

ATA Report

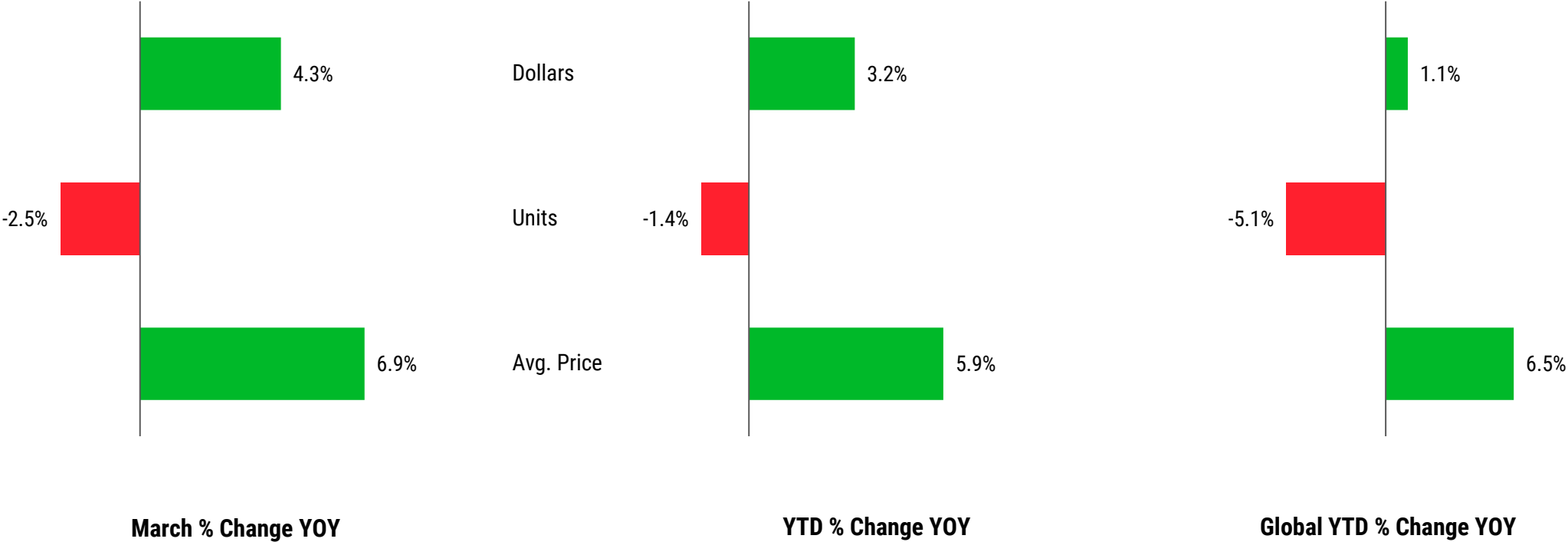
Mar 2025

Australia Toy Association



Industry Trends

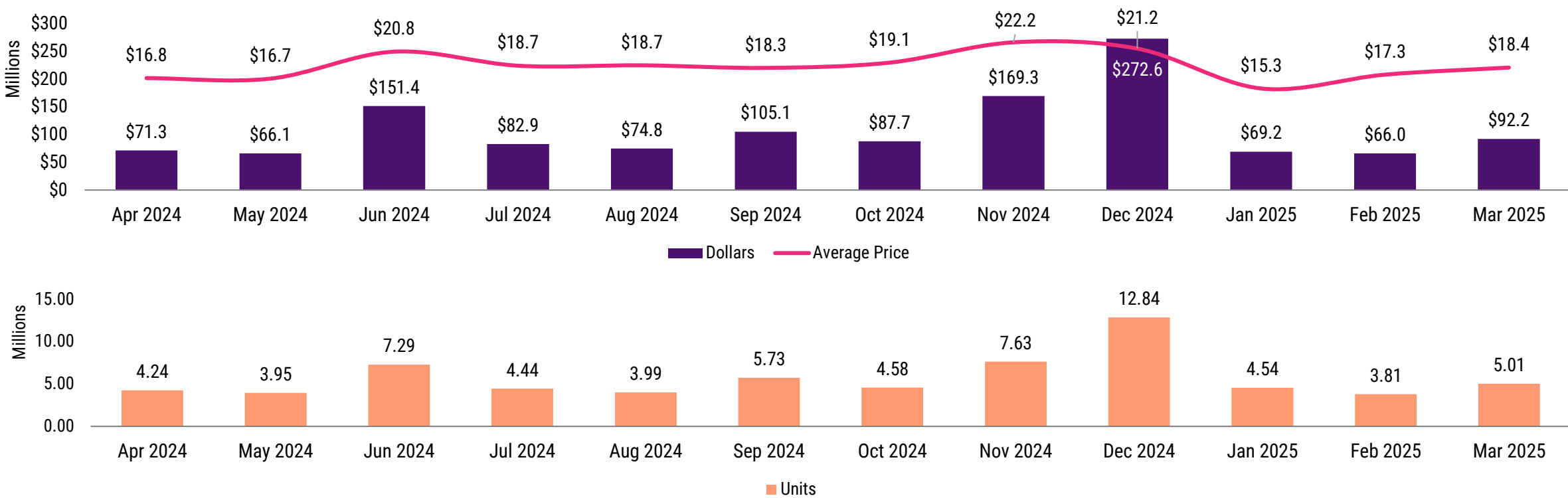
March 2025 experienced +4% in dollars, -2% in units and +7% in average price. Building Sets (+13%) was the top category gainer for this month, followed by games/Puzzles (+32%), Action Figures (+13%), Vehicles (+3%), Infant/Toddler/Preschool Toys (+2%) and Youth Electronics (+2%). Plush (-12%), Dolls (-7%) and Outdoor & Sports Toys (-8%) were the 3 largest category decliners for this month. For YTD March 2025 vs. LY, toys was up +3% in dollars, performing better than global toys market (+1%).



Monthly Trend

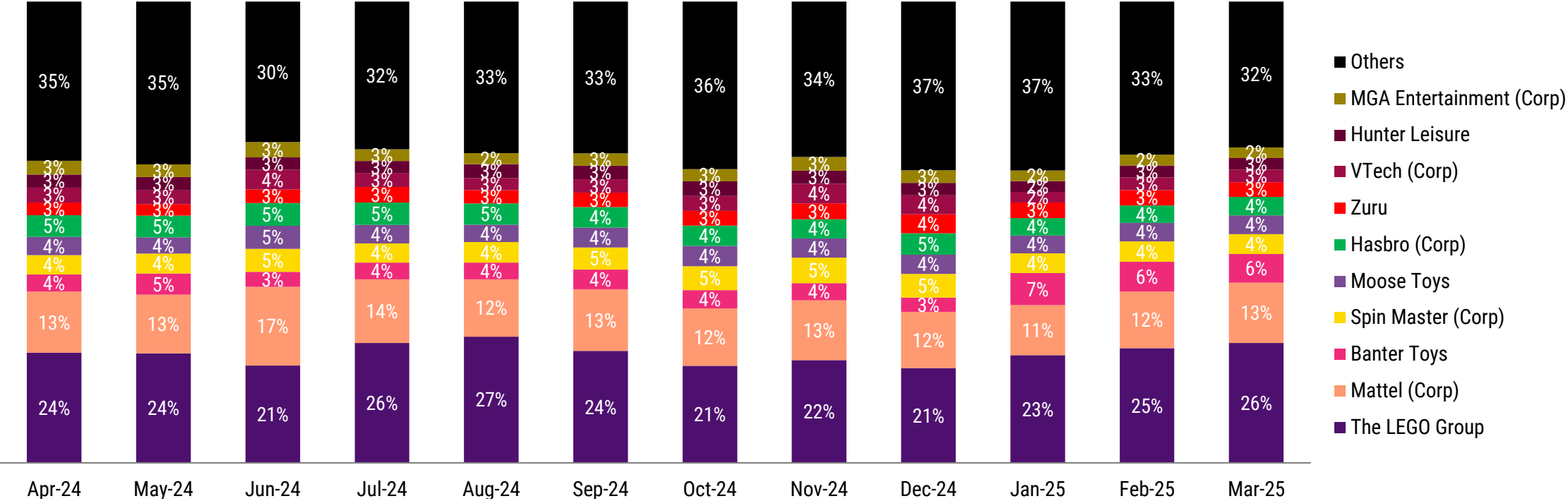
For March 2025, Building Sets (+13%) remained as the largest dollar category followed by Games/Puzzles (+32%), Infant/Toddler/Preschool Toys (+2%), dolls (-7%), vehicles (+3%) and Plush (-12%). Average Price was \$17.20 and grew +7% to \$18.39 driven from licensed and unlicensed toys.

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



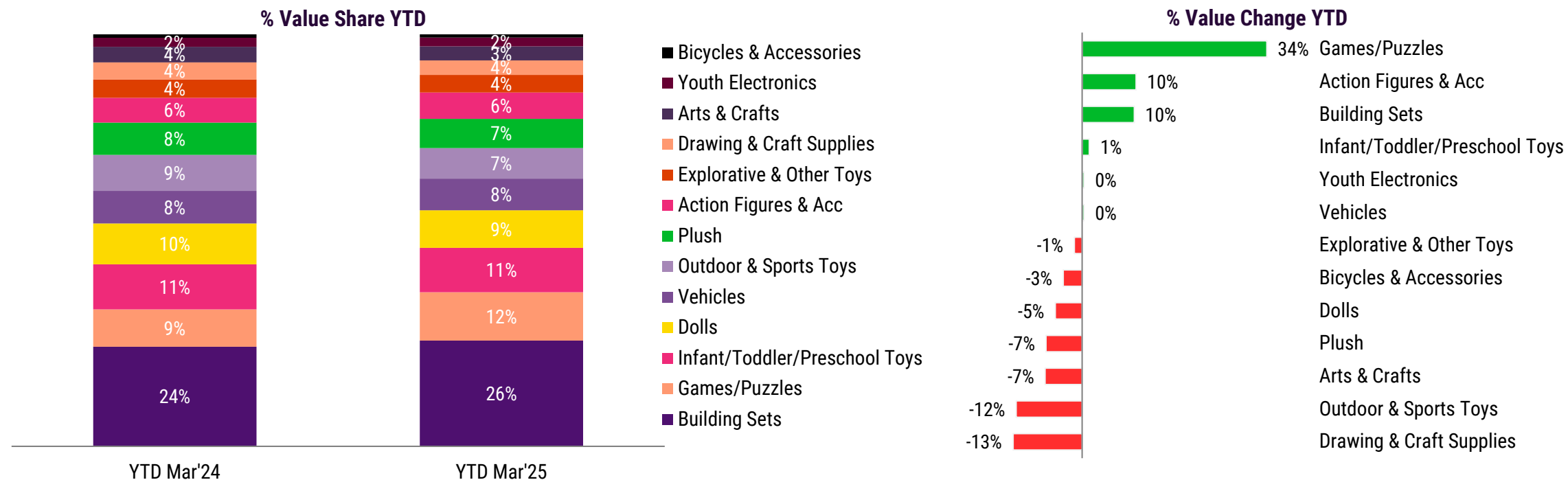
Corporate Manufacturers Trends

Pokémon, Formula 1 and Hot Wheels were the top 3 properties for March 2025. LEGO was the #1 dollar gaining manufacturer this month, followed by Mattel and Tonies. For YTD March 2025, the top dollar gaining properties were Formula 1, Pokémon and LEGO Speed Champions, while the top 3 dollar gaining manufacturer continued to be LEGO, Jazwares and Mattel. Outside of the top 10 corporate manufacturer ranked by dollars sales for YTD March 2025, TOMY, Tonies and VR Distribution were the next 3 that experienced dollar gains vs. LY.



Category Trends

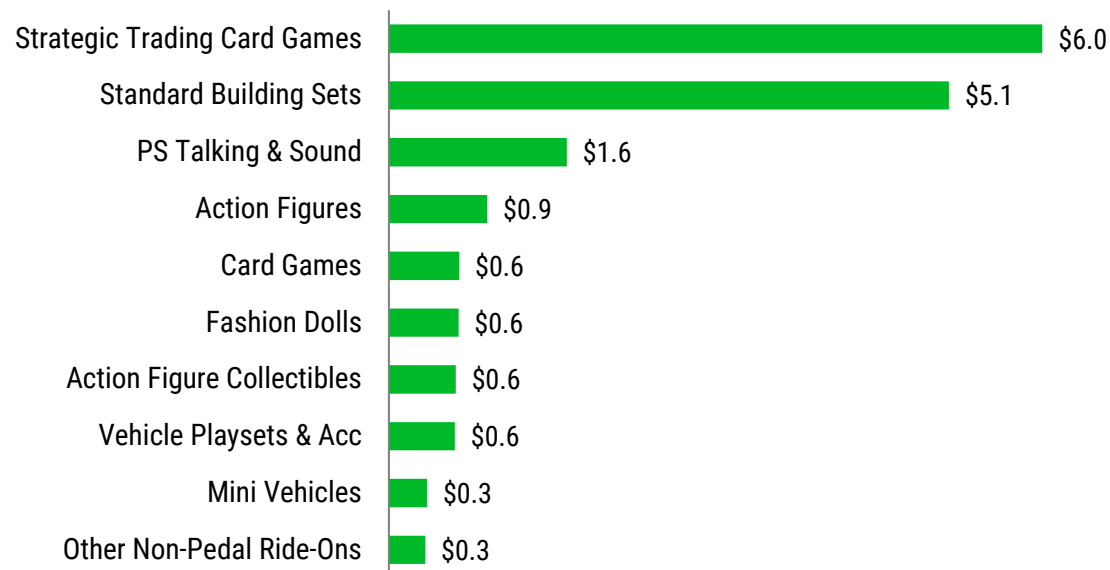
For the month March 2025 vs. LY, 6 categories grew, Buildings Sets (+13%) driven from Formula 1, LEGO Speed Champions and Fortnite, Games/Puzzles (+32%) driven from Pokémon, Action Figures (+13%) driven from MrBeast, Minecraft and Beyblade, Vehicles (+3%) driven from Hot Wheels, Infant/Toddler/Preschool Toys (+2%) driven from Toniebox and Youth Electronics (+2%) driven from Pets Alive.



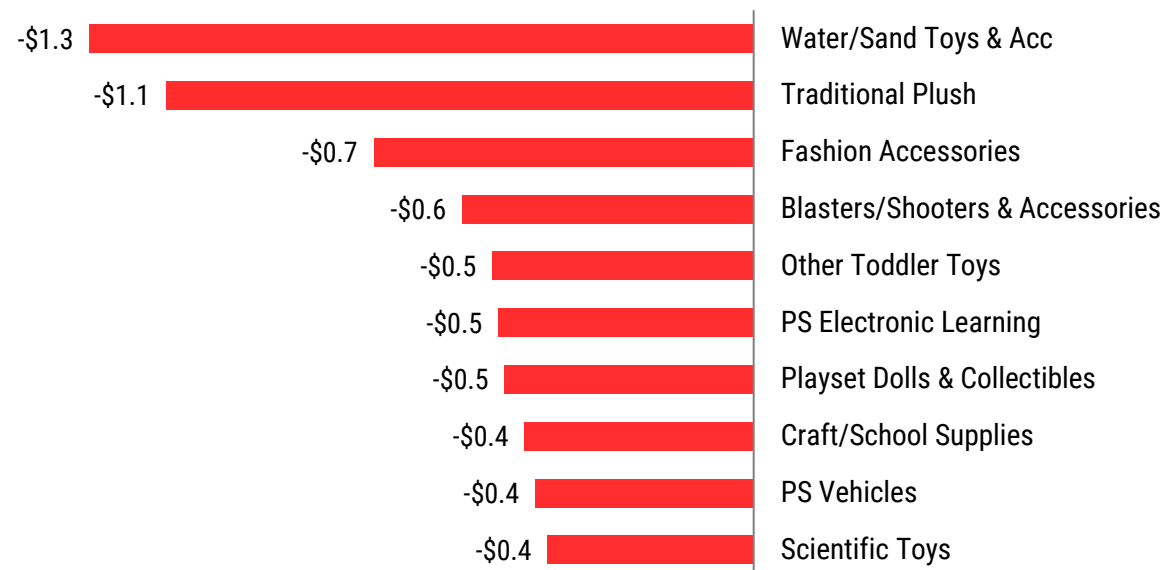
Subclass Trends

The top 3 subclass gainers for this month were Standard Building Sets (+13%) driven from Formula 1, LEGO Speed Champions and Fortnite, Strategic Trading Card Games (+87%) driven from Pokémon and PS Talking & Sound (+>100%) driven from TonieBox.

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



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



Property Trends

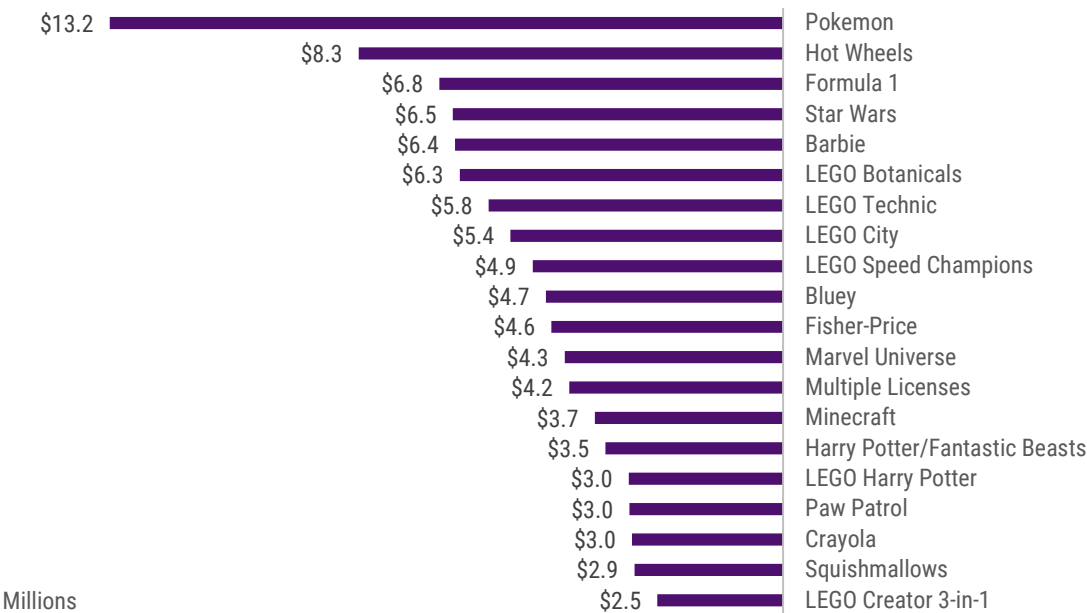
Top 5 Dollar Properties March '25

- #1 – Pokémon
- #2 – Formula 1
- #3 – Hot Wheels
- #4 – LEGO Speed Champions
- #5 – LEGO Technic

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

- #1 – Formula 1
- #2 – Pokémon
- #3 – LEGO Speed Champions
- #4 – Minecraft
- #5 – Toniebox

Top 20 Properties YTD



Millions

\$ Value Change vs YAG



Millions



Toys Australia YTD Mar 2025

For more information

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

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