

ATA Report

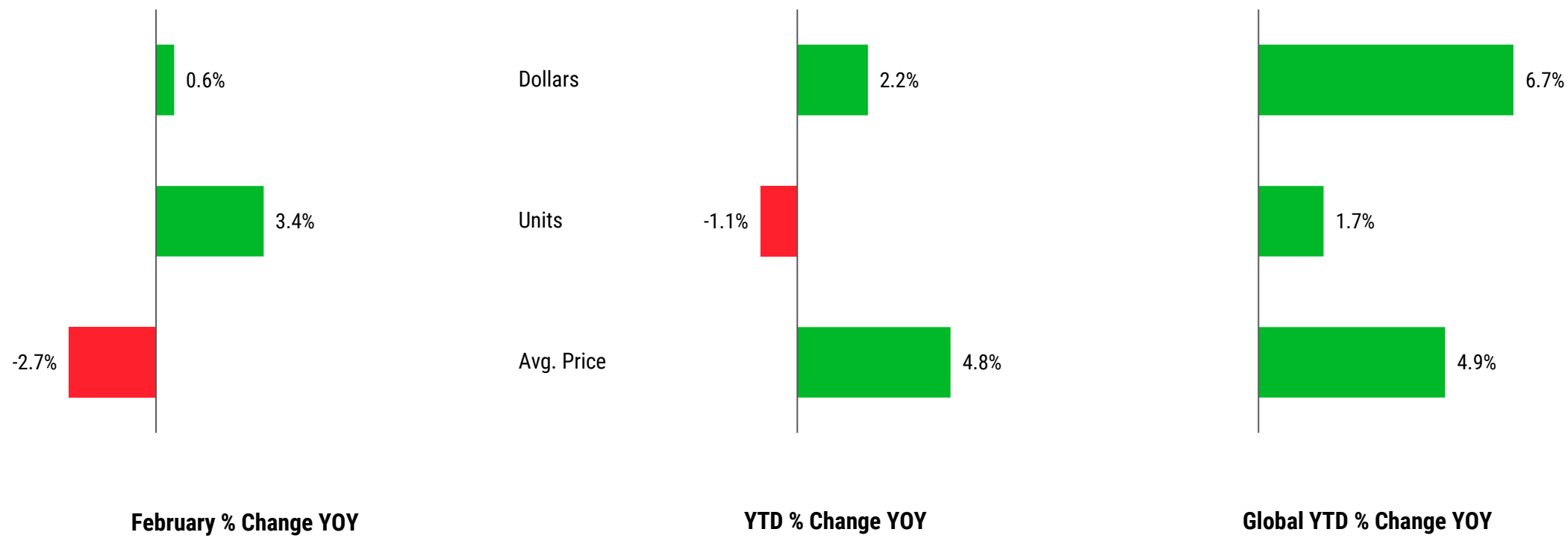
Feb 2025

Australia Toy Association



Industry Trends

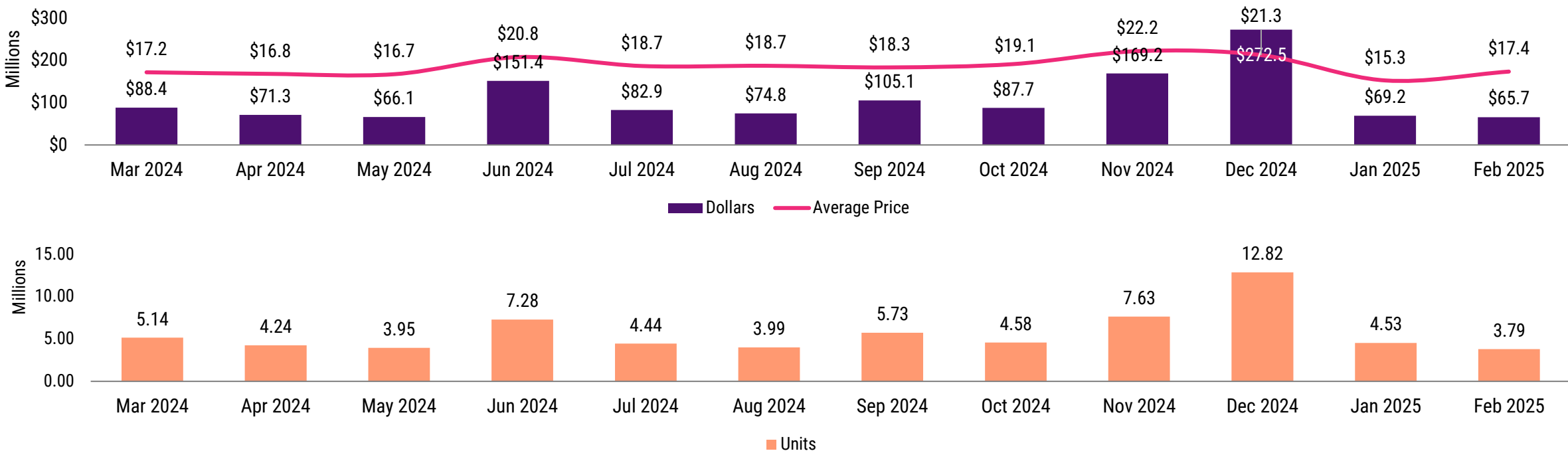
February 2025 experienced +1% growth in dollars, +3% in units and -3% decline in average price. Games/Puzzles (+29%) was the top category gainer for this month, followed by Building Sets (+1%), Action Figures (+2%), Bicycles (+16%), Explorative & Other Toys (+2%) and Vehicles (+1%). Plush (-11%), Outdoor & Sports (-10%) and Dolls (-7%) were the 3 largest category decliners. For YTD February 2025 vs. LY, toys was up +2% in dollars, in comparison global toys was up +7%.



Monthly Trend

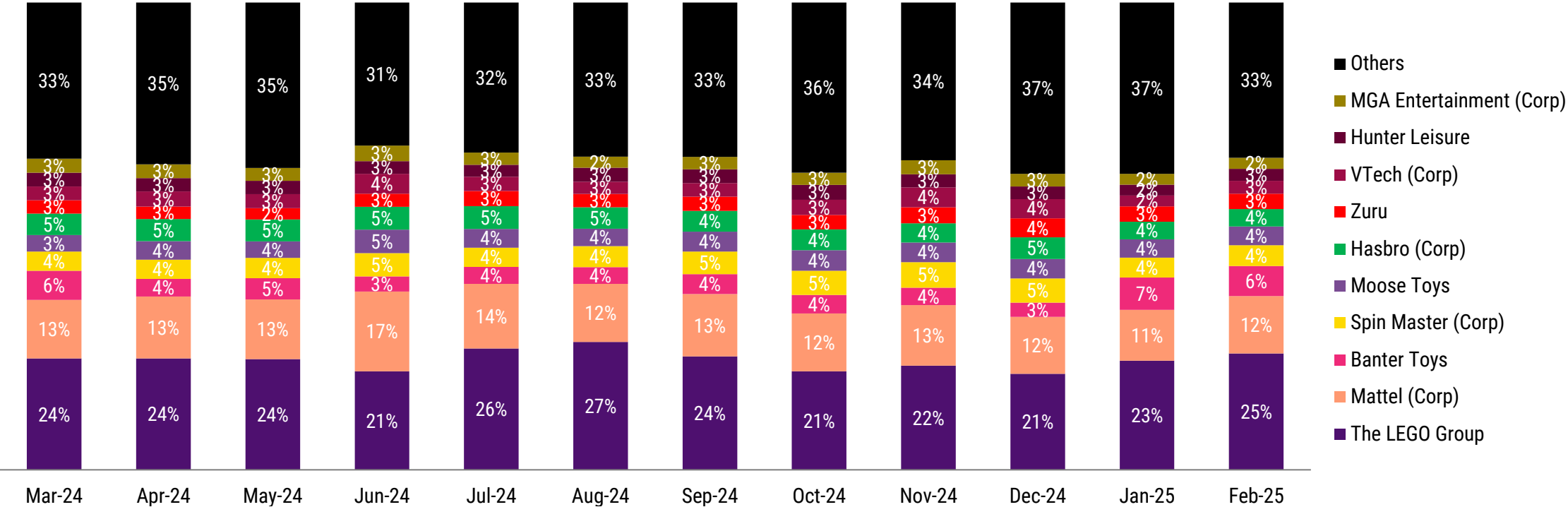
For February 2025, Building Sets (+1%) remained as the largest dollar category followed by Games/Puzzles (+29%), Infant/Toddler/Preschool (flat), dolls (-7%), vehicles (+1%) and Outdoor & Sports (-10%). Average Price was \$17.84 and declined -3% to \$17.35 driven from licensed and unlicensed toys.

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



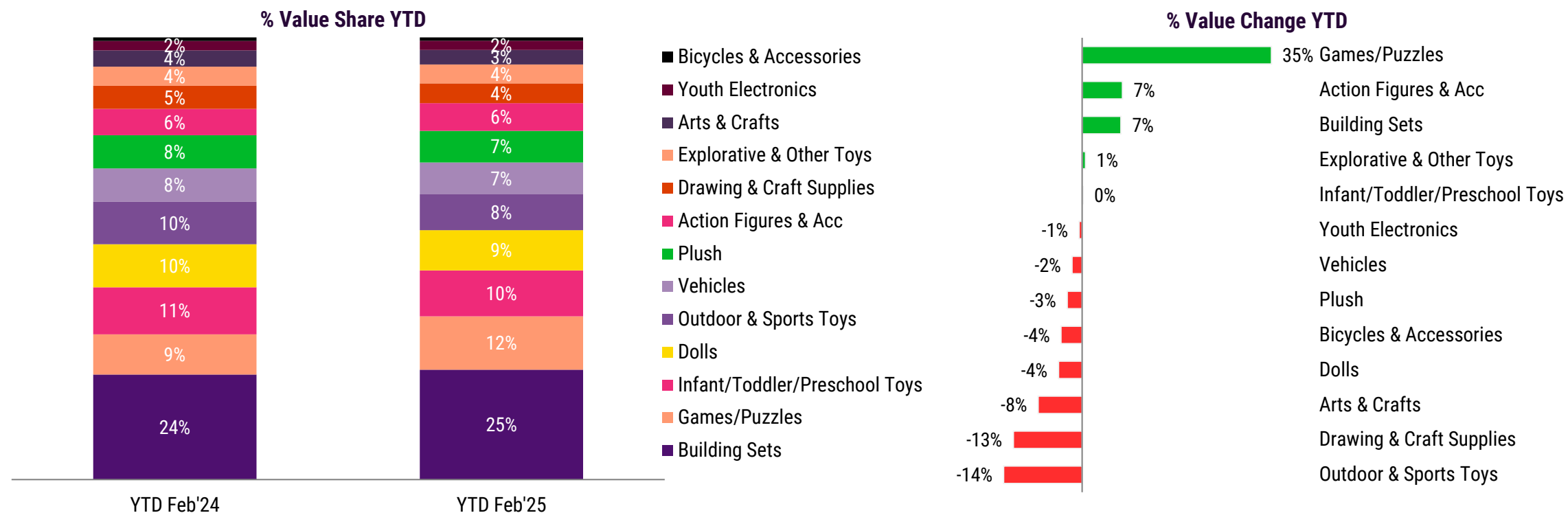
Corporate Manufacturers Trends

Pokémon, LEGO Botanicals and Hot Wheels were the top 3 properties for February 2025. Tonies was the #1 dollar gaining manufacturer for this month, followed by Mattel and Jazwares. For YTD February 2025, the top dollar gaining properties were Pokémon, Formula 1 and LEGO Fortnite, while the top 3 dollar gaining manufacturers were LEGO, Jazwares and Mattel. Outside of the top 10 corporate manufacturers ranked by dollar sales for YTD February 2025, Goliath Group, VR Distribution and Bandai were the next 3 that experienced growth vs. LY.



Category Trends

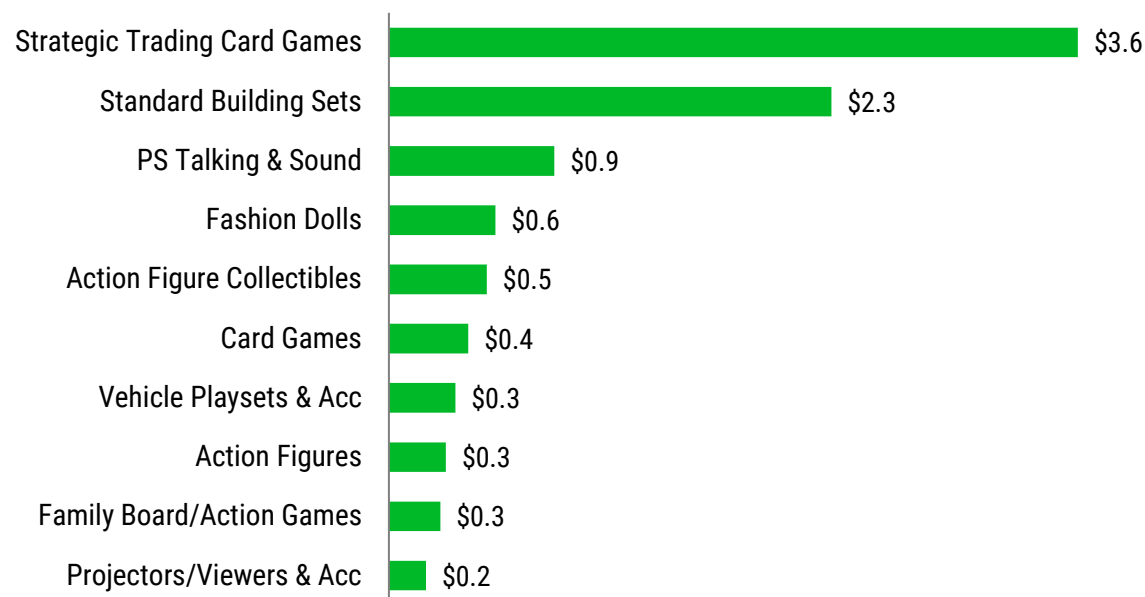
For the month February 2025 vs. LY, 6 categories grew, Games/Puzzles grew (+29%) driven from predominately Pokémon, Building Sets grew (+1%) driven from Formula 1, LEGO Harry Potter and Fortnite, Action Figs grew (+2%) driven from Mr Beast, Beyblade and WWE, Bicycles grew (+16%), Explorative & Other Toys grew (+2%) driven from Little Tikes and Bluey, and Vehicles grew (+1%) driven from Hot Wheels.



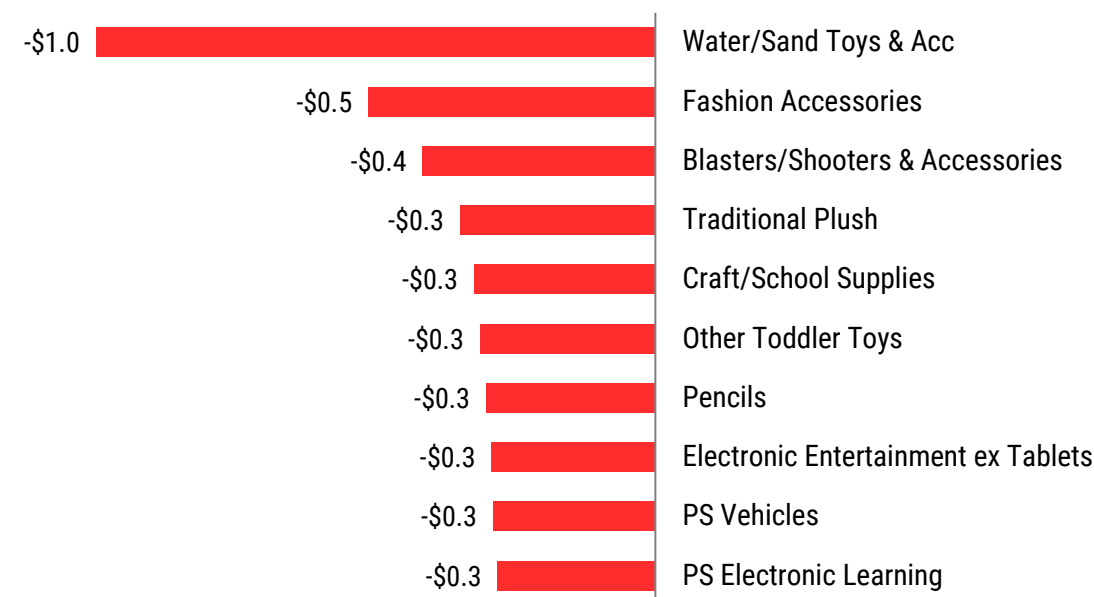
Subclass Trends

The top 3 subclass gainers for this month were Strategic Trading Card Games (+65%) driven from Pokémon, PS talking & Sounds (+>100%) driven from Toniebox and Standard Building Sets (+2%) driven from Formula 1, Harry Potter and Fortnite

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



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



Property Trends

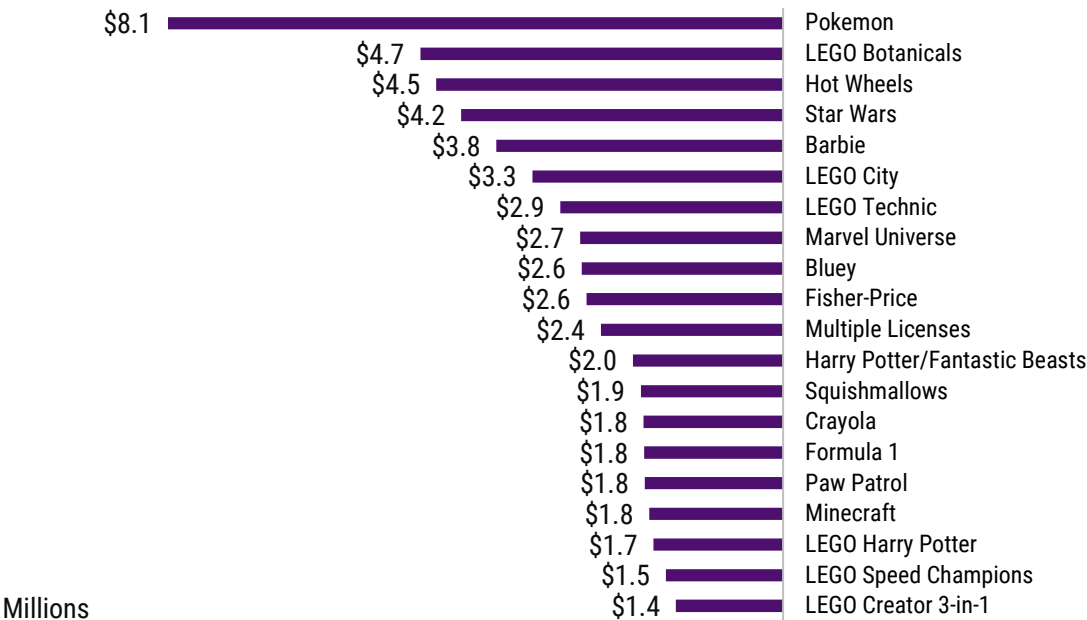
Top 5 Dollar Properties February '25

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

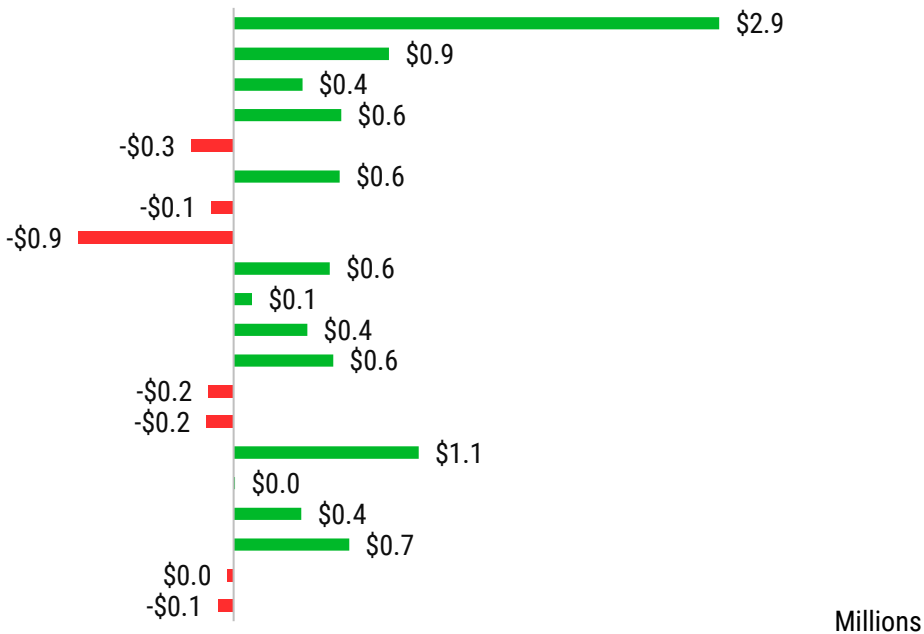
Top 5 Dollar Gaining Properties February '24 vs. February '25

- #1 – Pokémon
- #2 – Formula 1
- #3 – Toniebox
- #4 – LEGO Harry Potter
- #5 – LEGO Fortnite

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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