

ATA Report

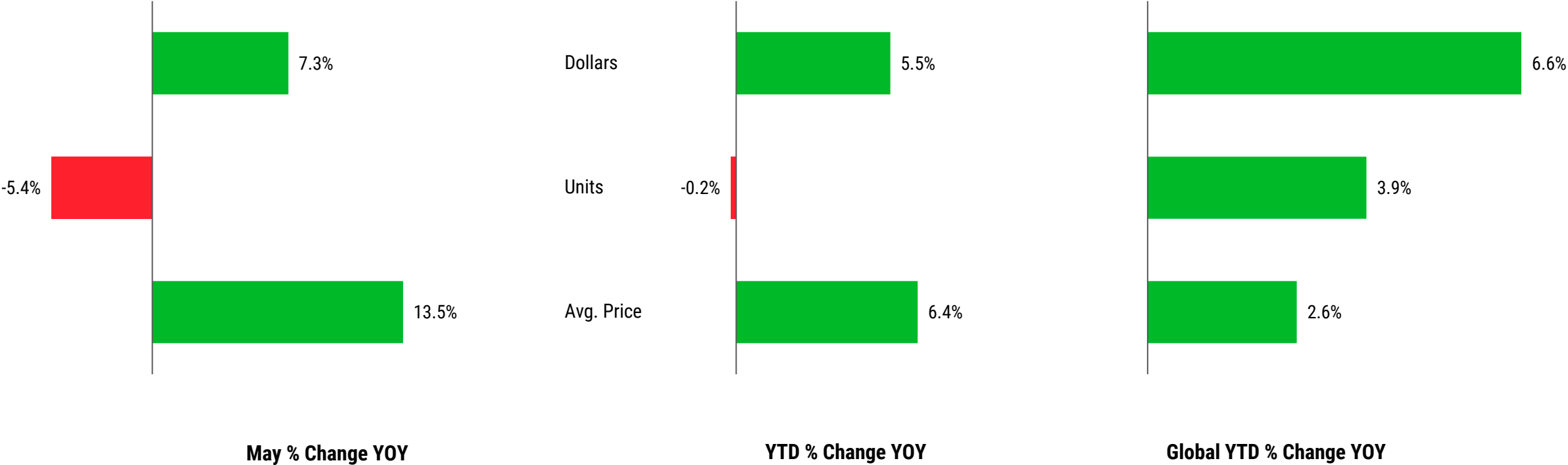
May 2025

Australia Toy Association



Industry Trends

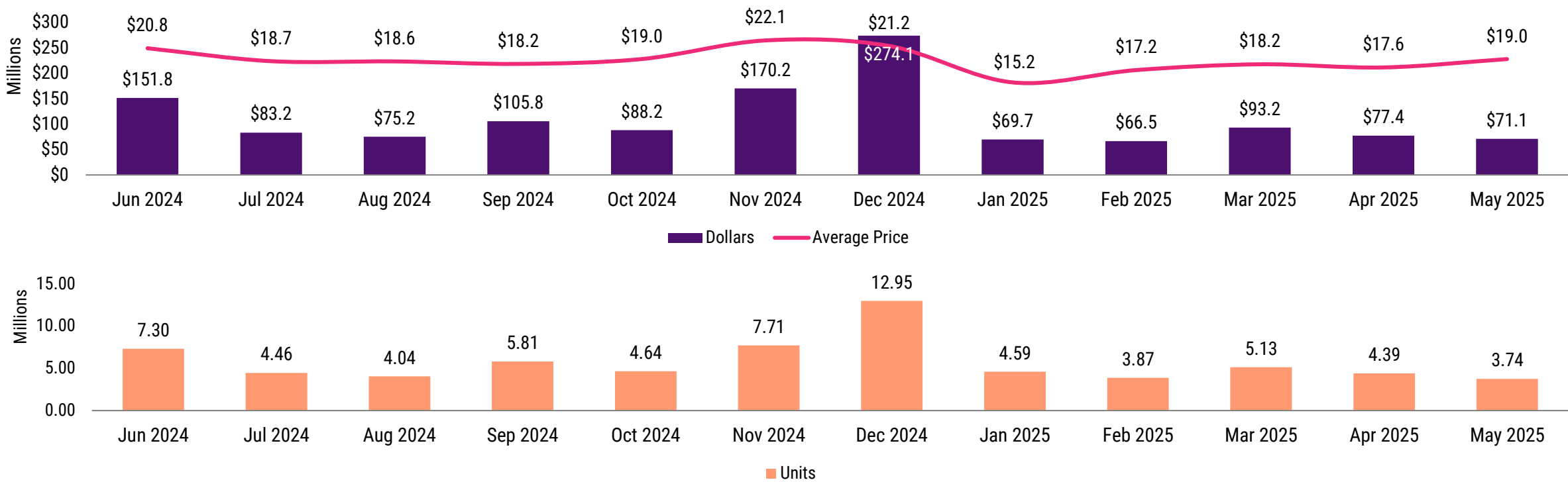
May 2025 experienced +7% in dollars, -5% in units and +14% in average price. Games/Puzzles (+50%) was the top category gainer for this month, followed by Building Sets (+6%), Action Figures (+19%), Infant/Toddler/Preschool Toys (+7%), Bicycles (+42%), Vehicles (+1%), Youth Electronics (+2%), Outdoor & Sports Toys (+1%). Dolls (-6%), Arts & Crafts (-9%) and Drawing & Crafts Supplies (-12%) were the 3 top decliners for this month, For YTD May 2025 vs. LY, Australia Toys was up +5% in dollars meanwhile globally toys was up +7%.



Monthly Trend

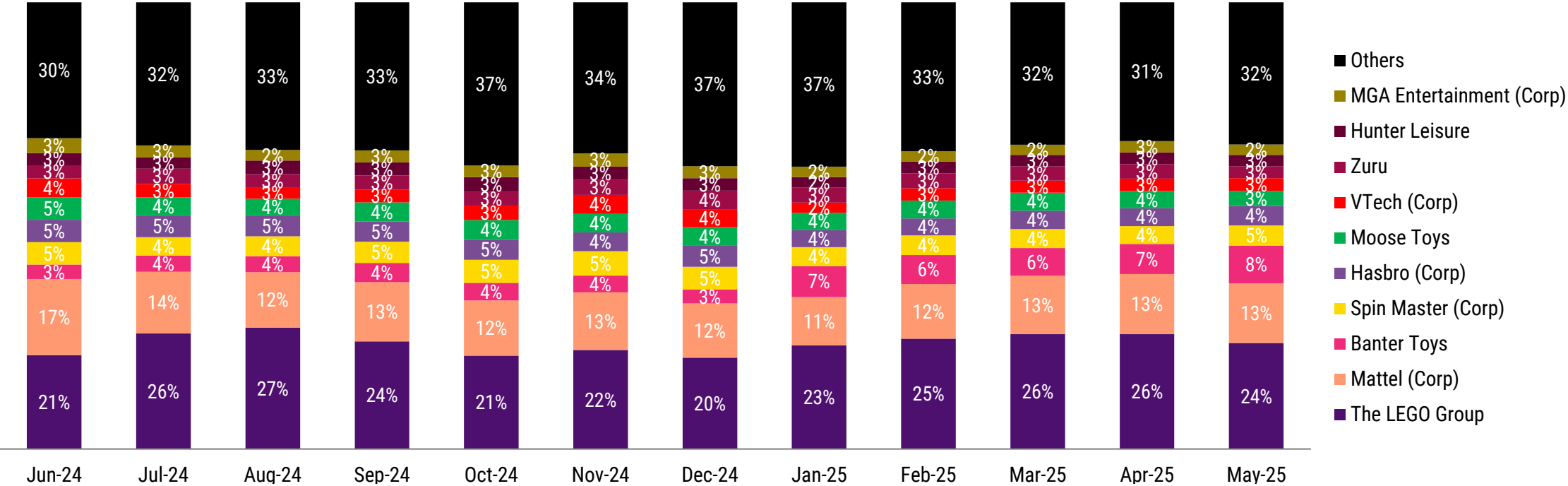
For May 2025, Building Sets (+6%) remained as the largest dollar category followed by Games/Puzzles (+50%), Infant/Toddler/Preschool Toys (+7%), Dolls (-6%), vehicles (+1%) and Plush (Flat). Average price was \$16.74 and grew +14% to \$19.00 driven from both licensed and unlicensed toys.

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



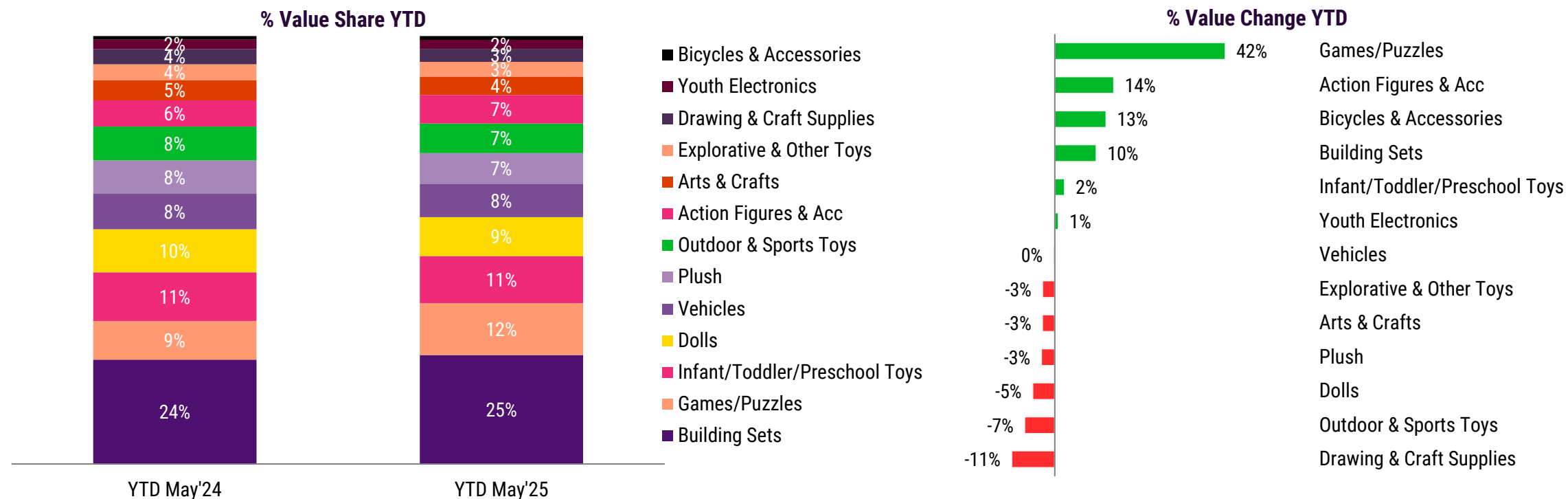
Corporate Manufacturers Trends

Pokémon, Star Wars and Hot Wheels are the top 3 properties for May 2025. Banter Toys was the top dollar gaining manufacturer this month, followed by LEGO and Mattel. For YTD May 2025, the top dollar gaining properties are Pokémon, Formula 1 and Minecraft, and the top 3 dollar gaining manufacturers were LEGO, Banter Toys and Mattel. Outside of the top 10 manufacturers ranked by dollar sales for YTD May 2025, Modern Brands, Bandai and VR Distribution were the next 3 that experience growth compared to LY.



Category Trends

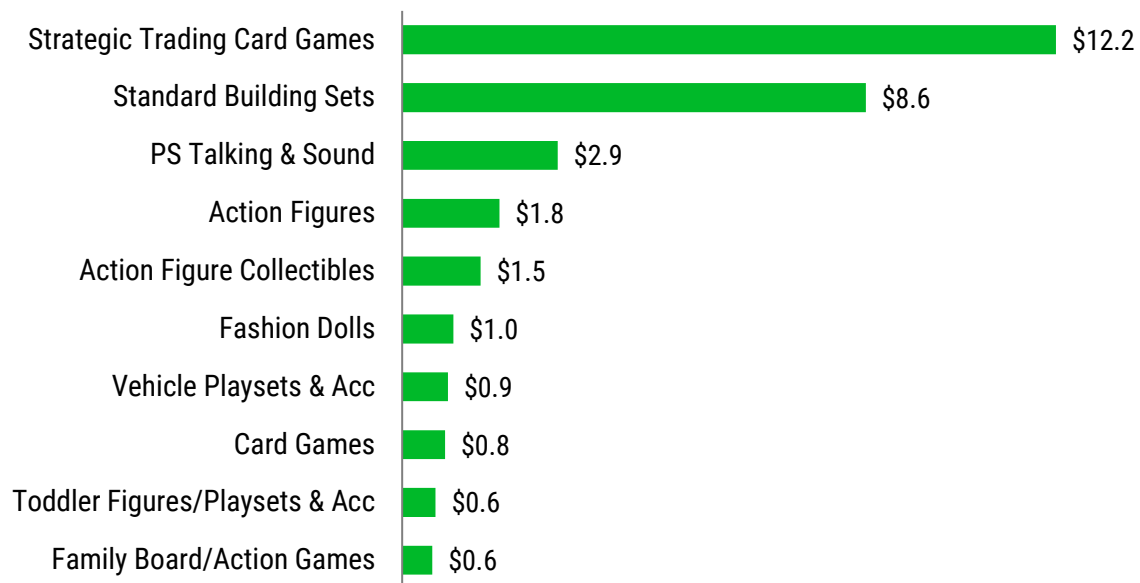
For the **Month of May 2025** vs. LY, 8 categories grew, Games/Puzzles (+50%) driven from predominately Pokémon, Building Sets (+6%) driven from Formula 1, LEGO Botanicals and Star Wars, Action Figures (+19%) driven from Minecraft, Beyblade and MrBeast, Infant/Toddler/Preschool Toys (+7%) driven from Toniebox and Fisher-Price, Bicycles (+42%), Vehicles (+1%) driven from Hot Wheels, Youth Electronics (+2%) driven from Pets Alive and Magic Adventures and Outdoor Sports Toys (+1%) driven from Minecraft and X-Shot.



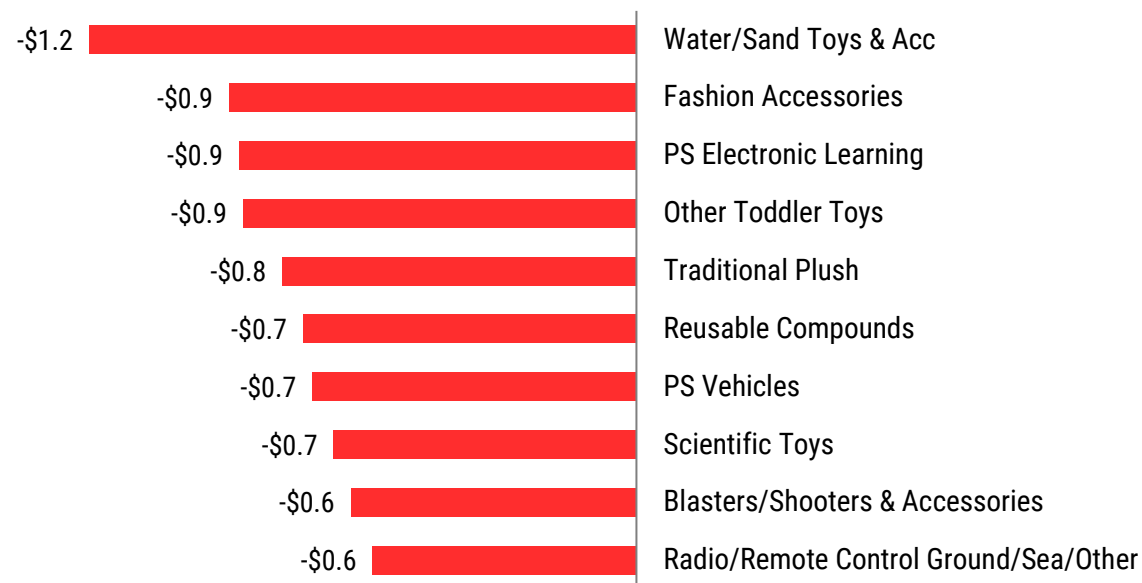
Subclass Trends

The top 3 subclass gainers for this month were Strategic Trading Card Games (+>100%) driven from Pokémon, Standard Building Sets (+7%) driven from Formula 1, LEGO Botanicals and Star Wars 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)



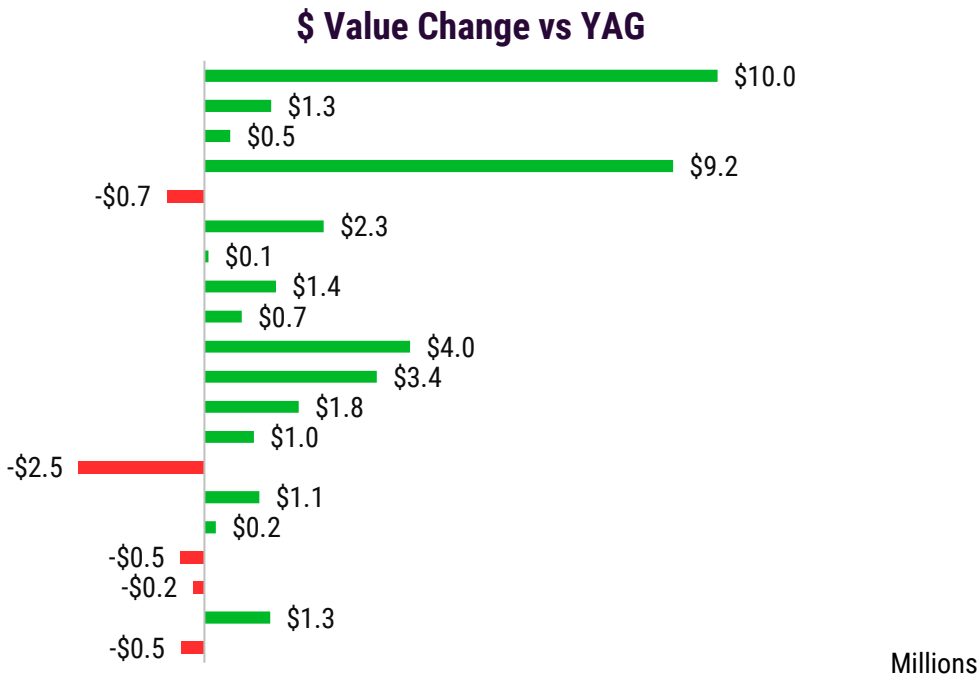
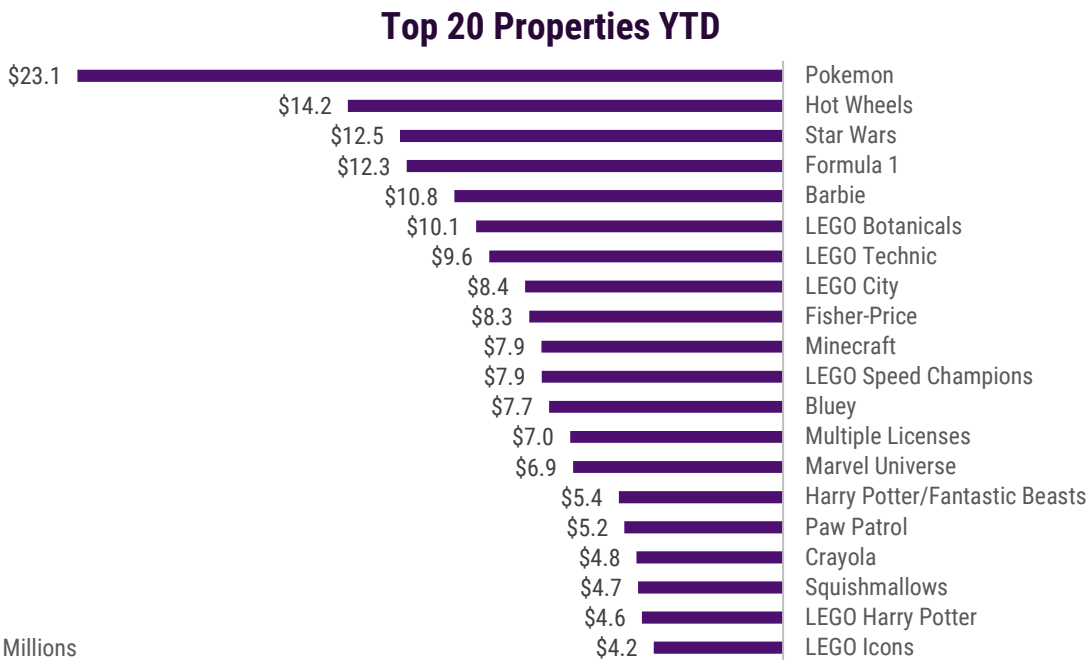
Property Trends

Top 5 Dollar Properties May '25

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

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

- #1 – Pokémon
- #2 – Formula 1
- #3 – Minecraft
- #4 – Lilo And Stitch
- #5 – Toniebox



For more information

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

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