

# ATA Report

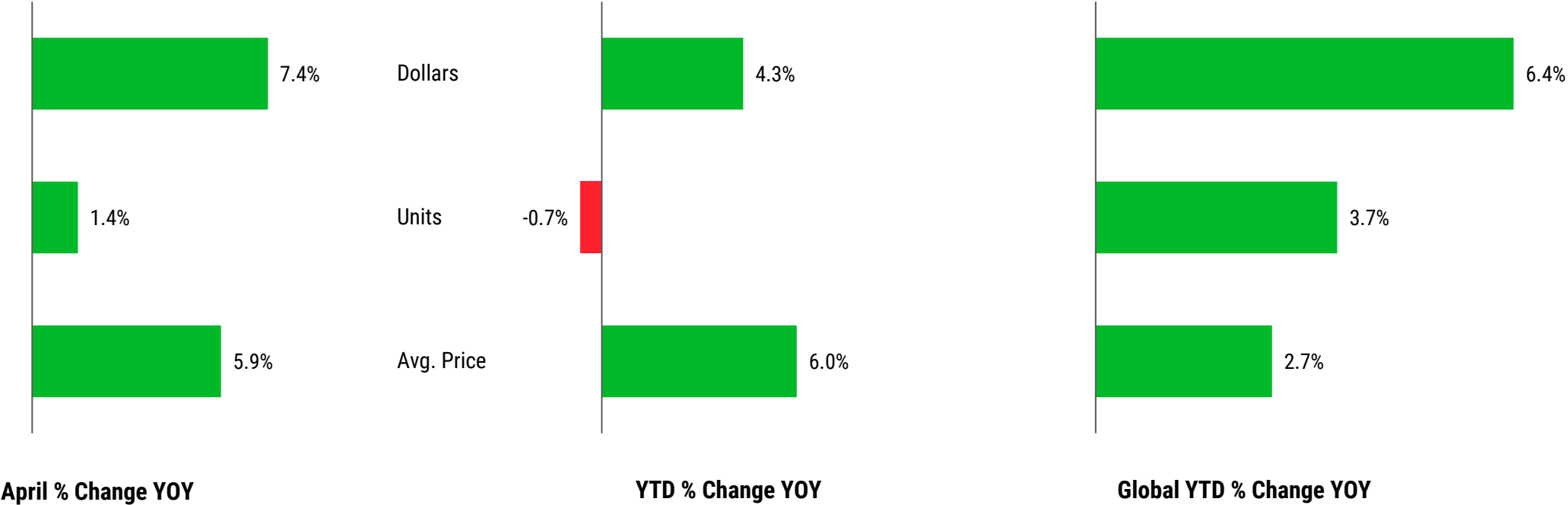
Apr 2025

Australia Toy Association



# Industry Trends

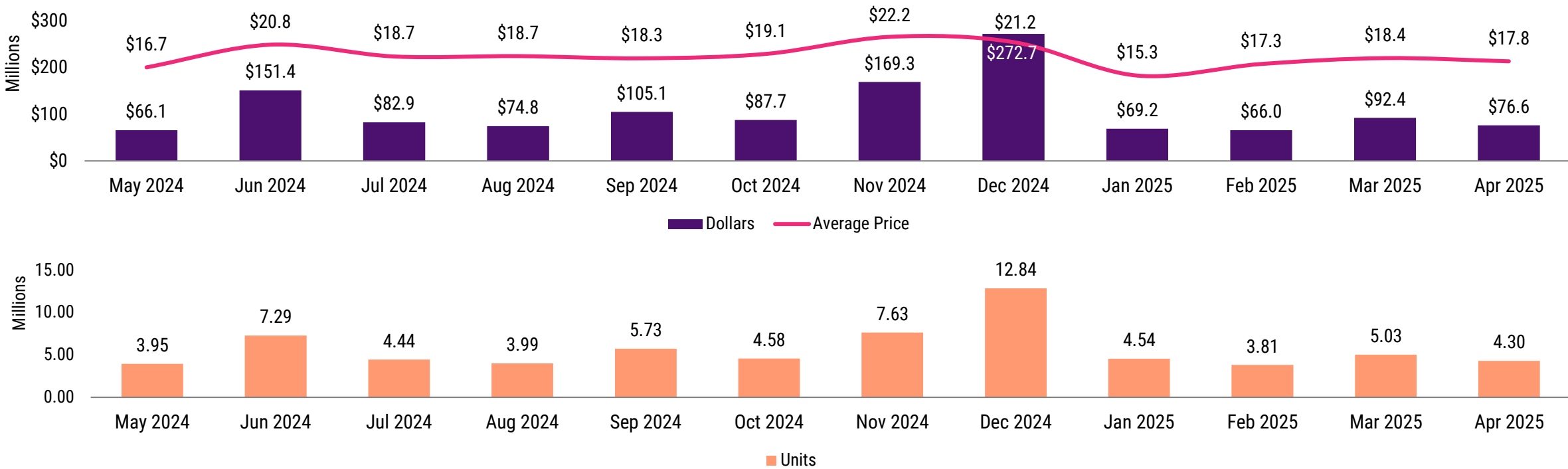
April 2025 experienced +7% in dollars, +1% in units and +6% in average price. Games/Puzzles (+54%) was the top category gainer for this month, followed by Buildings Sets (+15%), Action Figures (+19%), Bicycles (+33%), Outdoor and Sports Toys (+3%), Plush (+1%) and Youth Electronics (+1%). Dolls (-9%), Arts & Crafts (-10%) and Explorative and Other Toys (-8%) were the 3 largest category decliners for this month. For YTD April 2025 vs. LY, Australia Toys was up +4% in dollars meanwhile globally toys market was up (+6%).



# Monthly Trend

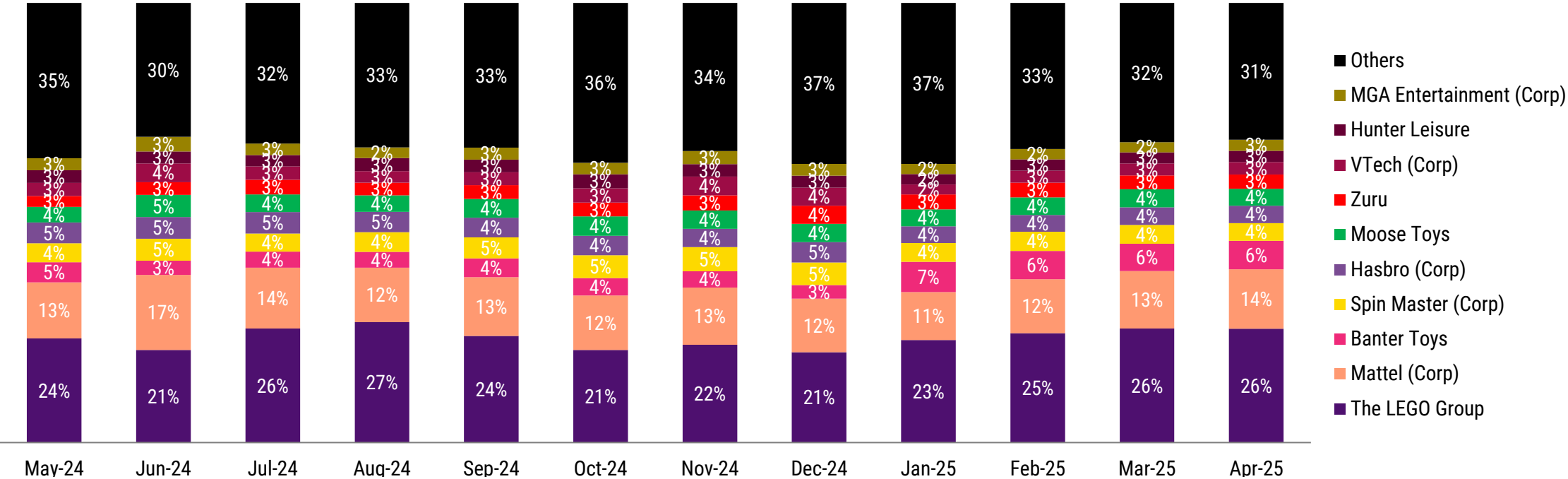
For April 2025, Buildings Sets (+15%) remained as the largest dollar category followed by Games/Puzzles (+54%), Infant/Toddler/Preschool Toys (-2%), dolls (-9%), Vehicles (-4%) and Plush (+1%). Average Price was \$16.81 and grew +6% to \$17.81 driven from both licensed and unlicensed toys.

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



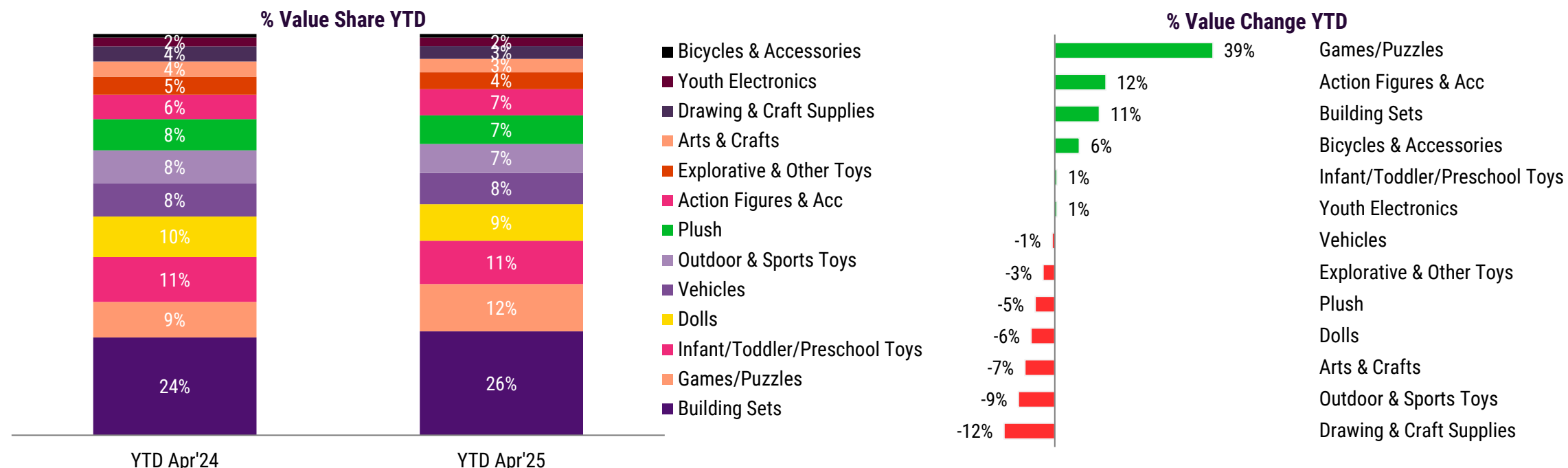
# Corporate Manufacturers Trends

Pokémon, Formula 1 and Hot Wheels remain the top 3 properties for April 2025. LEGO was the #1 dollar gaining manufacturer this month, followed by Banter Toys and Mattel. For YTD April 2025, the top dollar gaining properties continued to be Formula 1, Pokémon and LEGO Speed Champions, and the top 3 dollar gaining manufacturer were LEGO, Banter Toys and Mattel. Outside of the top 10 manufacturer ranked by dollar sales for YTD April 2025, Modern Brands, VR Distribution and Bandai were the next 3 that experienced growth compared to LY.



# Category Trends

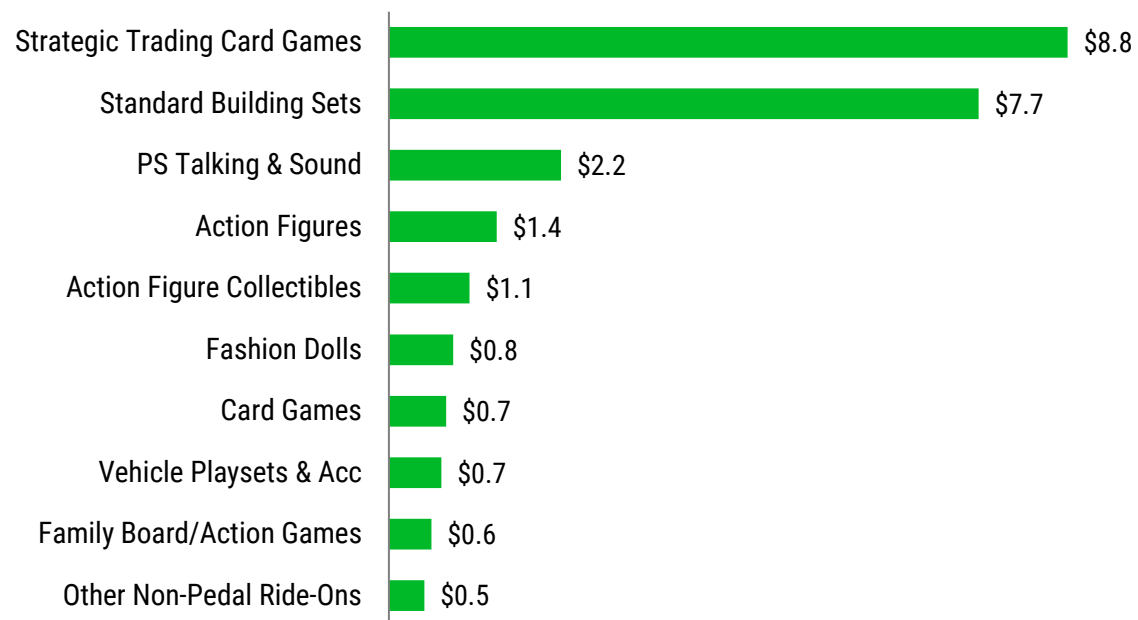
For the **Month of April 2025** vs. LY, 7 categories grew, Games/Puzzles (+54%) driven from predominately Pokémon, Buildings Sets (+15%) driven from Formula 1, LEGO Speed Champions and Minecraft, Action Figures (+19%) driven from Minecraft, MrBeast and Beyblades, Bicycles (+33%), Outdoor & Sports Toys (+3%) driven from X-shot, Minecraft and Bluey, Plush (+1%) driven from Jellycat, Minecraft and Squishmallows and Youth Electronics (+1%) driven from Pets Alive and LeapPad Tablets.



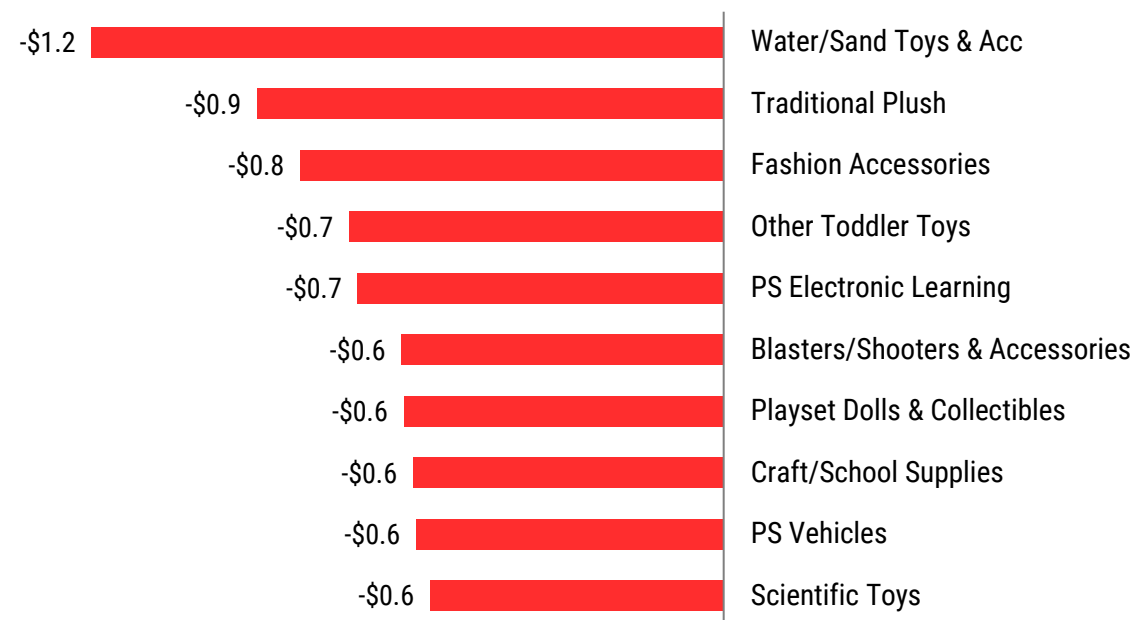
# Subclass Trends

The top 3 subclass gainers for this month were Strategic Trading Card Games (+>100%) driven from Pokémon, Standard Building Sets (+15%) driven from Formula 1, LEGO Speed Champions and Minecraft 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

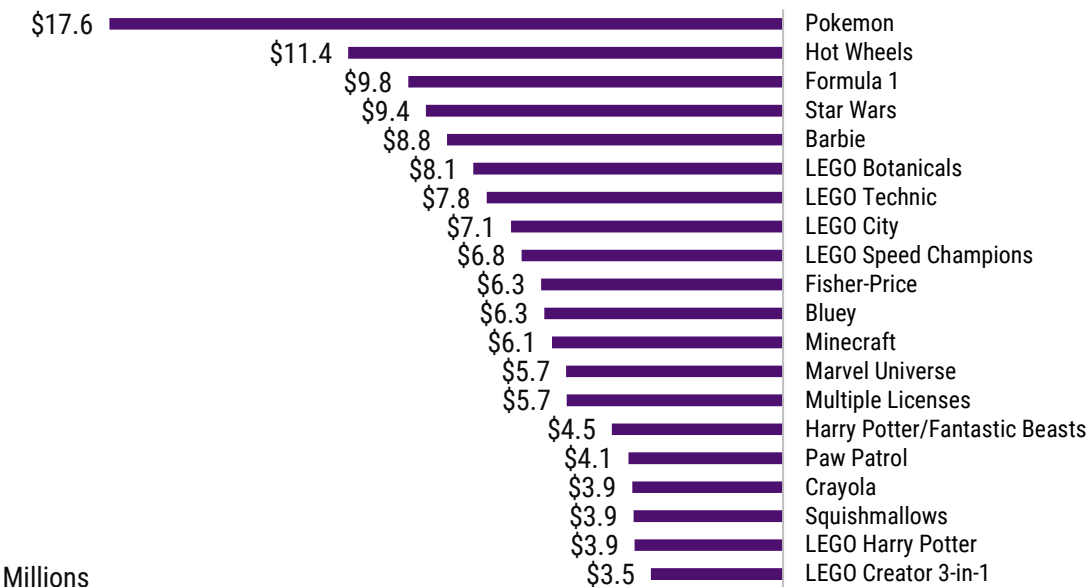
## Top 5 Dollar Properties April '25

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

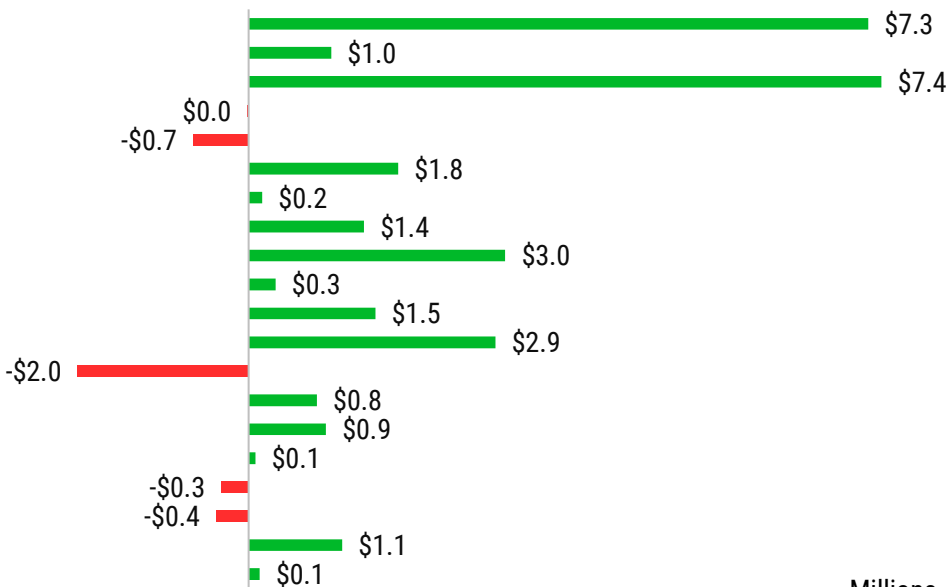
## Top 5 Dollar Gaining Properties April '25 vs. April '24

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

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](mailto:HelpDesk@circana.com), or your account representative below.

**Amelia Eng**

Senior Account Manager

[Amelia.Eng@circana.com](mailto:Amelia.Eng@circana.com)

+61 418 500 547

**Jim Thach**

Account Manager

[Jim.Thach@circana.com](mailto:Jim.Thach@circana.com)

+61 428 001 154

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