

ATA Report

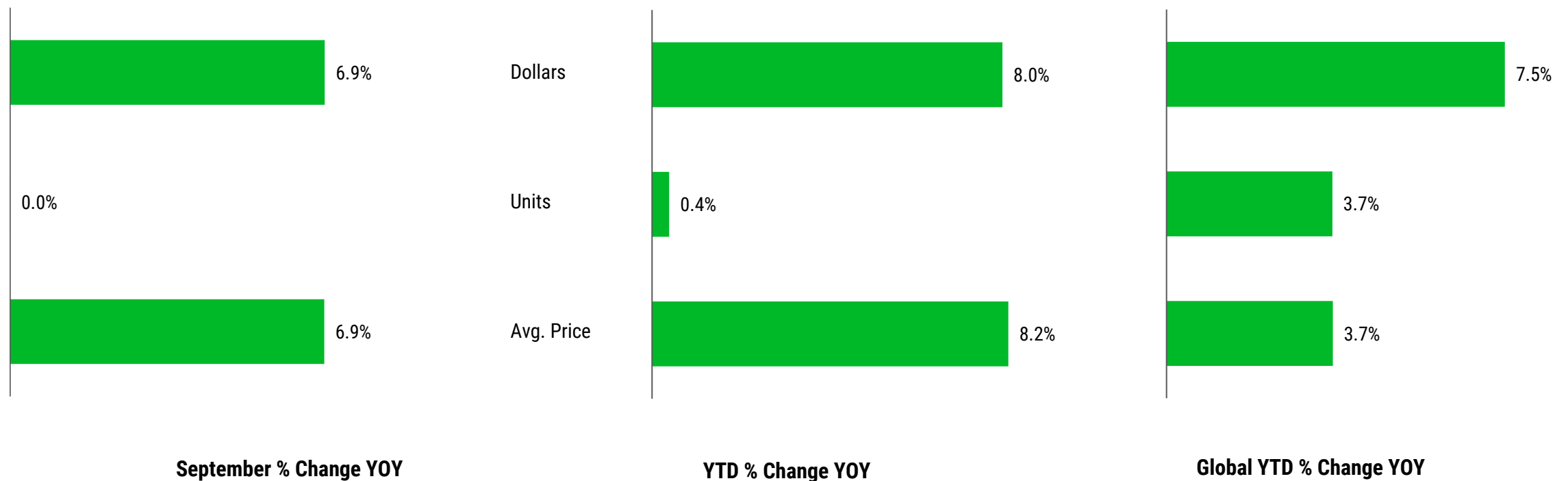
Sep 2025

Australia Toy Association



Industry Trends

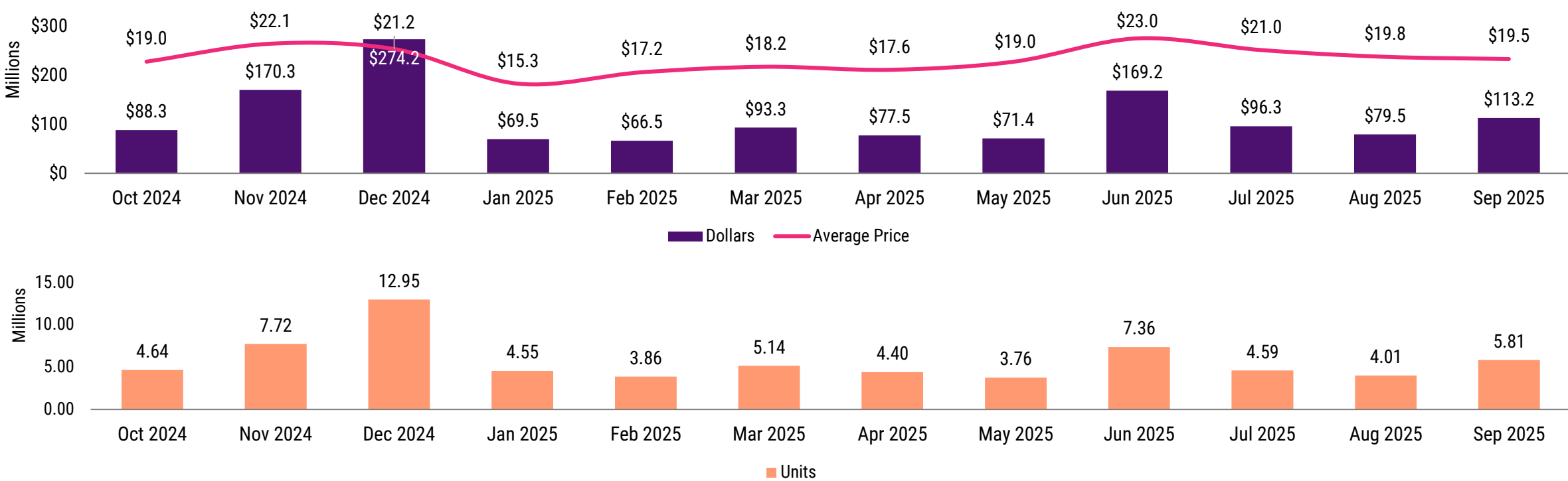
September 2025 experienced +7% growth in dollars, flat in units and +7% in average price. Games/Puzzles (+53%) was the top category gainer for this month, followed by Building Sets (+10%), Vehicles (+8%), Infant/Toddler/Preschool Toys (+5%), Youth Electronics (+20%), Action Figures (+5%), Bicycles (+26%) and Explorative & other Toys (+3%). Dolls (-19%) and Plush (-5%) were the top 2 decliners for this month. For YTD September 2025 vs. LY, Australia Toys growth continues at +8%, aligning with global toys market.



Monthly Trend

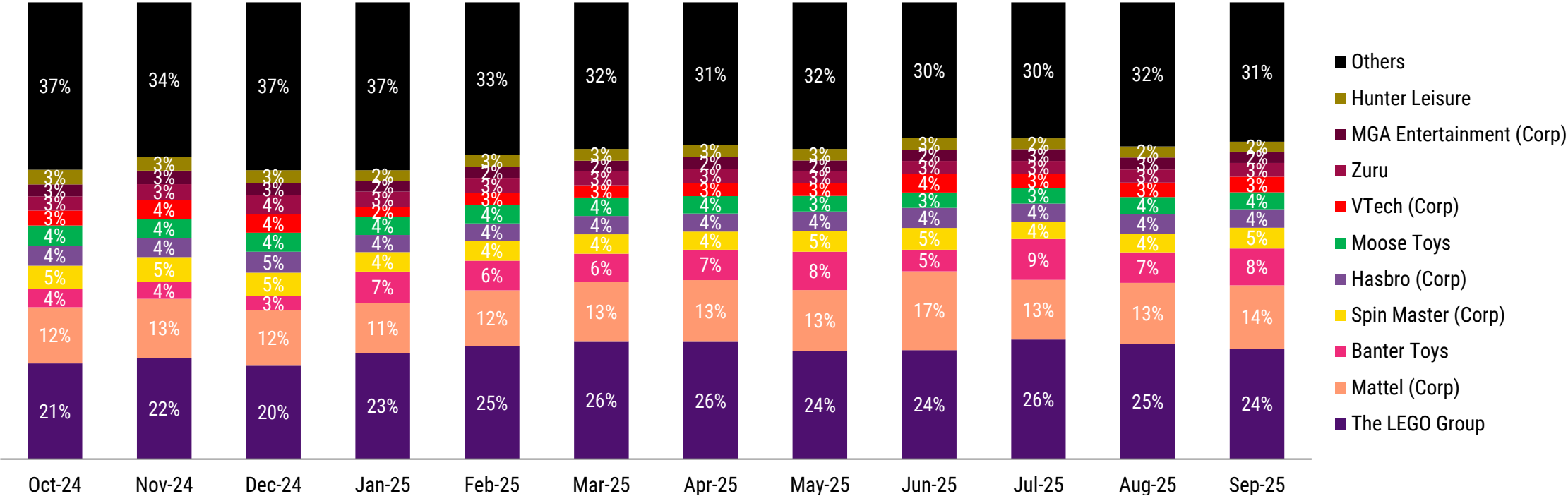
For September 2025, Building Sets (+10%) remained as the largest category followed by Games/Puzzles (+53%), Infant/Toddler/Preschool Toys (+5%), Vehicles (+8%), Outdoor Sports Toys (-2%) and Dolls (-19%). Average Price was \$18.21 and grew +7% to \$19.46 driven from both licensed and unlicensed toys.

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



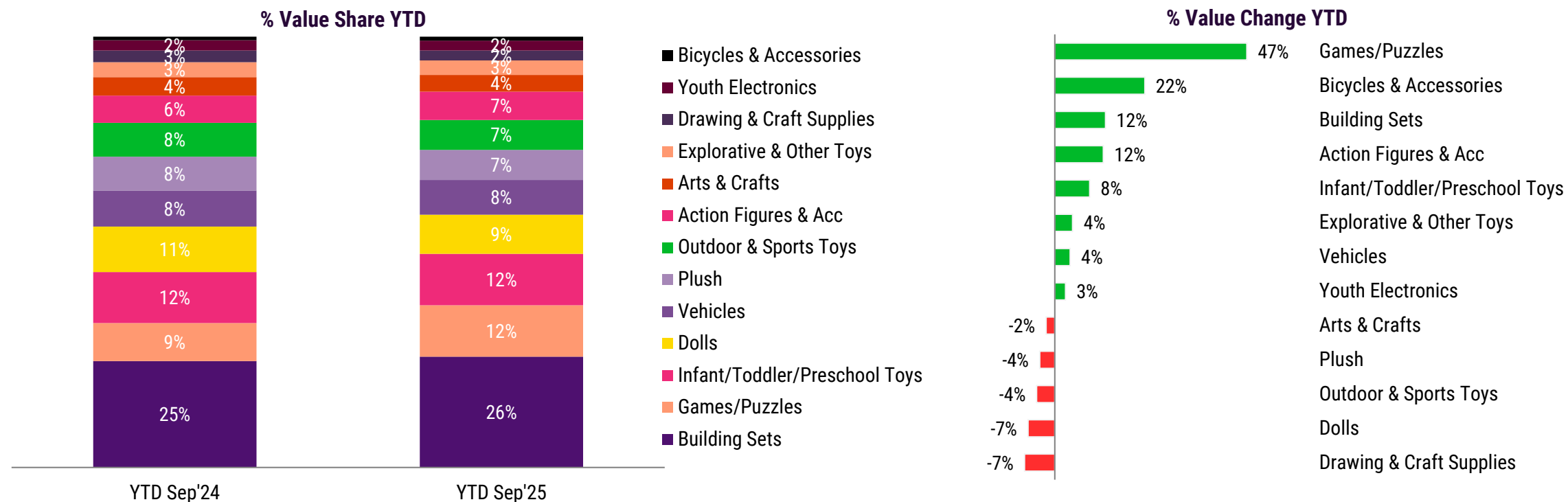
Corporate Manufacturers Trends

Pokémon, Hot Wheels and Bluey are the top 3 properties for September 2025. Banter toys was the top dollar gaining manufacturer this month followed by LEGO and Mattel. For YTD September, the top dollar gaining properties are Pokémon, Formula 1 and Minecraft and the top 3 dollar gaining manufacturers are LEGO, Banter and Mattel. Outside of the top 10 manufacturer for YTD September 2025, Jazwares, Tonies and Just Play Products continue to be the next 3 that experience growth vs. LY.



Category Trends

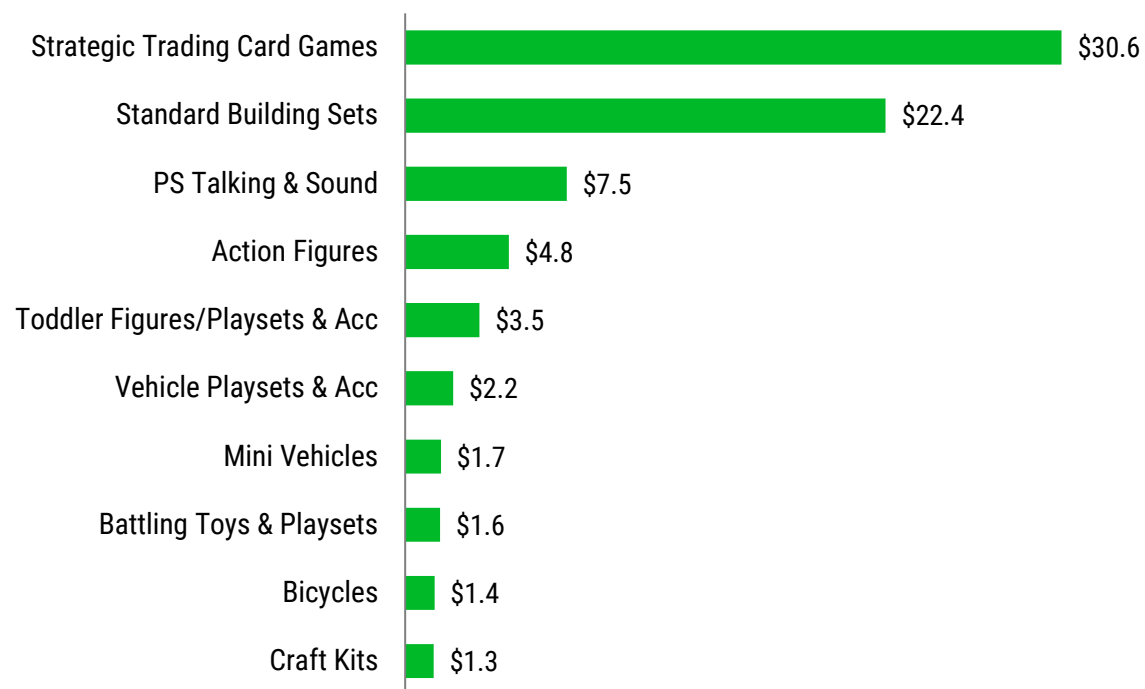
For the month of September 2025 vs. LY, 8 categories grew, Games/Puzzles (+53%) driven from Pokémon, Building Sets (+10%) driven from Formula 1, LEGO Minecraft and Fortnite, Vehicles (+8%) driven from Hot Wheels and Formula 1, Infant/Toddler/Preschool Toys (+5%) driven from Fisher-Price, Bluey and VTech Baby, Youth Electronics (+20%) driven from Pets Alive and Jurassic Park/World. Action Figures (+5%) driven from Jurassic Park/World, Beyblade and WWE, Bicycles (+26%) and Explorative & Other toys (+3%) driven from Miniverse.



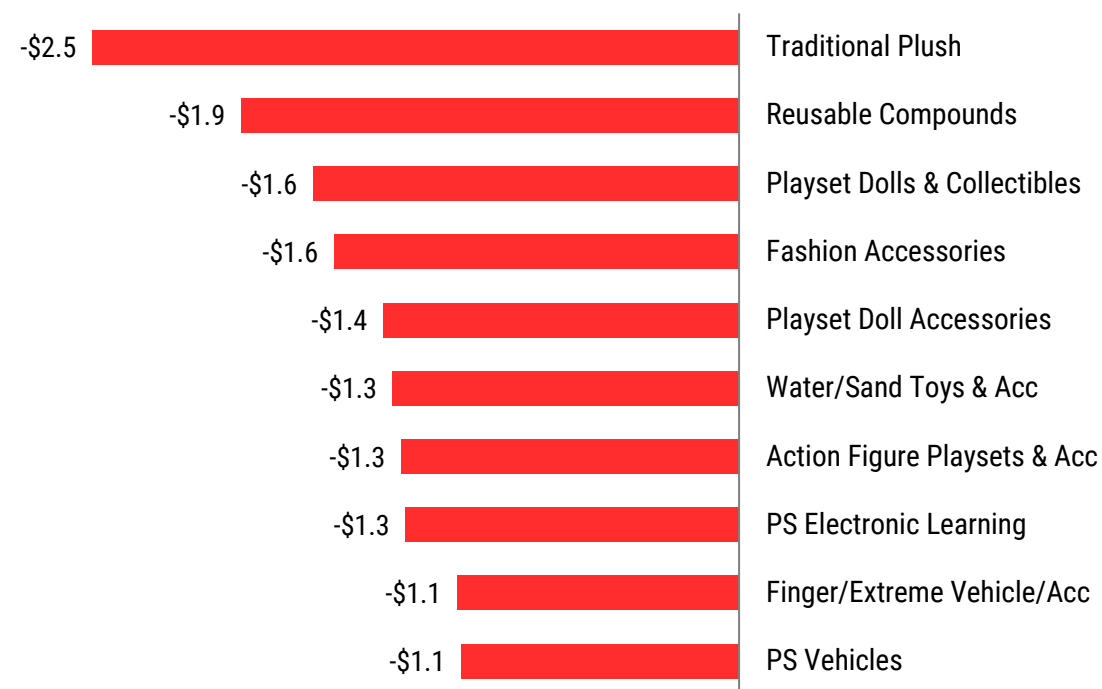
Subclass Trends

The top 3 subclass gainers for this month were Strategic Trading Card Games (>100%) driven from Pokémon, Standard Building Sets (+11%) driven from Formula 1, LEGO Minecraft and Fortnite and Toddler Figures/Playsets (+61%) driven from Fisher-Price, Vtech Baby and Bluey.

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



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



Property Trends

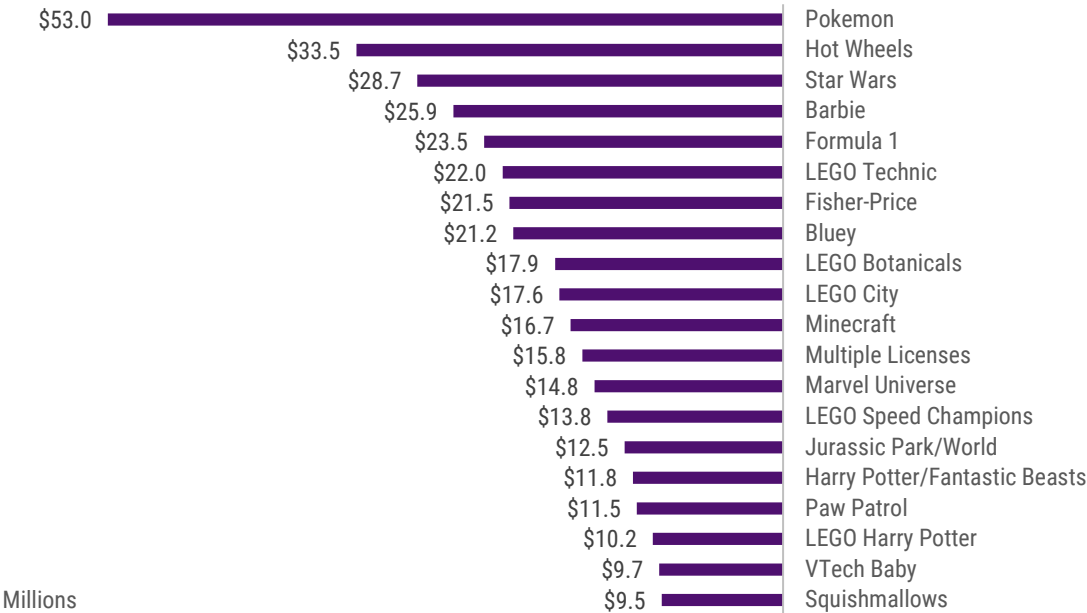
Top 5 Dollar Properties September '25

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

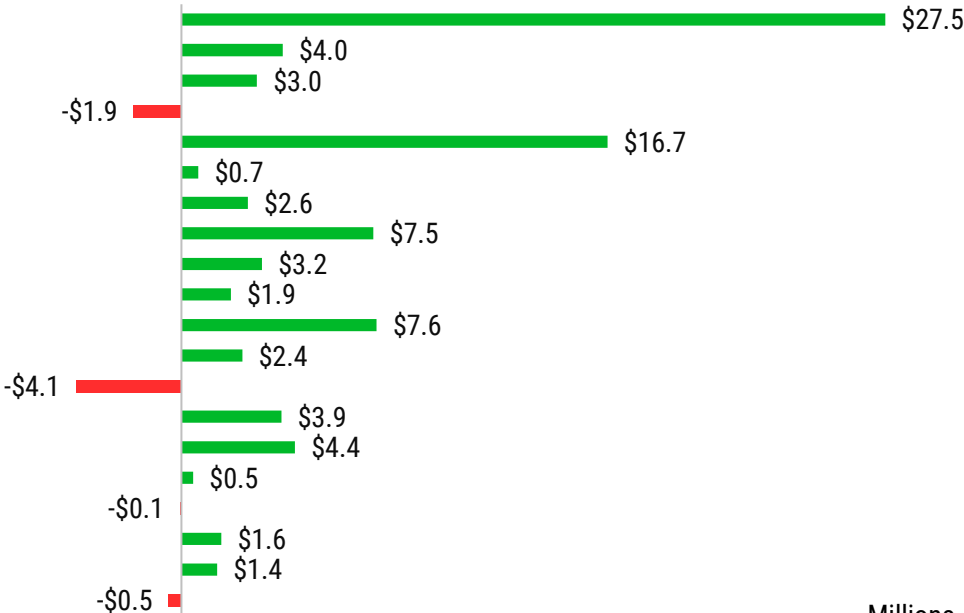
Top 5 Dollar Gaining Properties September '25 vs. september '24

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

Top 20 Properties YTD



\$ Value Change vs YAG



For more information

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