

# ATA Report

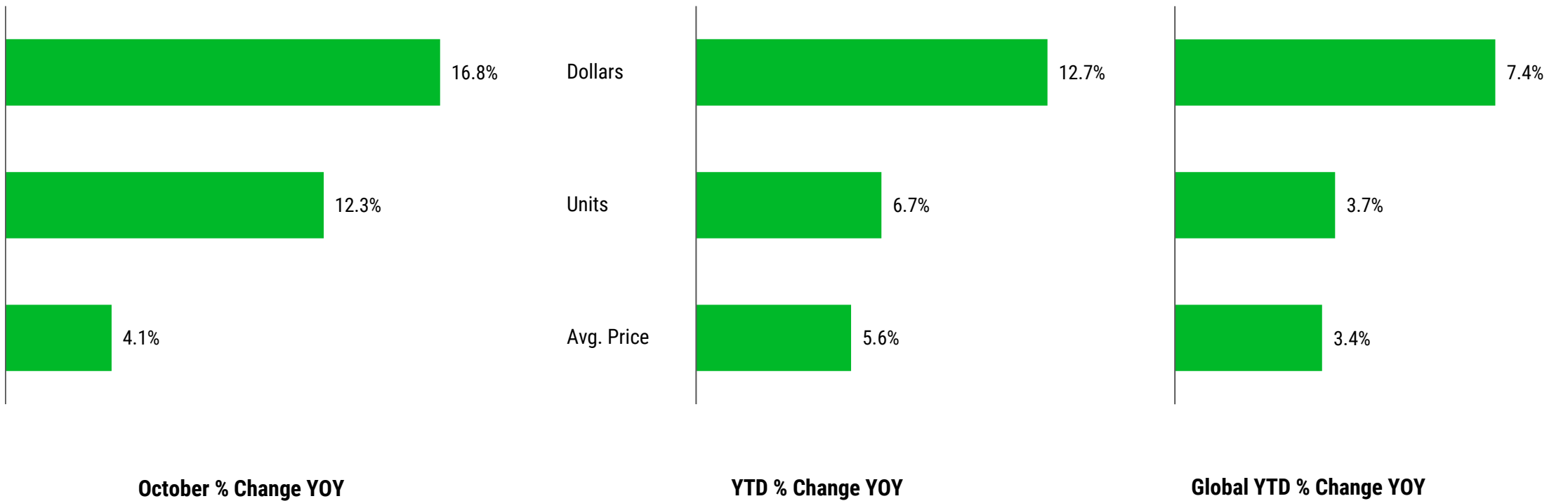
Oct 2025

Australia Toy Association



# Industry Trends

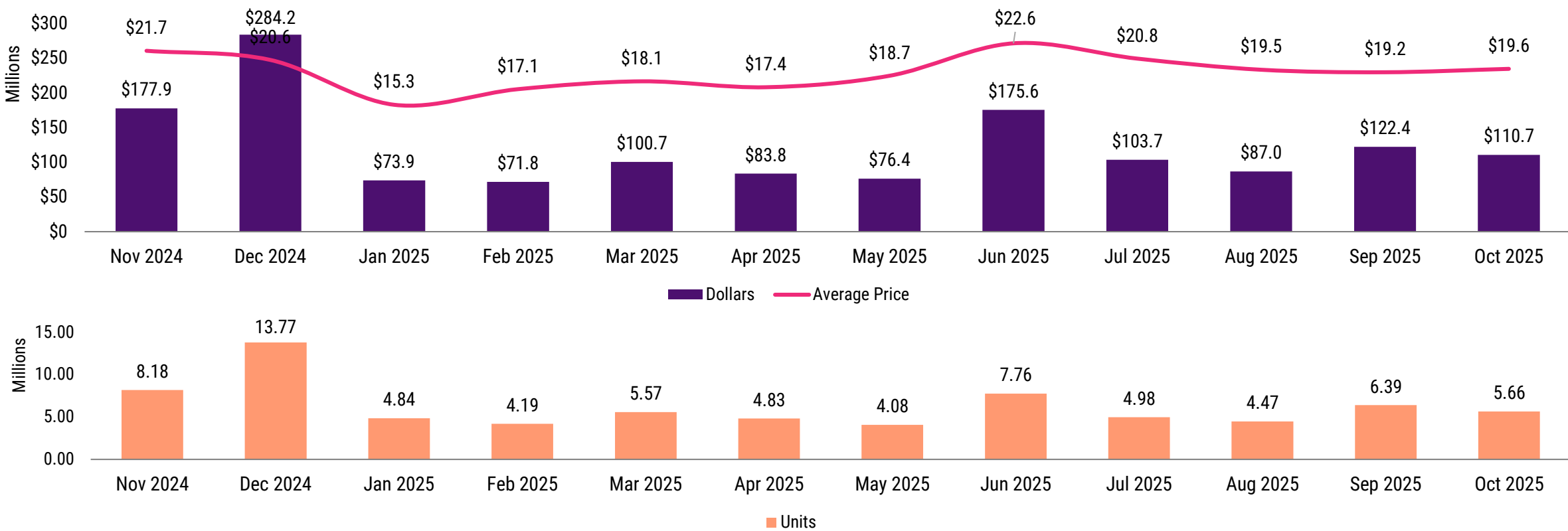
Toy dollars sales continued to grow strongly in October and for the YTD, Australia performed better than global. For the YTD, all categories grew in dollar sales except for Dolls (-3% for the YTD) and Plush. Top 5 dollar gainers for the YTD: Games/Puzzles (+49%) was the top dollar gainer followed by Building Sets (+14%), Infant Toddler Preschool (+15%), Action Figures (+13%), Vehicles (+9%).



# Monthly Trend

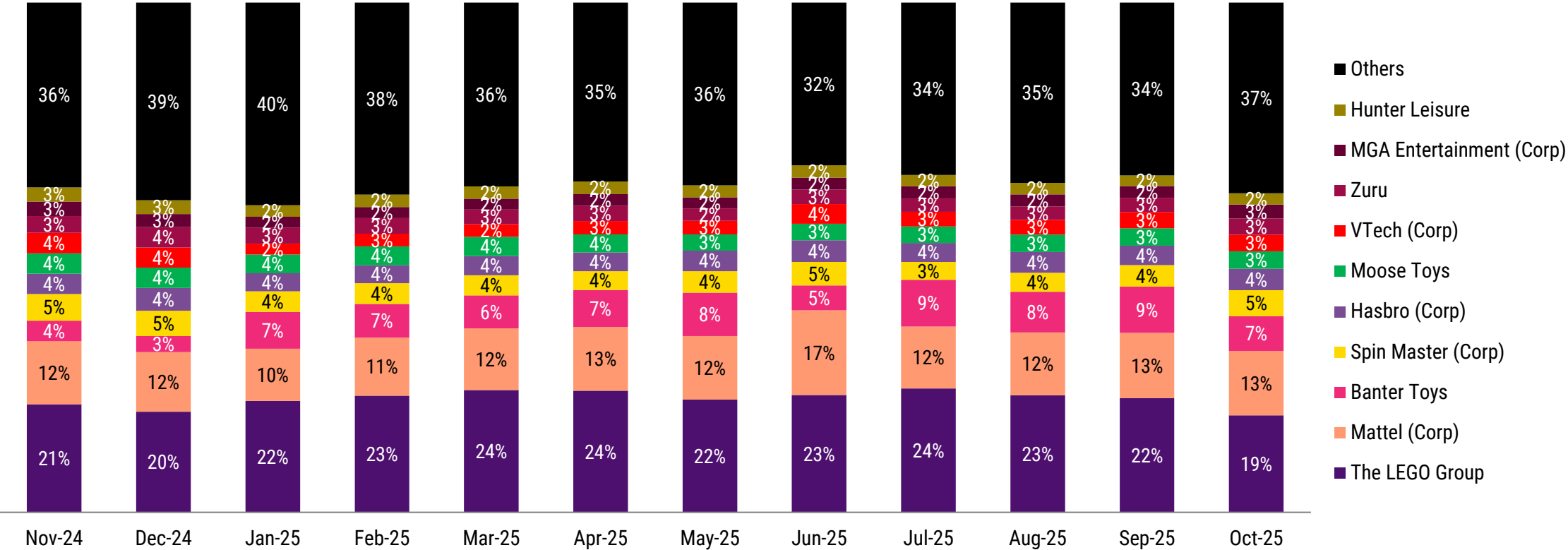
October monthly trend mirror the overall YTD trend as Games/Puzzles and Building Sets continued to add the most dollars. Licensed toys grew 23% in October, ahead of the total market. Licensed toys account for 39% of overall toy dollars

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



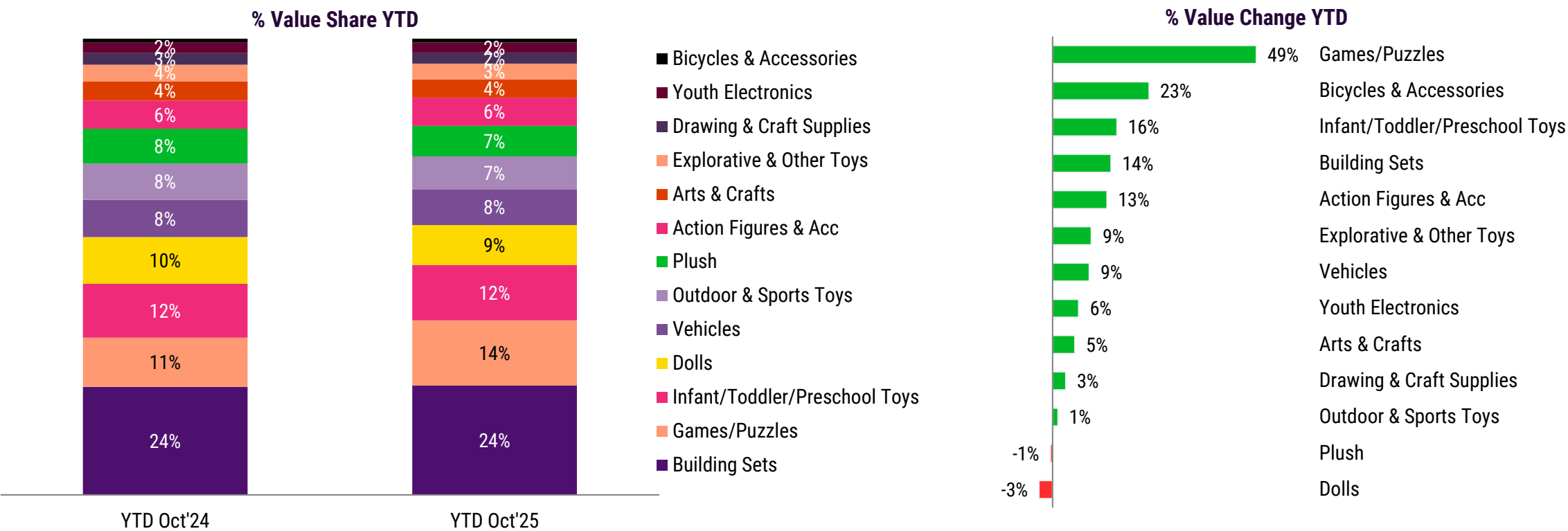
# Corporate Manufacturers Trends

Compared to the same month a year ago, Banter Toys, LEGO and Mattel were the top 3 dollar gaining corporate manufacturers. These 3 manufacturers were also the top dollar adding for the YTD. Tonies and Jellycat also had a strong YTD dollar growth. Pokémon, Hot Wheels and Bluey were the top 3 properties for October. Pokémon continues to dominate 2025 being the number 1 property every month so far



# Category Trends

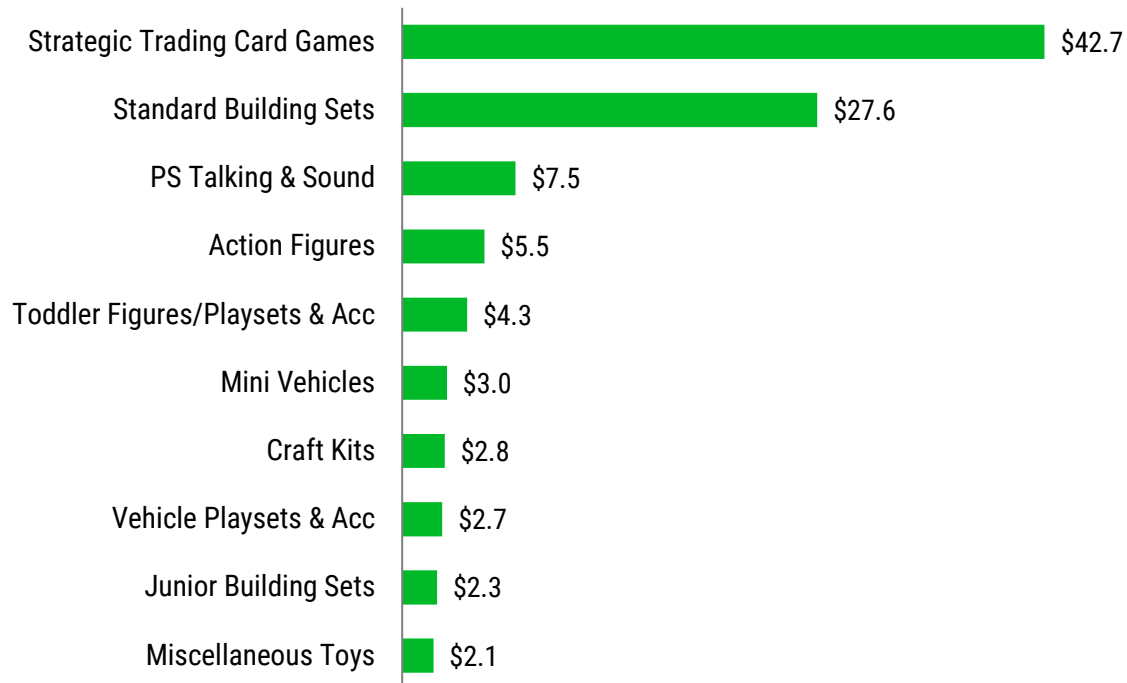
Games/Puzzles was the top growth supercategory and accounted for 41% of dollar growth for the YTD. Excluding Strategic Trading Cards from Games/Puzzles, the overall supercategory was still in growth was more moderated (+8%). As a standalone subclass, Strategic Trading Cards is now the second largest just after Standard Building Sets (ex. Juniors). Despite a slight decline Traditional Plush was still the third largest subclass. Although Dolls was in decline, Fashion Dolls still recorded slight growth +2% across several properties such as Wednesday and Wicked



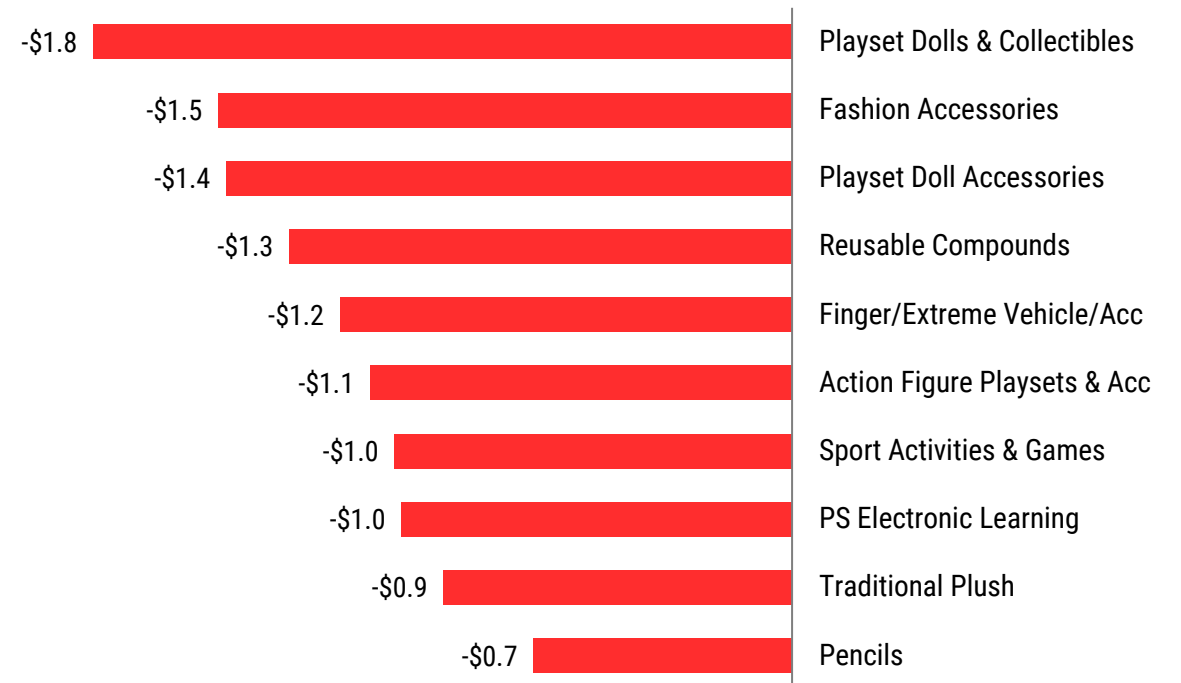
# Subclass Trends

Growth from Strategic Trading Cards were mainly coming from Pokémon, but other properties within this subclass also recorded growth such as Magic The Gathering and One Piece. Action Figures made a comeback in 2025 – the top 3 dollar adding properties were Jurassic World, WWE and Minecraft

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



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



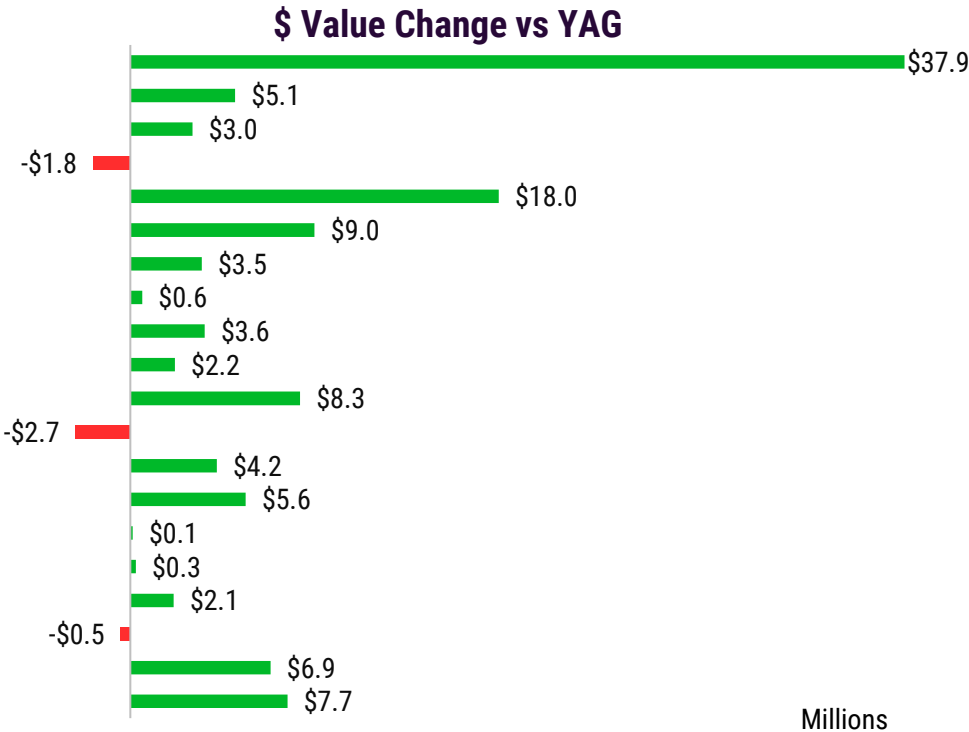
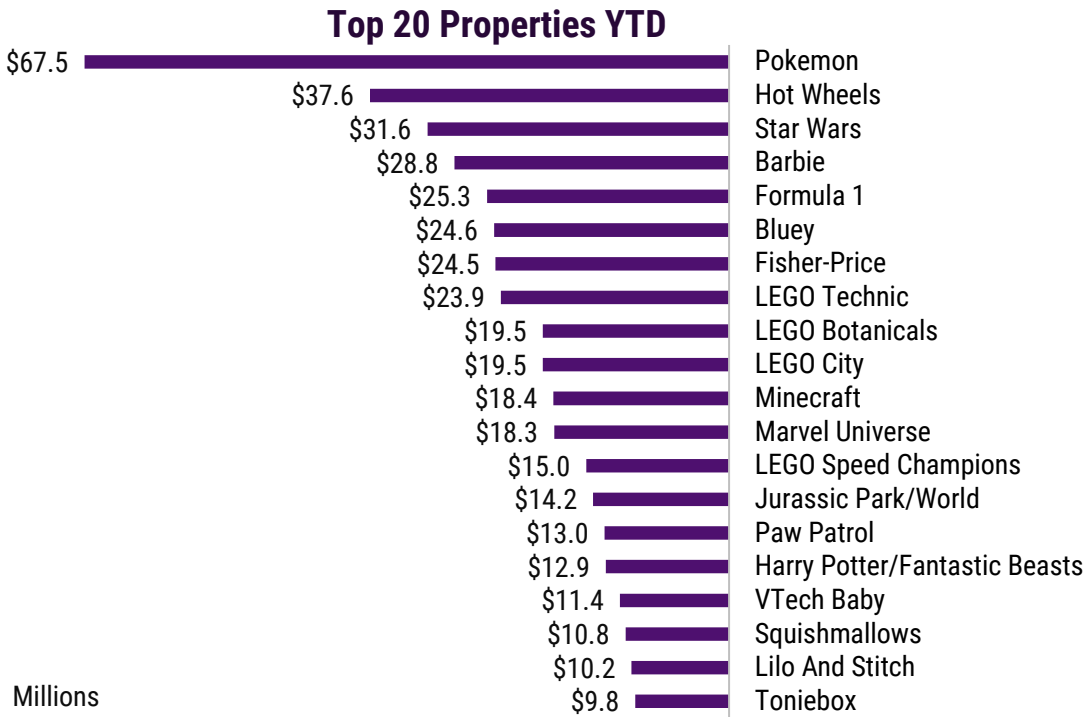
# Property Trends

## Top 5 Properties October 2025

- #1 Pokemon
- #2 Hot Wheels
- #3 Bluey
- #4 Fisher Price
- #5 Barbie

## Top 5 Dollar Gaining Properties October 2025 vs October 2024

- #1 Pokemon
- #2 Bluey
- #3 Formula 1
- #4 Hot Wheels
- #5 Jurassic World



## For more information

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