

# ATA Report

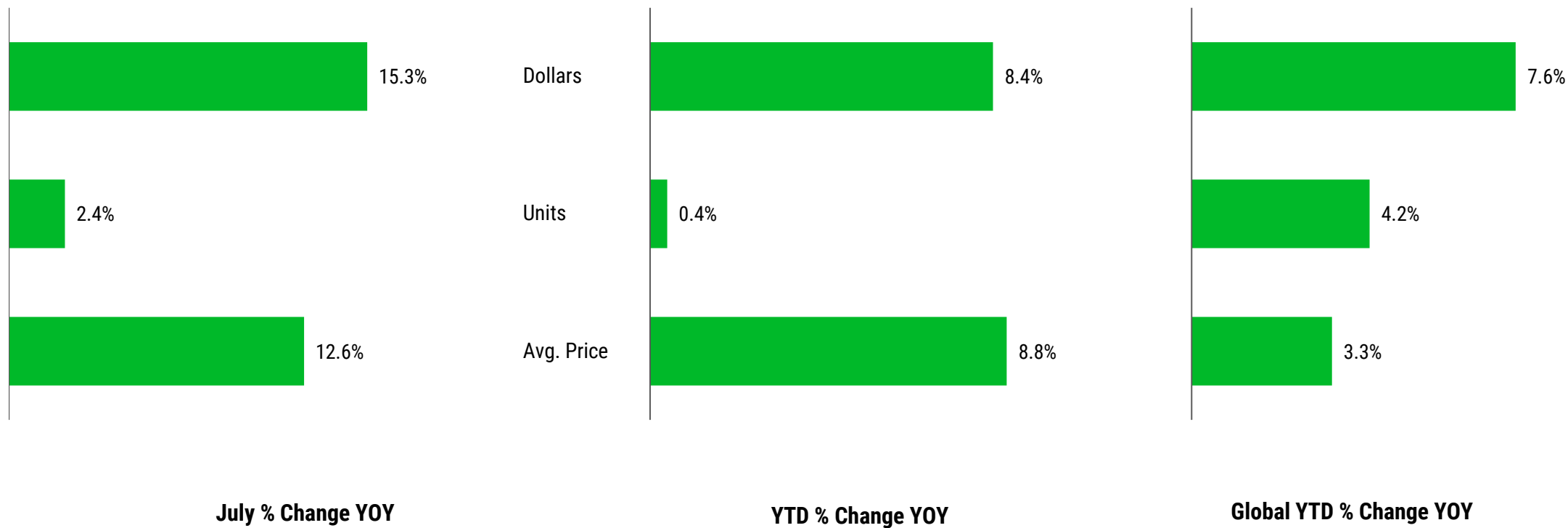
Jul 2025

Australia Toy Association



# Industry Trends

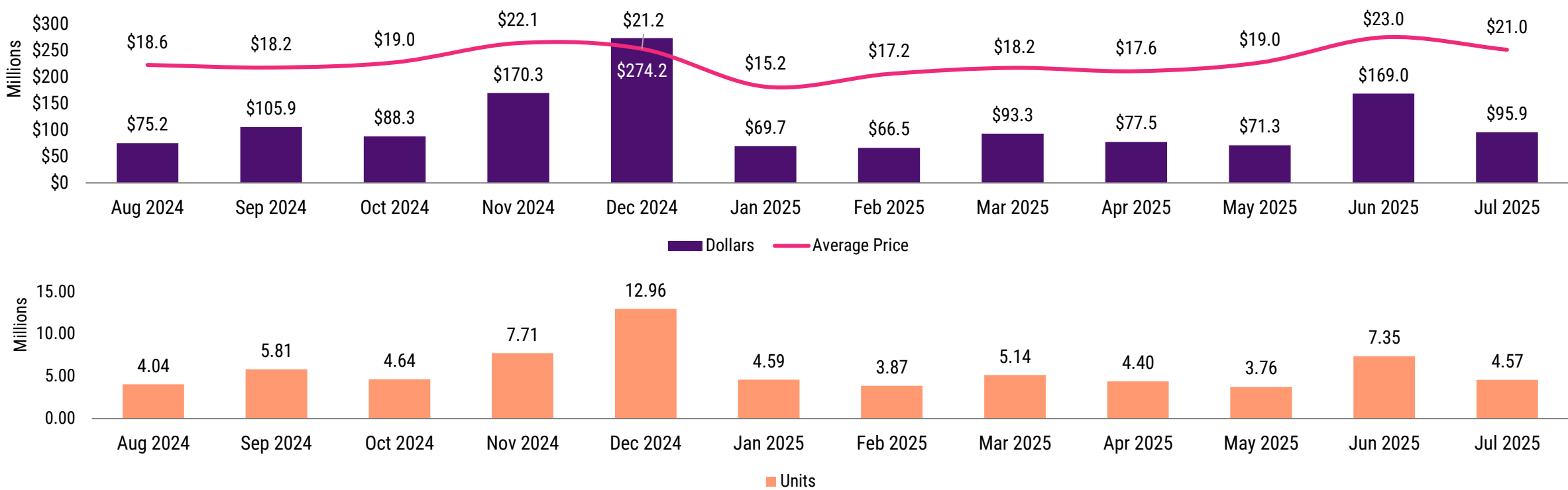
July 2025 experienced +15% growth in dollars, 2% in units and +13% in average price. Games/Puzzles (+82%) was the top category gainer for this month, followed by Building Sets (+17%), Infant/Toddler/Preschool Toys (+17%), Explorative & Other Toys (+18%), Vehicles (+7%), Action Figures (+7%), Arts & Crafts (+9%) and Bicycles (+37%). Dolls (-5%) and Plush (-7%) were the 2 decliners for this month. For YTD July 2025 vs. LY, Australia toys growth was up +8%, aligned with global toys growth.



# Monthly Trend

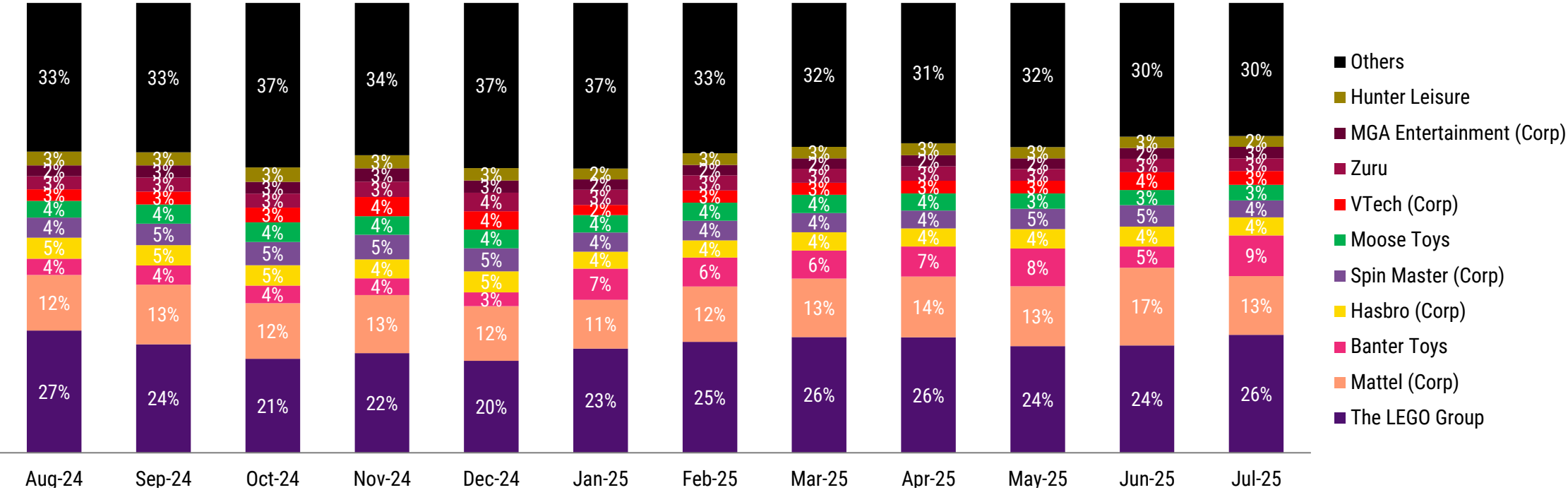
For July 2025, Building Sets (+17%) remained as the largest dollar category followed by Games/Puzzles (+82%), Infant/Toddler/Preschool Toys (+17%), Dolls (-5%), Vehicles (+7%) and Action Figures (+7%). Average Price was \$18.67 and grew +13% to \$21.02 driven from both licensed and unlicensed toys.

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



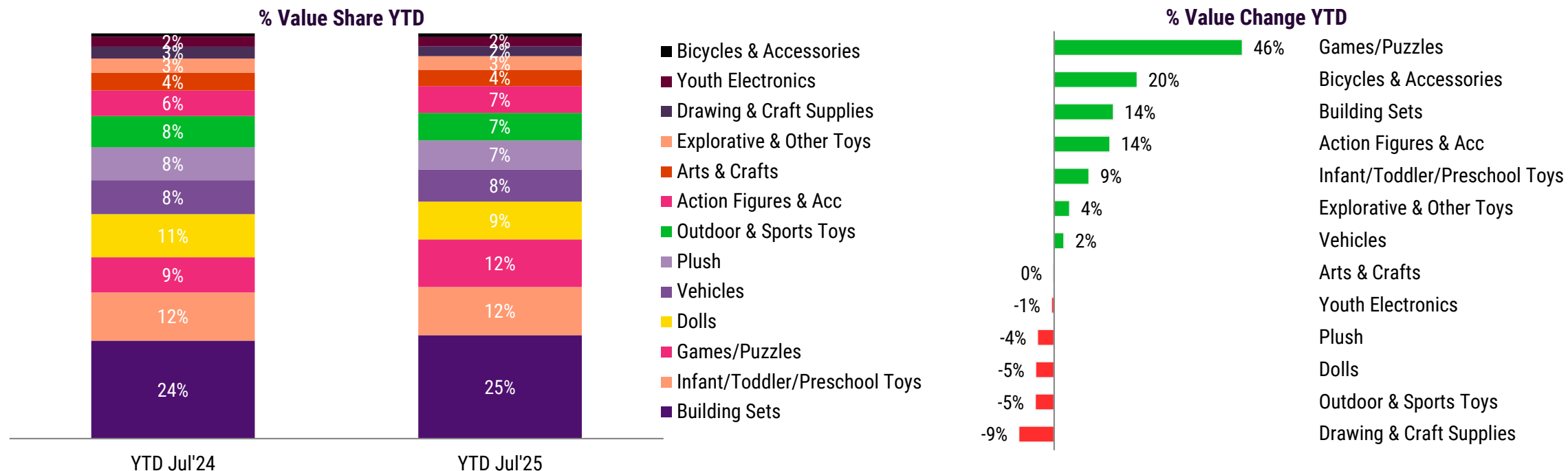
# Corporate Manufacturers Trends

Pokémon, Star Wars and Hot Wheels are the top 3 properties for July 2025. Banter Toys was the top dollar gaining manufacturer this month, followed by LEGO and Mattel. For YTD July, the top dollar gaining properties continue to be Pokémon, Formula 1 and Toniebox and the top 3 dollar gaining manufacturers were LEGO, Banter and Mattel. Outside of the top 10 manufacturers for YTD July 2025, Tonies, Modern Brands and Just Play Products were the next 3 that experience growth compared to LY.



# Category Trends

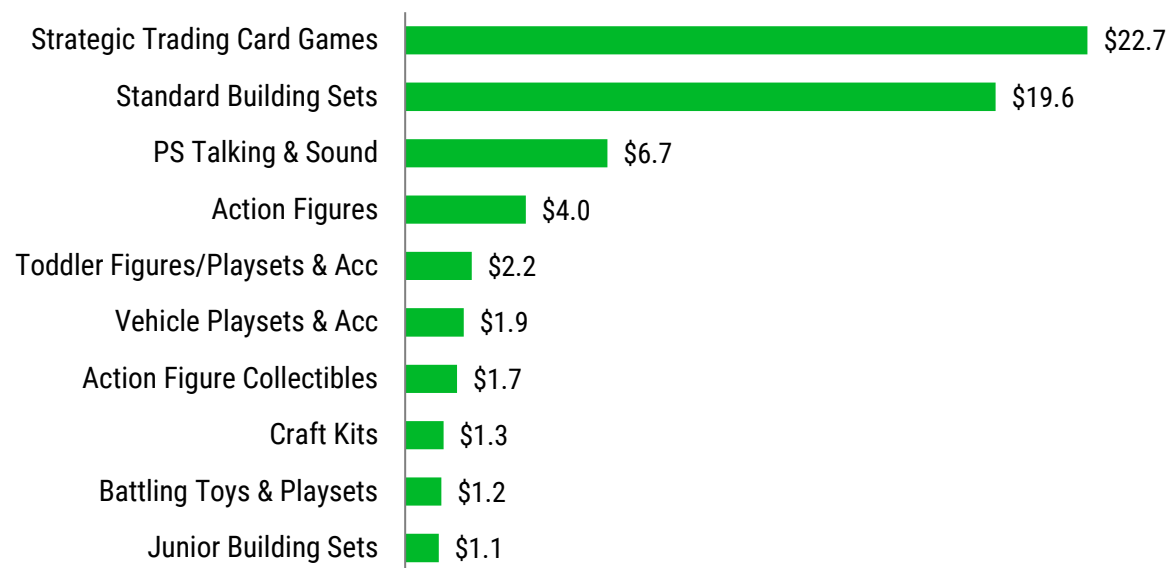
For the month of July 2025 vs. LY, 11 categories grew, Games/Puzzles (+82%) driven from Pokémon, Building Sets (+17%) driven from Formula 1 and Star Wars, Infant/Toddler/Preschool Toys (+17%) driven from Toniebox and Vtech Baby, Explorative & Other Toys (+18%) driven from Miniverse and AFL, Vehicles (+7%) driven from Hot Wheels, Action Figs (+7%) driven from Jurassic Park/World and Beyblade, Arts & Crafts (+9%) driven from Sticki Rolls and LEGO Art, Bicycles (+37%), Youth Electronics (+4%) driven from Little Live and Pets Alive, Outdoor & sports (+1%) and Drawings & Crafts Supplies (+2%).



# Subclass Trends

The top 3 subclass gainers for this month were Strategic Trading Card Games (>100%) driven from Pokémon, Standard Building Sets (+17%) driven from Formula 1, Star Wars and Fortnite 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

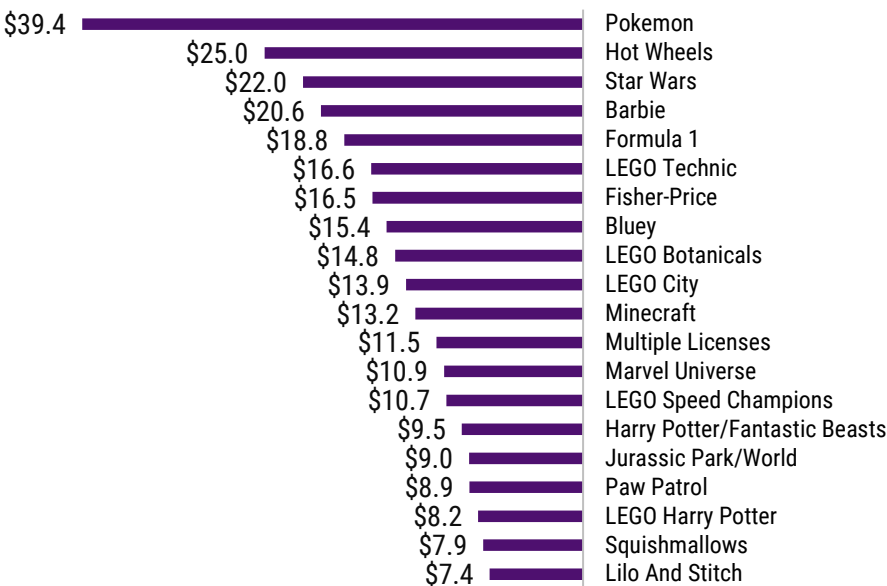
## Top 5 Dollar Properties July '25

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

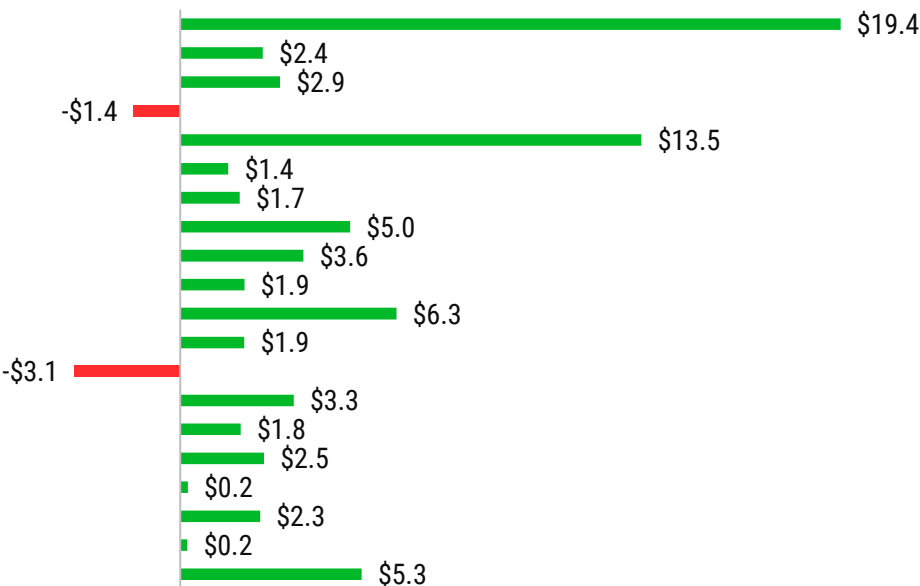
## Top 5 Dollar Gaining Properties July '25 vs. July '24

- #1 – Pokémon
- #2 – Formula 1
- #3 – Jurassic Park/World
- #4 – Toniebox
- #5 – Bluey

Top 20 Properties YTD



\$ Value Change vs YAG



Millions

Millions



Toys Australia YTD Jul 2025

## 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.

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