



Category Trends

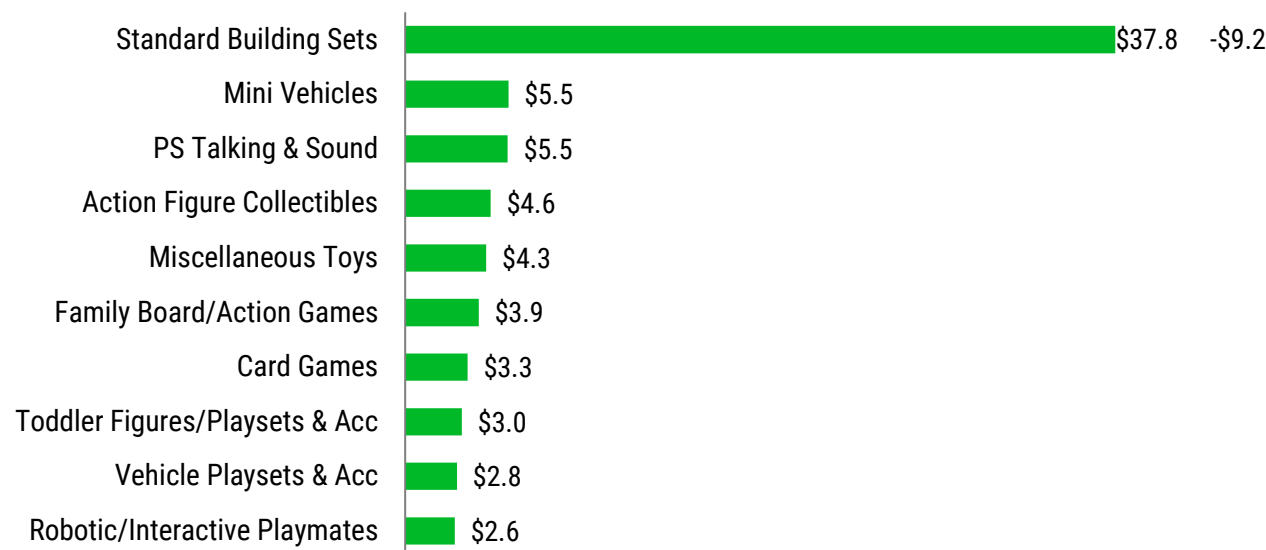
For December 2024 vs. LY, only Building sets category grew (+3%) driven by LEGO Botanicals, Mercedes-Benz, LEGO Icons and LEGO Harry Potter. However, for the YTD December 2024 vs. LY, 3 other categories grew alongside Building Sets (+13%), Games/Puzzles grew (+3%) driven by UNO, Bluey and One piece, Youth Electronics (+4%) driven by Bitzee, LeapPad Tablet and Robo Alive and Vehicles (+1%) driven by Hot Wheels, Cars The Movie and Monster Jam.



Subclass Trends

The top 3 subclass gainers for this month were Standard Building Sets (+5%) driven by LEGO Botanicals, Mercedes-Benz, LEGO Icons and LEGO Harry Potter, PS Talking & Sound (>100%) driven by predominately Toniebox and Mini Vehicles (+12%) driven by Hot Wheels, Formula 1, The Fast and The Furious.

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



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



Property Trends

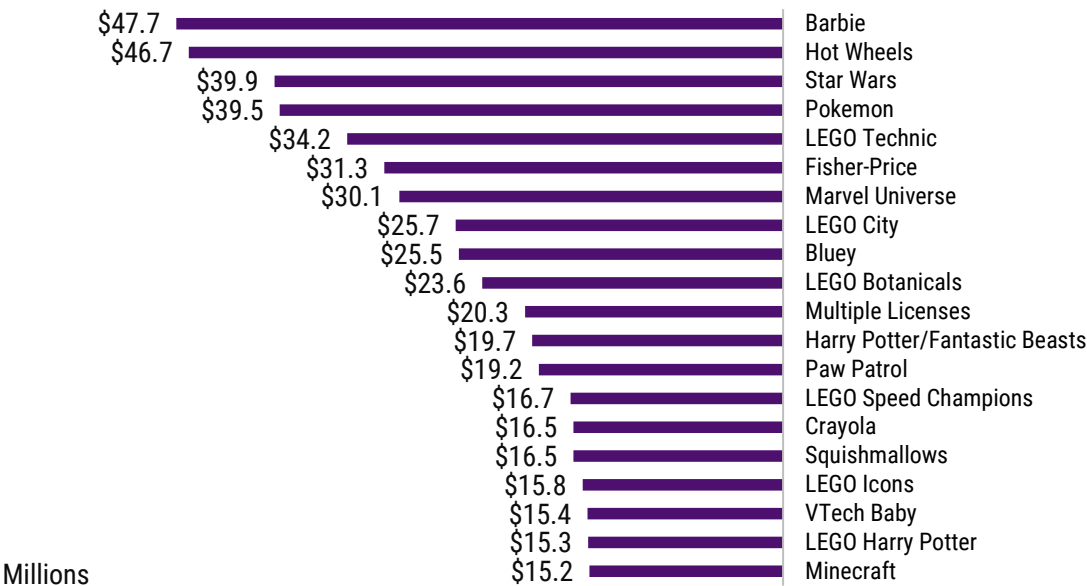
Top 5 Dollar Properties December '24

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

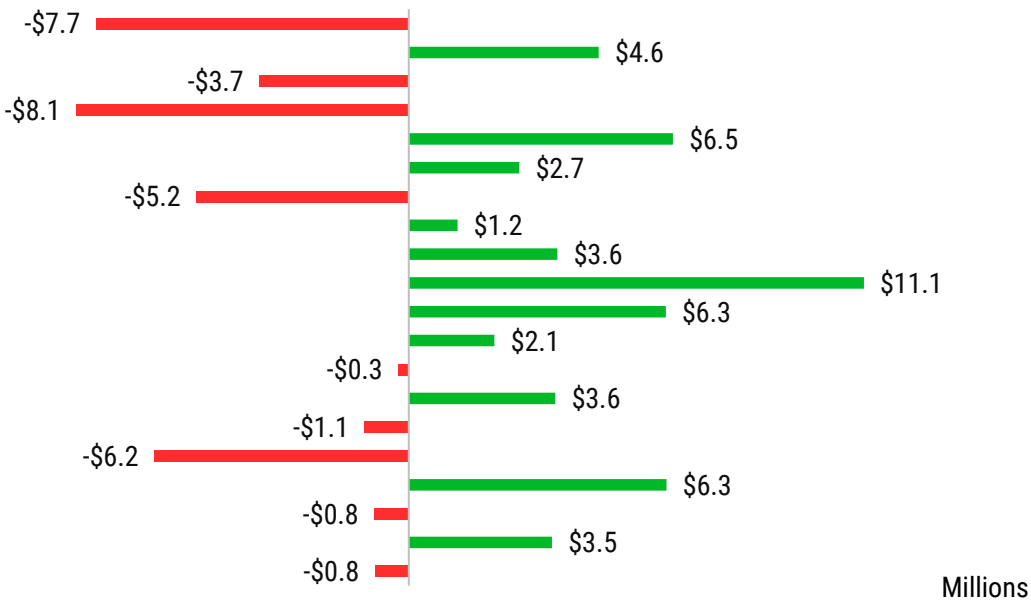
Top 5 Dollar Gaining Properties December '24 vs. December '23

- #1 – LEGO Botanicals
- #2 – Toniebox
- #3 – Wicked Movie
- #4 – MrBeast
- #5 – Mercedes-Benz

Top 20 Properties YTD



\$ Value Change vs YAG



Millions

Millions



Toys Australia YTD Dec 2024

For more information

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

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