

# Whatnot 2026 Trend Report

## Complete Analysis: Fashion, Toys, Food & Drink, Beauty, and Sports Cards

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### 2026 Women's Fashion Trend Report

#### Five Cities, Five Stories: How Local Style Shaped the Year

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##### **Chicago**

**The Windy City embraced a paradox: comfort met edge as Y2K nostalgia collided with cozy pragmatism**

###### **1. Y2K revival storms the Midwest**

Low-rise jeans, butterfly motifs, and early-2000s silhouettes surged **+533% YoY**, claiming **+0.95 pp** of Chicago's fashion share. The nostalgia wave that started on TikTok found fertile ground in a city young enough to remember—and old enough to appreciate the irony.

###### **2. Plus-size fashion breaks through**

Inclusive sizing jumped **+317% YoY** and added **+0.38 pp** to market share. Brands like Torrid, Eloquii, and BloomChic resonated as Chicago shoppers demanded fashion that fits their lives—not the other way around.

###### **3. Athleisure brands become daily uniforms**

Lululemon, Halara, and performance labels climbed **+230% YoY (+0.71 pp)**, with Halara specifically up **+274%**. Cold weather and hybrid work made technical fabrics and stretch waistbands non-negotiable.

###### **4. Loungewear exits the house**

Cozy sets, elevated pajamas, and lounge-to-street pieces grew **+398% YoY (+0.22 pp)**. What started as pandemic survival gear evolved into a Chicago staple—warm enough for lake-effect wind, polished enough for brunch.

###### **5. Coastal dreams stay dormant**

Resort wear and linen barely budged in share (**+0.03 pp**), reminding us that Chicago's fashion pulse beats to a different rhythm—one shaped by snow boots, not sandals.

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##### **Phoenix**

**Desert heat drove fabric choices and wardrobe logic: breathable, versatile, and unapologetically comfortable**

###### **1. Lululemon dominates the desert**

Phoenix showed the strongest Lululemon growth of any city: **+246% YoY**, adding **+0.77 pp** to share. When it's 110°F, moisture-wicking technical fabrics aren't a luxury—they're survival.

###### **2. Plus-size options explode**

Inclusive sizing skyrocketed **+630% YoY (+0.92 pp)**—the highest growth rate across all five cities. Phoenix shoppers demanded brands that recognize bodies aren't one-size-fits-all, especially in a climate that punishes restrictive clothing.

###### **3. Linen and resort wear gain traction**

Resort-inspired pieces grew **+167% YoY**, with linen specifically up **+343% (+0.06 pp)**. Phoenix fashion mirrors its geography: vacation-ready silhouettes aren't seasonal—they're essential.

###### **4. Free People finds its people**

Boho-chic aesthetics surged **+221% YoY (+0.32 pp)**, as flowy dresses, breezy separates, and earthy tones aligned perfectly with desert living and Southwestern sensibilities.

###### **5. Y2K makes a warm-weather entrance**

Early-2000s trends climbed **+317% YoY (+0.35 pp)**. Cargo pants and low-rise cuts adapted to Phoenix's heat, proving nostalgia transcends climate zones.

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##### **Atlanta**

## **The South's cultural capital leaned into cozy maximalism while keeping athleisure as its foundation**

### **1. Cozycore takes the lead**

Knits, fleece, and sweaters surged **+398% YoY (+0.45 pp)**—a reflection of Atlanta's fall and winter months where layering reigns. Gift-giving culture and show cycles fueled this soft, tactile shift.

### **2. Lululemon becomes the everyday uniform**

Performance brands grew **+316% YoY (+0.51 pp)**, with Lululemon leading the charge. Atlanta's fitness culture and car-centric lifestyle made versatile athleisure the logical wardrobe backbone.

### **3. Plus-size fashion sees explosive growth**

Inclusive sizing exploded **+1,565% YoY (+1.02 pp)**—starting from a smaller base but signaling a major market correction. Atlanta shoppers are demanding representation, and sellers are finally responding.

### **4. Designer brands steady the ship**

Free People, Aritzia, and contemporary labels maintained consistent share as Atlanta's fashion-forward community sought elevated casual pieces that work for brunch, work, and evening plans.

### **5. Vintage cools but doesn't collapse**

Retro styles grew **+69% YoY** but lost share (**-1.27 pp**) as shoppers pivoted toward new pieces. The thrill of the hunt remained, but the urgency shifted elsewhere.

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## **Dallas**

### **Big Texas energy showed up in the data: Western touches met luxury aspirations, all wrapped in serious plus-size momentum**

#### **1. Plus-size fashion leads every category**

Inclusive sizing skyrocketed **+1,149% YoY**, adding a full **+1.04 pp** to Dallas's fashion mix. This wasn't a trend—it was a tectonic shift, proving Dallas shoppers refuse to be ignored by mainstream fashion.

#### **2. Western details stay selective**

Cowboy boots, fringe, and yokes grew **+142% YoY** but lost slight share (**-0.11 pp**). Dallas embraced cowboy-core as an accent, not a costume—a Stetson with jeans, not a full rodeo outfit.

#### **3. Free People and contemporary brands surge**

Boho-luxe labels jumped **+290% YoY (+0.22 pp)**, as Dallas's fashion identity evolved beyond stereotypes. Flowing dresses, eclectic prints, and artisan details found eager audiences.

#### **4. Athleisure grows on a big base**

Lululemon and performance brands climbed **+267% YoY (+0.26 pp)**. Dallas may love its boots, but it loves its leggings just as much—especially when running errands in a sprawling metro.

#### **5. Y2K nostalgia finds a Texas home**

Early-2000s styles rose **+318% YoY (+0.20 pp)**. Low-rise denim, cargo pants, and butterfly clips proved that nostalgia sells—even in cities known for cowboy hats.

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## **Miami**

### **Magic City brought the heat—and the hype—with Skims, streetwear, and resort vibes year-round**

#### **1. Skims becomes Miami's signature**

The brand exploded **+228% YoY**, adding **+0.90 pp**—the biggest share gainer of any single brand in any city. Skims' sculpting fits, neutral palettes, and Instagram-ready aesthetic became Miami's unofficial uniform.

#### **2. Streetwear and Y2K collide**

Nike Dunks, Jordans, and retro streetwear jumped **+369% YoY (+0.55 pp)**, while Y2K styles surged **+355% (+0.48 pp)**. Miami's fashion is unapologetically bold, blending hype drops with nostalgic edge.

#### **3. Coastal and resort wear stay core**

Linen, resort pieces, and vacation-ready silhouettes grew **+275% YoY (+0.55 pp)**. In Miami, "resort wear" isn't aspirational—it's functional. The climate demands breathable, light fabrics every single day.

#### **4. Plus-size options finally arrive**

Inclusive sizing climbed **+428% YoY (+0.27 pp)**, reflecting a long-overdue correction. Miami's diverse population is seeing itself represented in fashion—and responding with their wallets.

#### **5. Lululemon loses ground to heat-friendly alternatives**

Despite growing **+105% YoY**, Lululemon lost share (**-0.95 pp**) as Miami shoppers gravitated toward lighter-weight alternatives like Halara (**+252% YoY, +0.24 pp**) and resort brands better suited to perpetual summer.

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### **What It All Means**

Fashion in 2025 wasn't about a single trend—it was about identity. Chicago leaned into nostalgia and pragmatism. Phoenix prioritized function and comfort. Atlanta embraced cozy maximalism. Dallas demanded inclusivity with a Western edge. Miami stayed hot, hyped, and vacation-ready.

But the through line? **Plus-size fashion**. Across every city, inclusive sizing saw triple- or quadruple-digit growth, claiming meaningful share from legacy categories. The message is clear: fashion isn't one-size-fits-all anymore. Sellers who recognize this—and stock accordingly—are winning.

The second unifying force? **Athleisure isn't a trend anymore—it's infrastructure**. From Phoenix's desert runs to Chicago's cold commutes, performance fabrics became the baseline. Lululemon, Halara, and Hoka aren't just brands—they're wardrobe essentials.

And finally, **nostalgia sells**. Y2K aesthetics surged in every city, reminding us that fashion is cyclical. What's old becomes new again—especially when the target demo is young enough to mine their childhoods for content and old enough to afford the real versions this time around.

The future of live shopping? It's local. It's specific. And it's already here.

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## **TOYS & COLLECTIBLES**

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### **2026 Toy Collectibles Trend Report**

#### **Five Cities, Five Obsessions: Popmart's Takeover and What Comes Next**

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##### **The Big Picture: Popmart Conquers America**

While 2024 belonged to sneaker culture and trading cards, 2025 saw a seismic shift: **Popmart's blind box ecosystem claimed 14-24% of the toy market across all five cities**. Labubu led the charge, but the real story is how an entire collecting culture—blind boxes, designer toys, kawaii aesthetics—went from niche to mainstream in 12 months.

**Miami led the Labubu wave** at 11.7% of all toy orders, followed closely by Atlanta (11.2%) and Chicago (10.3%). But every city saw triple-digit percentage point growth, with some markets exploding from near-zero to dominant in a single year.

The question now: **What's the next Labubu?** Our data points to Sonny Angel, Jellycat, and the broader "blind box culture" as the forces reshaping toy collecting in 2026.

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### **Chicago**

#### **The Midwest became the epicenter of blind box culture, with mystery unboxing driving nearly 1 in 5 toy purchases**

##### **1. Popmart ecosystem claims nearly 1 in 5 toys**

Labubu, Crybaby, Dimoo, and explicit Popmart mentions combined for **orders (18.9% of Chicago toys)**.

Labubu alone surged **+81,518% YoY**, claiming **+10.3 pp** of market share. The Popmart takeover wasn't subtle—it was absolute.

## **2. Blind box culture becomes infrastructure**

Mystery boxes, surprise unboxings, and blind pulls jumped **+663% YoY (+5.5 pp)**, reaching **8.5% of all toy orders**. Chicago embraced the gamification of collecting—where the thrill of the unknown became as valuable as the collectible itself.

## **3. Sonny Angel finds its American home**

The Japanese cherub collective exploded **+7,375% YoY (+0.66 pp)**, with orders. Chicago's appetite for kawaii aesthetics positioned it as Sonny Angel's strongest U.S. market by share.

## **4. Plush collectibles surge beyond Labubu**

General plush sales (beyond branded collectibles) jumped **+1,638% YoY (+2.4 pp)**. Smiskis, Care Bears, and unbranded kawaii plush found buyers hungry for soft, Instagram-ready collectibles.

## **5. LEGO and Barbie lose ground**

Despite growing in absolute numbers, LEGO fell **-1.2 pp** and Barbie dropped **-1.1 pp** as collectors pivoted toward blind box ecosystems. The shift from building and playing to unboxing and displaying is real.

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## **Phoenix**

### **Desert heat fueled the Popmart surge, with Bearbrick and action figures holding strong alongside blind box dominance**

#### **1. Popmart claims 17% of the toy market**

The ecosystem (Labubu, explicit Popmart, Crybaby, Dimoo) reached **orders (17.1%)**. Labubu alone grew **+129,340% YoY (+8.8 pp)**, transforming from invisible to ubiquitous in 12 months.

#### **2. Blind box culture explodes**

Mystery boxes surged **+1,076% YoY (+5.9 pp)**, reaching **7.5% of toy sales**. Phoenix collectors embraced the surprise element, turning toy shopping into a game show.

#### **3. Bearbrick leads designer toy momentum**

Bearbrick doubled **+100% YoY**, claiming **0.9% of toys**—the highest share of any city. Phoenix's streetwear-adjacent collecting culture made high-end designer toys a natural fit.

#### **4. LEGO rebounds**

Unlike other cities, Phoenix saw LEGO gain share (**+0.8 pp, +221% YoY**), suggesting a bifurcated market: blind box collectors and traditional builders coexist without cannibalizing each other.

#### **5. Die-cast and Hot Wheels collapse**

Die-cast vehicles fell **-3.3 pp** despite growing in absolute numbers, while Hot Wheels dropped **-0.7 pp**. The narrative shifted from miniature cars to miniature art toys.

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## **Atlanta**

### **The South's toy hub went all-in on blind box culture, with Popmart claiming nearly 1 in orders**

#### **1. Popmart dominates at 23.6% of toys**

The ecosystem reached **orders (23.6%)**—the highest share of any city. Labubu appeared seemingly overnight at **11.2% of all toys** (up from 0% in 2024), while explicit Popmart mentions hit **11.4%**.

#### **2. Blind box culture was already established**

Atlanta entered 2025 with a strong blind box base (orders in 2024), growing **+105% YoY** to reach **13.7% of toys**. The city didn't just adopt Popmart—it was primed for it.

#### **3. Plush collectibles explode**

General plush surged **+3,500% YoY (+2.9 pp)**, driven by kawaii aesthetics and the Instagram-friendly appeal of soft toys. Atlanta's younger collector base embraced "cuteness culture" wholesale.

#### **4. Funko holds its ground**

Unlike other cities, Funko gained share (**+1.1 pp, +165% YoY**), suggesting Atlanta's pop culture fandom runs deep enough to sustain multiple collectible ecosystems.

#### **5. Traditional toys retreat**

Barbie fell **-0.6 pp** (-41% YoY), LEGO dropped **-0.9 pp**, and die-cast vehicles lost **-1.9 pp**. Atlanta's shift

toward adult collectibles is unmistakable.

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## Dallas

**Texas embraced Popmart selectively, with Jellycat emerging as the dark horse contender for "next big thing"**

### 1. Popmart captures 14.8% of toys

The ecosystem reached **orders (14.8%)**, with Labubu claiming **7.6% (+7.6 pp)**. Growth was explosive (**+91,200% YoY**), but Dallas remained the most selective Popmart market by share.

### 2. Jellycat surges as the British invasion begins

The British plush brand exploded **+4,133% YoY**, claiming **0.21% of toys**—the highest share of any city. With orders in 2025 (vs. 3 in 2024), Dallas signaled early adoption of what could be the next kawaii collectible wave.

### 3. Plush diversity thrives

General plush jumped **+1,459% YoY (+1.5 pp)**, with Dallas collectors gravitating toward **Sanrio (+1,591% YoY, +0.6 pp)** and Care Bears alongside Popmart. The market is more fragmented—and more interesting—than Chicago's Labubu monoculture.

### 4. Action figures and LEGO hold share

Action figures gained **+1.0 pp** (+235% YoY), while LEGO added **+0.4 pp**, suggesting Dallas collectors maintain broader interests beyond blind box hype.

### 5. Blind boxes lose share despite growth

Mystery boxes fell **-2.5 pp** despite growing **+77% YoY**, as Labubu-specific purchases cannibalized generic blind box demand. Dallas buyers know what they want.

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## Miami

**Magic City went all-in: Labubu reached nearly 12% of toys, while Sonny Angel became a cultural marker**

### 1. Labubu dominates at 11.7% —the highest of any city

Miami claimed the #1 spot for Labubu penetration, with **orders (11.7% of toys)**. Growth was staggering: **+434,400% YoY (+11.7 pp)**. The Magic City became Labubu Central.

### 2. Sonny Angel hits critical mass

The Japanese cherub collectible reached **orders (1.13%)**—the highest share of any city. Miami's Latin and Asian cultural influences created the perfect breeding ground for kawaii aesthetics to flourish.

### 3. Blind box culture surges

Mystery boxes jumped **+786% YoY (+6.9 pp)**, reaching **10.3% of toys**. Miami embraced the unboxing ritual, turning toy shopping into social media content.

### 4. Popmart ecosystem claims 21% of toys

The full ecosystem (Labubu, Crybaby, Dimoo, explicit Popmart) reached **orders (21.1%)**—second only to Atlanta. Miami's aesthetic-driven culture made designer toys a natural fit.

### 5. Smiskis enter the scene

The Japanese glow-in-the-dark figures surged **+16,000% YoY**, claiming **0.22% of toys**. Still small, but the trajectory mirrors Labubu's 2024 baseline—watch this space.

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## What's Next: The Race for "Next Labubu"

### Sonny Angel (Current Contender #1)

- Miami: 1.13% share (orders)
- Chicago: 0.69% share (orders)
- Growth trajectory mirrors Labubu's early 2024 adoption curve
- **Why it could win:** Established in Japan, perfect for blind box format, diverse character lines, strong Instagram aesthetic

### **Jellycat (Dark Horse #2)**

- Dallas: 0.21% share (orders, +4,133% YoY)
- Chicago: 0.07% share (orders, +5,600% YoY)
- **Why it could win:** British heritage, luxury positioning (\$20-\$80 price points), gifting appeal, celebrity endorsements (already spotted on high-profile Instagram accounts)

### **Smiskis (Underground #3)**

- Miami: 0.22% share (orders, +16,000% YoY)
- Chicago: 0.17% share (orders, +1,522% YoY)
- **Why it could win:** Glow-in-the-dark novelty, blind box format, quirky aesthetic appeals to millennial/Gen Z collectors tired of "cute"

### **Crybaby (Popmart's Second Act)**

- Phoenix: 0.52% share (orders)
  - Atlanta: 0.63% share (orders)
  - **Why it's interesting:** Already part of Popmart ecosystem, different aesthetic (edgy vs. cute), could capture collectors seeking Labubu alternatives
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## **The Blind Box Era: Implications for 2026**

### **1. The gamification of collecting is complete**

Blind boxes, mystery pulls, and surprise unboxings aren't a trend—they're the new collecting infrastructure.

Cities that embraced this format (Miami, Atlanta, Chicago) saw Popmart capture 19-24% of toys.

### **2. Kawaii aesthetics have crossed over**

What started in Asia (Sonny Angel, Labubu, Smiskis) is now mainstream in U.S. metros. "Cute" is no longer niche—it's a \$100M+ category on Whatnot alone.

### **3. Traditional toys are losing cultural relevance**

LEGO, Barbie, Hot Wheels, and die-cast vehicles lost share in nearly every city. The shift from building/playing to unboxing/displaying represents a fundamental change in what "collecting" means.

### **4. Instagram drives demand**

Every major growth category (Labubu, Sonny Angel, Bearbrick, Smiskis) is inherently photogenic. Collectibles that don't photograph well are dying. Collectibles that create shareable moments are thriving.

### **5. The next breakout will be fast**

Labubu went from 2-orders per city in 2024 to 1,700-orders in 2025. Sonny Angel and Jellycat are showing similar early signals. The collectibles market has learned to move at TikTok speed.

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## **Bottom Line**

**Miami** is the trendsetting market—highest Labubu penetration, strongest Sonny Angel adoption, earliest Smiskis signals.

**Atlanta** is the most all-in—highest Popmart ecosystem share (23.6%), suggesting the deepest blind box culture.

**Dallas** is the thoughtful adopter—selective Popmart uptake but earliest Jellycat growth, indicating more diverse collecting tastes.

**Chicago** is the volume leader—most Labubu orders in absolute terms, strongest Sonny Angel presence, massive blind box infrastructure.

**Phoenix** is the streetwear crossover—Bearbrick dominance signals that desert collectors blend designer toys with sneaker culture.

The race for "next Labubu" is on. Smart sellers are watching Sonny Angel, Jellycat, and Smiskis. But the real insight? **The format matters more than the IP.** Blind boxes, kawaii aesthetics, and Instagram-friendly unboxing rituals are the infrastructure. The specific character is just the payload.

Welcome to the Popmart era. It's only just begun.

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## FOOD & DRINK

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### 2026 Food & Drink Trend Report

#### Five Cities, One Obsession: How Candy Conquered Whatnot's Food Scene

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##### The Big Picture: The Great Candy Takeover

While fashion embraced inclusivity and toys went all-in on blind boxes, **food and drink became synonymous with candy** in 2025. Across all five cities, candy (gummies, chocolate, and freeze-dried varieties) surged to claim 20-33% of the food category, growing between +264% and +1,228% year-over-year.

The shift wasn't subtle: traditional food categories like snack boxes, regional specialties, and even Asian snacks collapsed in share as buyers pivoted hard toward pure confectionery. The message? **People aren't buying groceries on Whatnot—they're buying indulgence, nostalgia, and Instagram-ready treats.**

**Dallas led the candy surge** at 33% of all food orders, but every city saw double-digit percentage point gains. The category expanded so fast it cannibalized everything else, leaving gourmet jams, protein supplements, and viral brands fighting for scraps.

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#### Chicago

**The Midwest went all-in on candy, with freeze-dried innovations and emerging viral brands carving out niches**

##### 1. Candy dominates at 28.8% of food sales

Gummies, chocolate, and candy jumped **+1,141% YoY (+18.5 pp)**, with orders. Chicago's food scene simplified dramatically: if it's sweet and shareable, it sells. If it's not, it doesn't.

##### 2. Freeze-dried candy finds its footing

Freeze-dried Skittles, Starburst, and novelty candies surged **+1,038% YoY (+1.3 pp)**. The science experiment aesthetic—crunchy, airy, intensified flavor—appealed to Chicago's curiosity-driven buyers.

##### 3. Chamoy culture arrives

The Mexican candy trend (chamoy-coated fruits, gummies, and pickles) exploded **+3,800% YoY (+0.9 pp)**, starting from near-zero in 2024. Chicago embraced Latino flavor profiles, proving candy trends transcend geography.

##### 4. Dubai chocolate enters the scene

Luxury chocolate with viral TikTok appeal (typically featuring pistachio and kadayif) reached orders (**0.35% share**). Small but notable—Dubai chocolate signals interest in premium, Instagram-worthy confections.

##### 5. Regional specialties collapse

Buc-ee's products fell **-45% YoY (-2.5 pp)**, while snack boxes dropped **-2.2 pp** despite absolute growth. Chicago buyers want candy, not curated variety.

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#### Phoenix

**Desert heat drove candy cravings, but coffee and tea emerged as surprising growth categories**

##### 1. Candy claims 26.5% of food sales

Confections grew **+505% YoY (+4.3 pp)**, reaching orders. Phoenix kept candy front and center while diversifying into beverages—a unique pattern among the five cities.

##### 2. Freeze-dried Skittles lead innovation

At orders (**0.89% share**, +1,100% YoY), Phoenix showed the strongest freeze-dried Skittles adoption by share. The desert climate and novel textures created perfect conditions for experimentation.

### **3. Coffee and tea surge**

Coffee jumped **+914% YoY (+1.2 pp)**, while tea climbed **+1,075% YoY (+0.9 pp)**. Phoenix's beverage interest is unique—no other city saw this level of hot drink growth, suggesting sellers tapped into gifting or wellness trends.

### **4. Joyride candy dominates viral brands**

With orders (**0.67% share**), Phoenix led Joyride candy adoption—a sugar-free, functional candy brand positioned between indulgence and health. The wellness-conscious desert demographic responded.

### **5. Traditional freeze-dried candy loses ground**

Despite growing in absolute terms (+277% YoY), freeze-dried candy lost **-2.2 pp** in share as generic candy surged faster. Phoenix buyers want innovation, but not at the expense of classics.

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## **Atlanta**

### **The South's food hub stayed traditional, with cookies, jams, and beverages claiming share from experimental categories**

#### **1. Candy grows but stays measured at 20.1%**

Confections surged **+452% YoY (+13.2 pp)** to orders—strong growth, but Atlanta showed the lowest candy penetration of any city. Southern food preferences favored homemade and regional items.

#### **2. Cookies and baked goods surge**

Cookies jumped **+486% YoY (+2.5 pp)**, signaling Atlanta's preference for homemade, artisan, or gift-worthy baked items over mass-produced candy.

#### **3. Gourmet jams make a comeback**

Preserves, jellies, and honey grew **+700% YoY (+1.7 pp)**. Atlanta embraced Southern hospitality staples—items you'd bring to a potluck or gift to a neighbor.

#### **4. Beverages diversify**

Soda climbed **+750% YoY (+1.3 pp)**, tea grew **+280% (+0.6 pp)**, and coffee rose **+300% (+0.6 pp)**. Atlanta's food scene is broader, less candy-centric, and more gift-focused.

#### **5. Asian snacks and freeze-dried candy collapse**

Asian snacks fell **-76% YoY (-5.3 pp)**, while freeze-dried candy dropped **-13% (-4.5 pp)**. Atlanta buyers rejected novelty in favor of comfort and tradition.

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## **Dallas**

### **Big Texas energy translated to big candy appetite, with Dallas leading all cities at 33% candy penetration**

#### **1. Candy explodes to 33% of food sales**

Confections skyrocketed **+1,229% YoY (+11.3 pp)**, reaching orders. Dallas didn't just adopt candy—it *became* candy. One in three food purchases was pure confectionery.

#### **2. Freeze-dried candy surges from zero**

Freeze-dried innovations jumped from 0 to orders (**+4.2 pp**), the highest share gain of any city. Dallas embraced texture transformation and viral candy trends wholesale.

#### **3. Tea becomes a sleeper hit**

Tea appeared from nowhere to claim **1.9%** of food sales (orders), reflecting gifting culture or wellness interest. Dallas's tea surge matched Phoenix's coffee growth—unexpected but significant.

#### **4. Gourmet jams explode**

Preserves and artisan spreads surged **+2,000% YoY (+1.1 pp)**, suggesting Dallas buyers mix indulgence (candy) with gifting (jams) in equal measure.

#### **5. Nutrafol gains traction**

The hair supplement brand reached orders (**0.49% share**), the highest of any city. Dallas's interest in beauty and wellness supplements created a niche food-adjacent category.

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## **Miami**

**Magic City balanced candy dominance with luxury touches—Dubai chocolate, gourmet jams, and coffee all gained ground**

**1. Candy claims 25.9% of food sales**

Confections grew **+265% YoY (+12.0 pp)** to orders. Miami's candy adoption was strong but measured—the city maintained the most diverse food portfolio.

**2. Gourmet jams surge**

Artisan preserves jumped **+625% YoY (+2.1 pp)**, with orders. Miami's gifting culture and premium aesthetic made upscale spreads a natural fit.

**3. Dubai chocolate leads luxury confections**

At orders (**0.45% share**), Miami showed the strongest Dubai chocolate adoption by share. The city's international influence and luxury positioning made viral Middle Eastern treats resonate.

**4. Freeze-dried candy grows but stays niche**

Freeze-dried innovations climbed **+239% YoY (+1.8 pp)**, but Miami buyers preferred traditional candy formats. The freeze-dried boom seen in Dallas and Phoenix didn't fully translate.

**5. Snack boxes collapse**

Mystery snack bundles fell **-71% YoY (-7.0 pp)**, the steepest decline of any category in any city. Miami buyers want curation, but they want to choose—not receive random assortments.

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## The Emerging Trends: What's Breaking Through?

### Dubai Chocolate (The Luxury Play)

- Miami: 0.45% share (orders)
- Chicago: 0.35% share (orders)
- **Why it matters:** TikTok-viral Middle Eastern chocolate featuring pistachio cream and kadayif (shredded phyllo) hit U.S. markets hard. At \$10-\$20 per bar, it's positioned as accessible luxury—Instagram-worthy, gift-ready, and culturally novel.

### Freeze-Dried Candy (The Texture Revolution)

- Phoenix: 0.89% share (freeze-dried Skittles specifically)
- Dallas: 4.17% share (all freeze-dried candy)
- **Why it matters:** Freeze-drying transforms texture while intensifying flavor. It's science meets nostalgia—familiar candies made novel. Dallas and Phoenix led adoption, but every city showed interest.

### Joyride Candy (The Wellness Crossover)

- Phoenix: 0.67% share (orders)
- Chicago: 0.45% share (orders)
- **Why it matters:** Sugar-free, vitamin-infused, functional candy positions itself between indulgence and health. It's candy you can justify, perfect for wellness-conscious Gen Z and millennials.

### Chamoy Culture (The Flavor Explosion)

- Chicago: +3,800% YoY (0.9 pp)
- Phoenix: +1,233% YoY (0.9 pp)
- **Why it matters:** Mexican candy trends—chamoy-coated fruits, gummies, pickles, and spicy-sweet combinations—crossed over from Latino markets to mainstream appeal. Flavor intensity and cultural authenticity drive demand.

### Nutrafol (The Beauty Supplement)

- Dallas: 0.49% share (orders)
  - **Why it matters:** A \$176 hair supplement showing up in food and drink signals category blurring. Wellness, beauty, and food converge as buyers seek functional products beyond pure nutrition.
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## **What Died: The Categories That Couldn't Compete**

### **Snack Boxes / Mystery Bundles**

Lost share in every single city, with Miami's **-7.0 pp** collapse leading the retreat. Buyers want intentional purchases, not random assortments.

### **Asian Snacks**

Fell in Chicago, Atlanta, Dallas, and Miami. The early-2024 Asian candy boom (Hi-Chew, Pocky, mochi) faded as American candy nostalgia won out.

### **Regional Specialties**

Buc-ee's, Trader Joe's, and regional products lost ground everywhere. Buyers want universal candy, not geographically specific items that require explanation.

### **Soda and Energy Drinks**

Lost share in Phoenix and Miami as candy's dominance squeezed beverage categories. Even traditional drinks couldn't compete with confectionery's gravity.

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## **The Candy Era: What It Means for 2026**

### **1. Food and drink = candy + novelty**

Buyers aren't treating Whatnot's food category as a grocery platform. They're buying treats, gifts, and Instagram moments. Anything practical or nutritious is struggling.

### **2. Texture innovation matters**

Freeze-dried candy proved that familiar flavors in novel formats sell. The science experiment appeal—crunchy Skittles, airy gummies—creates purchase justification beyond taste.

### **3. Luxury confections are viable**

Dubai chocolate's emergence at \$10-\$20 per bar shows buyers will pay premium prices for culturally interesting, visually stunning candy. Accessible luxury works.

### **4. Wellness-candy hybrids have room**

Joyride's functional candy and Nutrafol's beauty supplement presence suggest buyers want indulgence with benefits. Candy that solves problems (vitamin infusion, hair health, sugar-free) has legs.

### **5. Cultural flavors cross over**

Chamoy's explosion proves Mexican candy culture resonates beyond Latino markets. Spicy-sweet, intensely flavored, culturally authentic treats appeal broadly.

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## **Bottom Line**

**Dallas** is the candy capital—33% of food is pure confectionery, the highest penetration.

**Chicago** is the innovation lab—freeze-dried candy, chamoy culture, and Dubai chocolate all found early traction.

**Phoenix** is the beverage outlier—coffee and tea surged alongside candy, creating a more balanced portfolio.

**Atlanta** is the traditionalist—cookies, jams, and beverages held ground against candy's dominance.

**Miami** is the luxury market—Dubai chocolate, gourmet jams, and premium confections thrived alongside mainstream candy.

The race for "next viral food" is on. Smart sellers are watching Dubai chocolate (luxury), freeze-dried innovations (texture), Joyride candy (wellness), and chamoy culture (flavor intensity). But the overarching truth?

**Candy won. Everything else is fighting for second place.**

Welcome to the sweetest year on Whatnot.

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## BEAUTY

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### 2026 Beauty Trend Report

#### Five Cities, One Revelation: Fragrance Dethroned Makeup as Beauty's New King

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##### The Big Picture: The Fragrance Revolution

2025 wasn't just another year in beauty—it was a **paradigm shift**. Across all five cities, fragrance grew 2,100-3,800% year-over-year, claiming 10-13% of the beauty category and decisively overtaking makeup in share. Meanwhile, makeup—once beauty's unquestioned dominant force—lost 5-16 percentage points of share in every single city.

**The message is clear:** Buyers aren't just shifting preferences—they're redefining what "beauty" means on Whatnot. Fragrance became the priority purchase, skincare surged as self-care went mainstream, and makeup retreated to specialist status. The Instagram-makeup era is over. The signature-scent era has begun.

**Chicago and Atlanta led the fragrance surge** at 12.8% of beauty each, while Miami became the **skincare capital** at 12.0% share. Every city told a variation of the same story: scent over color, ritual over drama, identity over trends.

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#### Chicago

**The Midwest went all-in on fragrance and skincare, with clean beauty and K-beauty carving unexpected niches**

##### 1. Fragrance explodes to 12.8% of beauty

Perfume, cologne, and scent products surged **+2,704% YoY (+8.5 pp)**, reaching orders. Chicago buyers prioritized olfactory identity over visual presentation—fragrance became the ultimate personal statement.

##### 2. Skincare claims its place

Serums, moisturizers, and treatments jumped **+1,871% YoY (+2.2 pp)** to orders. The shift from covering up (makeup) to building up (skincare) accelerated dramatically.

##### 3. Tatcha becomes a luxury staple

The Japanese prestige skincare brand grew **+2,460% YoY (+0.15 pp)**, with orders. Tatcha's ritual-focused, minimalist aesthetic resonated with buyers seeking elevated self-care.

##### 4. Clean beauty breaks through

Natural, organic, and vegan beauty surged **+2,550% YoY (+0.13 pp)**, signaling that ingredient transparency matters. Chicago's wellness-conscious demographic demanded better formulations.

##### 5. Makeup collapses

Despite growing +495% in absolute terms, makeup lost **-5.3 pp** in share. Color cosmetics couldn't compete with fragrance's emotional pull or skincare's functional promise.

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#### Phoenix

**Desert buyers embraced fragrance and skincare, with luxury brands holding ground better than any other city**

##### 1. Fragrance dominates at 10.1%

Scent products jumped **+2,115% YoY (+7.3 pp)**, reaching orders. Phoenix's fragrance adoption was strong but measured—the city maintained more category balance than Chicago or Atlanta.

##### 2. Skincare surges

Treatments and serums climbed **+856% YoY (+1.6 pp)** to orders, reflecting Phoenix's climate-driven need for hydration and sun protection.

### **3. YSL and luxury fragrances thrive**

YSL reached orders (**0.28% share**, +432% YoY), the highest luxury fragrance penetration by share. Phoenix buyers showed willingness to pay premium prices for signature scents.

### **4. Tatcha leads prestige skincare**

At orders (**0.30% share**, +1,310% YoY), Phoenix showed the strongest Tatcha adoption by volume. Desert climate demands intense hydration—premium solutions win.

### **5. Makeup retreats but stays relevant**

Makeup lost **-6.2 pp** but maintained 6.7% share—the highest of any city. Phoenix buyers still invest in color, just not at makeup's former dominance levels.

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## **Atlanta**

### **The South saw the most extreme shifts: fragrance exploded, luxury collapsed, and nails emerged as a dark horse**

#### **1. Fragrance claims 12.8%—tied for #1**

Scent products skyrocketed **+3,781% YoY (+10.8 pp)**, reaching orders. Atlanta's fragrance surge was the most aggressive of any city, signaling total category transformation.

#### **2. Press-on nails explode**

Nail products jumped **+9,140% YoY (+2.4 pp)** to orders—starting from near-zero in 2024. Atlanta discovered DIY nail art as a beauty priority, bypassing salon costs for at-home glamour.

#### **3. Rhode Skin becomes the breakout brand**

Hailey Bieber's brand reached orders (**0.41% share**)—the highest share of any city. Atlanta embraced celebrity-founder skincare with minimal, effective formulations.

#### **4. Luxury beauty craters**

High-end brands fell **-14.9 pp** despite growing +17% in absolute terms. Atlanta buyers rejected traditional luxury positioning in favor of accessible prestige (Rhode, Sol de Janeiro, Tatcha).

#### **5. Makeup suffers worst collapse**

Color cosmetics lost **-15.9 pp**—the steepest decline of any category in any city. Atlanta's beauty identity shifted completely away from makeup artistry.

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## **Dallas**

### **Big Texas embraced fragrance and nails, with press-ons becoming a signature Dallas obsession**

#### **1. Fragrance leads at 11.7%**

Scent products surged **+2,803% YoY (+9.0 pp)**, reaching orders. Dallas buyers made fragrance their beauty calling card—personal scent trumped every other category.

#### **2. Press-on nails claim 2.0% of beauty**

At orders (**0.67% share**, +9,400% YoY), Dallas showed the strongest press-on nail adoption by share. DIY manicure culture found its capital—nails became self-expression without the salon premium.

#### **3. Skincare surges**

Treatments climbed **+1,433% YoY (+1.9 pp)** to orders, as Dallas buyers invested in skin health over color correction.

#### **4. Tatcha holds prestige ground**

The Japanese brand maintained strong presence (orders, 0.27% share), even losing slight share. Dallas appreciates luxury but demands functionality.

#### **5. Makeup retreats**

Color cosmetics fell **-8.0 pp**, signaling the same pattern as every other city: fragrance and skincare win, makeup loses.

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## Miami

**Magic City became the skincare capital, with Miami leading the U.S. in treatment-focused beauty**

**1. Skincare claims 12.0% —highest of any city**

Treatments, serums, and actives jumped **+1,923% YoY (+7.2 pp)**, reaching orders. Miami's beauty ethos prioritizes glowing skin over covered skin—skincare is the foundation, not an afterthought.

**2. Fragrance at 9.7% —still dominant**

Scent products grew **+3,011% YoY (+8.3 pp)** to orders. Even as the "lowest" fragrance share, Miami still saw one in ten beauty purchases go to perfume and cologne.

**3. Retinol, Vitamin C, and actives surge**

- **Retinol:** orders (0.29% share, +2,750% YoY)—highest volume
- **Hyaluronic Acid:** orders (0.28% share, +1,744% YoY)
- **Vitamin C:** orders (share)

Miami buyers are ingredient-literate and treatment-focused. They know what works and buy accordingly.

**4. Clean beauty explodes**

Natural and organic formulations jumped **+8,883% YoY (+0.83 pp)** to orders—the highest share of any city. Miami's wellness culture translated directly to beauty purchases.

**5. Makeup falls to 5.9%**

Despite losing **-10.3 pp**, makeup held stronger in Miami than Atlanta or Chicago. The city's nightlife and social culture sustains color cosmetics better than other markets.

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## The Breakout Brands: Who's Winning 2026

### Rhode Skin (Hailey Bieber's Brand)

- **Atlanta:** 0.41% share (orders, highest penetration)
- **Miami:** 0.20% share (orders, +3,800% YoY)
- **Phoenix:** 0.16% share (orders, +1,440% YoY)

**Why it's winning:** Celebrity founder credibility, minimal "skinimalism" aesthetic, peptide lip treatment became a cult product. Rhode positioned itself between drugstore and luxury—accessible prestige that delivers results.

### Tatcha (Japanese Prestige Skincare)

- **Phoenix:** 0.30% share (orders, +1,310% YoY, highest volume)
- **Atlanta:** 0.32% share (orders, +533% YoY, highest share)
- **Dallas:** 0.27% share (orders)

**Why it's winning:** Ritual-focused, ingredient-driven, Japanese beauty philosophy resonates with buyers seeking elevated self-care. Luxury skincare that justifies the price through efficacy.

### Press-On Nails (Category, Not Brand)

- **Dallas:** 0.67% share (orders, +9,400% YoY)
- **Atlanta:** 0.62% share (orders)
- **Phoenix:** 0.36% share (orders, +981% YoY)

**Why it's winning:** Salon-quality results at home, TikTok-fueled DIY culture, infinite design options. Press-ons democratized nail art—no appointment, no premium, no compromise.

### Dior Beauty (Luxury Fragrance & Makeup)

- **Miami:** 0.27% share (orders, +1,689% YoY)
- **Atlanta:** 0.20% share (orders, +775% YoY)
- **Phoenix:** 0.16% share (orders, +971% YoY)

**Why it's still relevant:** Dior's fragrance lines (Sauvage, Miss Dior) became signature scents. Luxury beauty held ground only where it offered olfactory identity, not just color.

### Sol de Janeiro (Brazilian Body Care)

- **Atlanta:** 0.41% share (orders, +350% YoY)
- **Phoenix:** 0.21% share (orders, +172% YoY)

**Why it's working:** Brazilian Bum Bum Cream's cult status, signature Cheirosa fragrances, body care as luxury category. Sol proved that scent extends beyond traditional perfume.

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## The Great Collapse: What Lost Ground

### Makeup (Every City, Every Category)

Lost share in every single city:

- Atlanta: **-15.9 pp** (worst decline)
- Miami: **-10.3 pp**
- Dallas: **-8.0 pp**
- Phoenix: **-6.2 pp**
- Chicago: **-5.3 pp**

**Why it died:** Instagram-makeup culture faded, full-coverage looks lost relevance, Gen Z embraced "no-makeup makeup" and skin-first beauty. Makeup couldn't compete with fragrance's emotional impact or skincare's functional results.

### Prestige Makeup Brands (MAC, Urban Decay, Too Faced)

Lost share in every city except Atlanta (which fell -4.1 pp). Traditional makeup brands built on color expertise couldn't pivot fast enough to fragrance or skincare.

### Luxury Beauty (as a positioning)

- Atlanta: **-14.9 pp**
- Dallas: **-2.0 pp**
- Miami: **-1.9 pp**

Traditional luxury (Chanel, La Mer, Tom Ford) lost relevance except in fragrance. Buyers rejected luxury for luxury's sake—they want functional luxury (Tatcha) or accessible luxury (Rhode).

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## What It All Means for 2026

### 1. Fragrance is identity, makeup is optional

Signature scents became the new beauty essential. Buyers invest in how they smell before how they look.  
Olfactory identity > visual identity.

### 2. Skincare is infrastructure, not indulgence

Serums, actives, and treatments aren't luxuries—they're baselines. Miami's skincare dominance (share) signals where every city is headed: ingredient-literate, results-focused, treatment-first.

### 3. Celebrity founders win when they deliver

Rhode (Hailey Bieber), Rare Beauty (Selena Gomez), and Fenty (Rihanna) all gained ground because they offered products first, celebrity second. Fame without function fails.

### 4. DIY beauty is democratizing glamour

Press-on nails exploding in Dallas and Atlanta proves buyers want salon results at home. The premium-service model is dying—accessibility wins.

### 5. Clean beauty crossed over

Natural, organic, and ingredient-conscious beauty isn't niche anymore. Miami's +8,883% YoY clean beauty growth shows that transparency and wellness won.

## **6. Luxury must be functional**

Tatcha, Rhode, and Sol de Janeiro thrived because they solve problems. Chanel and La Mer struggled because heritage alone doesn't justify price anymore.

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### **Bottom Line**

**Miami** is the skincare capital—12.0% of beauty is treatments, actives, and serums.

**Chicago and Atlanta** are fragrance capitals—tied at 12.8% scent penetration, the highest in the nation.

**Dallas** is the nail capital—0.67% press-on share, the DIY manicure epicenter.

**Phoenix** is the balanced market—fragrance, skincare, and luxury all hold meaningful share.

**Atlanta** saw the most extreme transformation—makeup collapsed -15.9 pp while fragrance surged +10.8 pp.

The race for "next Rhode" is on. Smart sellers are watching skinimalist brands, functional luxury, and celebrity-founded lines that deliver results. But the overarching truth?

**Fragrance won. Skincare is ascending. Makeup is in retreat.**

Welcome to beauty's new hierarchy. Scent is king, skin is queen, and color is court jester.

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## **BEAUTY: BRANDS & PRODUCTS**

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### **2026 Beauty Trend Report: Brand & Product Deep Dive**

#### **What Actually Sold: The Specific Scents, Serums & Shades That Defined the Year**

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### **Chicago**

**The Midwest's fragrance obsession had specific signatures—from YSL Black Opium to Baccarat Rouge**

#### **1. Dolce & Gabbana claims fragrance crown**

At orders (**0.13%**, +3,150% YoY), D&G became Chicago's signature. The One and Light Blue offered accessible Italian luxury—timeless, versatile, office-to-evening scents that worked year-round.

#### **2. YSL Black Opium becomes the nightlife scent**

Coffee, vanilla, white florals surged to orders (**0.04%**, +2,100% YoY). Black Opium became Chicago's going-out fragrance—distinctive, addictive, memorable on the dance floor.

#### **3. Baccarat Rouge 540 hits mainstream**

The TikTok luxury icon reached orders (**0.05%**, +1,200% YoY). Maison Francis Kurkdjian's amber floral became recognizable, expensive-smelling, and Instagram-worthy—the fragrance equivalent of a status symbol.

#### **4. Charlotte Tilbury Pillow Talk refuses to die**

At orders (**0.07%**, +483% YoY), Pillow Talk lipstick, liner, and blush survived makeup's collapse. The universally flattering nude became a color, not just a product—makeup's last icon standing.

#### **5. Summer Fridays makes skincare approachable**

Jet Lag Mask and Cloud Dew Gel Cream reached orders (**0.06%**, +800% YoY). Millennial pink packaging met actual efficacy—luxury skincare that doesn't intimidate.

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### **Phoenix**

**Desert buyers gravitated toward fresh aquatics and body-first fragrance—Acqua di Gio and Sol de Janeiro led**

#### **1. Acqua di Gio dominates men's fragrance**

Giorgio Armani's aquatic masterpiece hit orders (**0.07%**, +1,550% YoY). Fresh, clean, universally appealing—the safe choice that's never boring. Desert heat demands light, not heavy.

## **2. Sol de Janeiro Cheirosa becomes category**

Brazilian Bum Bum Cream's scent went standalone at orders (**0.08%**, +311% YoY). Cheirosa '62 (pistachio, salted caramel) pioneered body-first fragrance—scent from skincare, not perfume bottles.

## **3. Ariana Grande Cloud captures Gen Z**

At orders (**0.06%**, +2,800% YoY), Cloud became the Gen Z signature—sweet, marshmallow-y, under \$50. Accessible celebrity fragrance that actually smells good, not just famous.

## **4. Tatcha Rice Wash claims prestige skincare**

With 141 total Tatcha orders (**0.30%**, +1,310% YoY), Phoenix led all cities in volume. Rice Polish cleanser became the luxury ritual—Japanese heritage, visible results, worthy of the price.

## **5. Drunk Elephant holds clean clinical ground**

T.L.C. Framboos serum and Protini cream reached orders (**0.05%**). Clean-clinical positioning—dermatologist-grade meets luxury indulgence—resonated with Phoenix's wellness demographic.

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## **Atlanta**

### **The South embraced understated luxury—Jo Malone and Rhode Skin became Atlanta signatures**

#### **1. Jo Malone leads niche fragrance**

At orders (**0.15%**, +550% YoY—highest share of any city), Jo Malone's Wood Sage & Sea Salt became the "if you know, you know" scent. Understated luxury, layerable, sophisticated without screaming.

#### **2. Rhode Skin dominates at highest share**

Hailey Bieber's brand reached orders (**0.41%**—highest penetration nationally). Peptide Lip Treatment became the cult product—glossy, plumping, photographable. Celebrity founder met actual efficacy.

#### **3. Viktor & Rolf Flowerbomb for special occasions**

The explosive floral hit orders (**0.09%**, +1,500% YoY). Flowerbomb became Atlanta's "special occasion" scent—weddings, dates, moments that demand memorable fragrance.

#### **4. Press-on nails explode from near-zero**

At orders (**0.62%**, +9,140% YoY from near-zero), Atlanta discovered DIY nail art. TikTok tutorials met salon quality—no appointment, no premium, infinite designs.

#### **5. Charlotte Tilbury holds makeup ground**

Despite makeup's collapse, Charlotte Tilbury reached orders (**0.44%**—highest share). Pillow Talk and Flawless Filter survived because they're functional luxury, not just color.

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## **Dallas**

### **Big Texas wanted accessible luxury—Bath & Body Works met Versace in the middle**

#### **1. Bath & Body Works dominates accessible fragrance**

At orders (**0.09%**, +400% YoY), BBW mists led Dallas. A Thousand Wishes, Warm Vanilla Sugar, Japanese Cherry Blossom—nostalgic, customizable, under \$20. Fragrance democracy.

#### **2. Versace Dylan Blue becomes office Eros**

The sophisticated sibling reached orders (**0.06%**, +2,500% YoY). Citrus, aquatic, woody—Dylan Blue offered Eros's appeal with daytime versatility. The cologne you wear to work.

#### **3. Press-on nails claim highest share**

At orders (**0.67%**, +9,400% YoY), Dallas became the DIY manicure capital. Press-ons democratized nail art—\$10-\$30 sets that rival \$80 salon visits. Convenience killed the premium.

#### **4. Glow Recipe Watermelon becomes staple**

Watermelon Glow Niacinamide Dew Drops hit orders (**0.05%**, +600% YoY). K-beauty met Instagram—hydrating, glowy, photogenic. Watermelon as skincare became its own category.

#### **5. Too Faced Better Than Sex holds mascara**

At orders (**0.03%**), the cult mascara survived makeup's collapse. Some products transcend trends—Better Than Sex proved mascara is functional, not fashion.

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## Miami

### Magic City demanded European luxury and skincare actives—Dior, retinol, and hyaluronic acid ruled

#### 1. Dolce & Gabbana leads luxury fragrance

At orders (**0.14%**)—highest volume of any city—D&G became Miami's signature. The One, Light Blue, Dolce offered Italian elegance for nightlife, brunch, and everything between.

#### 2. Versace Eros becomes nightlife anthem

The power scent hit orders (**0.11%**, +6,500% YoY). Mint, vanilla, tonka bean—Eros became Miami's going-out cologne. Recognizable, bold, unapologetic. The scent of South Beach.

#### 3. Retinol reaches highest penetration

At orders (**0.29%**, +2,750% YoY), Miami led retinol adoption. From The Ordinary (\$10) to luxury serums (\$200+), actives transcended brands. Anti-aging became age prevention—20-somethings started early.

#### 4. Hyaluronic acid claims skincare share

At orders (**0.28%**, +1,744% YoY), hydration became baseline. Serums, moisturizers, masks—all featured HA. "Plump" and "dewy" replaced "matte" and "full coverage" as beauty goals.

#### 5. Summer Fridays leads accessible luxury

Jet Lag Mask and Cloud Dew reached orders (**0.07%**, +1,233% YoY—highest volume). Millennial pink packaging, Instagram aesthetic, actual results—luxury skincare made approachable.

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## The Top 10 Products That Defined Beauty in 2025

### Fragrances

#### 1. Dolce & Gabbana (279 total orders)

Miami led (85), Chicago (65), Phoenix (57). Italian heritage, versatile scents, accessible luxury pricing (\$60-\$120).

#### 2. Versace Eros (208 total orders)

Miami's nightlife king (66, +6,500% YoY), Chicago (46), Phoenix (41). The signature power cologne under \$100.

#### 3. Baccarat Rouge 540 (119 total orders)

Phoenix (30), Miami (30, +900% YoY), Chicago (26, +1,200% YoY). TikTok's luxury icon—\$325 but worth every cent for the recognizable amber floral.

#### 4. Dior Sauvage (101 total orders)

Phoenix (26, +1,200% YoY), Miami (25, +1,150% YoY), Chicago (24, +2,300% YoY). Fresh, spicy, universally recognized men's fragrance.

#### 5. Ariana Grande Cloud (110 total orders)

Phoenix (29, +2,800% YoY), Chicago (23, +1,050% YoY), Miami (21, +2,000% YoY). Gen Z's signature scent under \$50—sweet, wearable, accessible.

### Skincare

#### 6. Rhode Peptide Lip Treatment (146 total orders)

Miami (37, +1,750% YoY), Chicago (35), Phoenix (28, +833% YoY). Hailey Bieber's genius—peptides, glow, plump, photogenic. The \$16 product that changed celebrity beauty.

#### 7. Summer Fridays Jet Lag Mask (149 total orders)

Miami (40, +1,233% YoY), Phoenix (35, +150% YoY), Chicago (27, +800% YoY). Millennial pink, Instagram-ready, actually effective. Luxury skincare for the masses.

#### 8. Glow Recipe Watermelon Glow (89 total orders)

Miami (27, +575% YoY), Phoenix (23), Dallas (21, +600% YoY). K-beauty meets watermelon—Niacinamide Dew Drops became the dewy-skin essential.

#### 9. Charlotte Tilbury Pillow Talk (120 total orders)

Chicago (35, +483% YoY), Miami (35, +250% YoY), Dallas (22). The universally flattering nude that survived makeup's collapse. A color, not just a product.

## **10. Press-On Nails** (1,176 total orders)

Dallas led (285, +9,400% YoY), Atlanta (109, +9,140% YoY), Phoenix (173, +981% YoY). DIY manicure culture killed the salon premium—\$10-\$30 sets that rival \$80 visits.

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## **The Supporting Cast: Notable Performers**

**JO MALONE (orders)** - Atlanta led (26, 0.15%, +550% YoY). Wood Sage & Sea Salt became the understated luxury signature.

**LE LABO SANTAL 33 (orders)** - Brooklyn's cool-kid scent went national. Woody, leathery, unisex—Another 13 also gained ground.

**BYREDO (orders)** - Gypsy Water, Bal d'Afrique positioned Byredo as avant-garde luxury alternative.

**YSL BLACK OPIUM (orders)** - Chicago's nightlife scent (22, +2,100% YoY). Coffee, vanilla, white florals.

**TATCHA (Phoenix: orders, 0.30%)** - Rice Polish cleanser, Dewy Skin Cream became Japanese luxury standards.

**NARS LAGUNA BRONZER (orders)** - The bronzer that refuses to die. Functional sun-kissed glow survived makeup's collapse.

**THE ORDINARY (orders)** - Ingredient transparency at drugstore prices. Niacinamide 10% + Zinc 1% democratized actives.

**CERAVE (orders)** - Dermatologist favorite went mainstream. Ceramides, hyaluronic acid, no BS—results over branding.

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## **What This All Means**

### **1. Specific scents became signatures**

Buyers didn't buy "fragrance"—they bought Versace Eros for nightlife, Dior Sauvage for work, Ariana Grande Cloud for everyday. Scent became identity.

### **2. Celebrity founders won when products delivered**

Rhode (Hailey Bieber) succeeded because Peptide Lip Treatment works. Fame without function fails—efficacy matters more than endorsement.

### **3. Accessible luxury is the sweet spot**

\$20-\$70 products that look expensive, work well, photograph beautifully. Summer Fridays, Rhode, Glow Recipe nailed this positioning.

### **4. Actives transcended brands**

Miami's retinol (orders, +2,750% YoY) and hyaluronic acid (orders, +1,744% YoY) proved ingredient literacy matters. Buyers know formulations, not just logos.

### **5. Press-ons killed salon culture**

Dallas and Atlanta's +9,000% YoY growth wasn't a trend—it was infrastructure. DIY manicures became permanent, not pandemic.

### **6. Makeup survived only when functional**

Charlotte Tilbury Pillow Talk, NARS Laguna, Fenty Gloss Bomb—these products solve problems (flattering nude, sun-kissed glow, glossy lips). Everything else collapsed.

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## **Bottom Line: The Products That Won**

**Miami** bought luxury European scents (Dolce & Gabbana, Versace, Dior) and skincare actives (retinol, hyaluronic acid).

**Chicago** embraced nightlife fragrances (YSL Black Opium, Baccarat Rouge) and accessible prestige (Summer Fridays, Rhode).

**Phoenix** chose fresh aquatics (Acqua di Gio, Dior Sauvage) and Japanese luxury skincare (Tatcha, Drunk Elephant).

**Dallas** blended accessible (Bath & Body Works) with sophisticated (Versace Dylan Blue) and pioneered press-on nails.

**Atlanta** claimed understated luxury (Jo Malone, Flowerbomb) and celebrity-founded skincare (Rhode at highest share).

These weren't just purchases—they were identity statements. Welcome to beauty's new era, where what you smell like matters more than what you look like.

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## SPORTS CARDS

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### 2026 Sports Cards Trend Report

#### Five Cities, One Revolution: NFL Overtakes Basketball as Hometown Heroes Rule

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##### The Big Picture: Football Claims the Crown

2025 marked a seismic power shift in sports card collecting: **NFL cards overtook NBA as the dominant force** across all five cities. Football gained 2.4-7.8 percentage points of share while basketball growth lagged behind in every market. The Patrick Mahomes dynasty, rookie quarterback mania (Caleb Williams, Jayden Daniels, CJ Stroud), and the weekly drama of the NFL season created year-round collecting engagement.

But the transformation went deeper than just sport preferences. **Hometown teams became the #1 collecting category:**

- **Chicago Bears** surged to #2 overall (orders) in Chicago's backyard
- **Miami Heat** claimed #1 nationally (5,139 total orders)
- **Atlanta Braves** (+220% YoY) and **Atlanta Falcons** (+372-675% YoY) dominated their home market
- **Dallas Cowboys** reached orders, led by Dallas collectors going all-in

Meanwhile, **Victor Wembanyama—2024's rookie king—collapsed** from orders across all cities in 2024 to just 647 in 2025 (-73% YoY), as the hype cycle moved on and collectors chased new narratives. **Atlanta became the fastest-growing market** (+155% YoY), proving that hometown fandom drives explosive growth when local teams deliver narratives worth chasing.

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#### Chicago

##### The Windy City embraced hometown heroes—Bears and Cubs dominated as NFL claimed 7.7% of the market

###### 1. NFL reaches 7.7%—up from 5.3%

Football jumped **+193% YoY (+2.4 pp)**, reaching orders. Chicago collectors pivoted toward NFL dominance—driven by Caleb Williams (#1 pick), Justin Fields trade drama, and Bears playoff hopes. Football became year-round collecting priority.

###### 2. Chicago Bears surge to #2 nationally

At orders in Chicago (**+242% YoY**), Bears cards exploded. Caleb Williams draft hype, DJ Moore's consistency, and Matt Eberflus's coaching narrative created sustained local demand. **Total Bears orders: 4,035 across all cities**—proving Chicago fandom travels.

###### 3. Chicago Cubs remain baseball anchor

At orders (**+58% YoY**), Cubs cards held strong despite modest growth. Wrigleyville nostalgia, Dansby Swanson's arrival, and "lovable losers" narrative sustained collecting interest. **Total Cubs orders: 3,609 nationally**—third-highest MLB team.

###### 4. Chicago Bulls hold basketball ground

At orders (**+136% YoY**), Bulls cards grew but couldn't match NFL's surge. DeMar DeRozan's departure and

Zach LaVine trade rumors created uncertainty—collectors wanted legacy (Jordan) more than present (Coby White).

#### **5. Miami Heat dominates NBA across cities**

At orders in Chicago (**+236% YoY**), Heat cards proved hometown fandom isn't required. Jimmy Butler's playoff mystique and Heat culture created national collecting appeal. **Total Heat orders: 5,139**—#1 team nationally.

#### **6. Patrick Mahomes becomes Kansas City export**

At orders (**+575% YoY**), Mahomes cards surged in Chicago despite no local connection. Dynasty collecting transcends geography—three Super Bowls in five years created investment-grade status.

#### **7. Caleb Williams rookie mania hits orders**

At +233% YoY, the #1 pick's cards became Chicago's most-traded rookie asset. Bears fans went all-in on "franchise savior" narrative—rookie QB cards = lottery tickets.

#### **8. WWE surges +634% YoY**

At orders (0.8% share, +0.59 pp), wrestling cards became legitimate category. CM Punk's return, WrestleMania in Chicago, and nostalgia collecting fueled growth. WWE is infrastructure now, not niche.

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## **Phoenix**

### **The desert embraced NFL dominance while singles collecting surged—National Treasures and premium products found their market**

#### **1. NFL claims 8.6% of cards—up from 5.1%**

Football jumped **+302% YoY (+3.5 pp)**, reaching orders. Phoenix collectors pivoted hard toward NFL—driven by Chiefs dynasty fatigue meeting new excitement (CJ Stroud, Jayden Daniels, Caleb Williams). The sport's weekly drama and fantasy relevance made it the year-round collecting priority.

#### **2. Singles explode to 36.4% of market**

At orders (**+191% YoY, +6.6 pp**), singles became the dominant format. Phoenix collectors shifted from team breaks to targeted player hunting—chasing specific rookies, parallel cards, and investment pieces. The "buy what you want, not what you get" mentality won.

#### **3. Kansas City Chiefs and 49ers lead teams**

- **Chiefs:** orders (0.35%, +564% YoY) - Dynasty fatigue didn't stop Mahomes mania
- **49ers:** orders (0.34%, +349% YoY) - Bay Area proximity and CMC/Purdy appeal
- **Eagles:** orders (0.34%, +673% YoY) - Jalen Hurts kept Philadelphia relevant

#### **4. Local teams hold but don't dominate**

Phoenix Suns reached orders (0.32%, +98% YoY)—respectable but not market-leading. The Suns' playoff struggles and Kevin Durant's age narrative kept basketball collectors lukewarm compared to NFL's explosiveness.

#### **5. Victor Wembanyama hype dies**

From orders (share) in 2024 to just 226 (0.11%) in 2025—a **-68% collapse**. The rookie honeymoon ended. Collectors moved on to Chet Holmgren, then realized neither was the next LeBron. Hype cycles are brutal.

#### **6. National Treasures surges as premium wins**

At orders (**+1,252% YoY, +1.2 pp**), NT became the aspirational product. Phoenix collectors traded volume for value—fewer boxes, higher-end hits. Flawless, NT, and premium Prizm parallels replaced blaster rips.

#### **7. Shohei Ohtani finds desert relevance**

At orders (0.09%, +188% YoY), Ohtani's Dodgers move and two-way dominance created crossover appeal. Baseball's biggest star became a collecting category—Phoenix recognized greatness.

#### **8. Downtown and Kaboom chase intensifies**

Downtown inserts surged +554% YoY (0.71 pp), Kaboom +332% (0.20 pp). Insert hunting became its own game—collectors chased the "lottery ticket" cards that could 10x in value overnight.

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## Dallas

### **Big D went all-in on Cowboys and hometown pride—NFL claimed 8.1% as local teams dominated collecting behavior**

#### **1. NFL reaches 8.1%—highest football share except Atlanta**

Football jumped **+269% YoY (+3.4 pp)**, hitting orders. Dallas collectors made NFL the priority—Cowboys resurgence, CeeDee Lamb's dominance, and Dak Prescott's playoff narrative drove sustained demand.

#### **2. Dallas Cowboys claim 1,058 local orders**

At +515% YoY, Cowboys cards became Dallas's #1 collecting category. America's Team isn't national anymore—it's hyperlocal. Jerry World, star players, and "this is our year" hope created year-round collecting obsession.

**Total Cowboys: orders**—#3 team nationally.

#### **3. NBA holds 6.7%—second-highest share**

Basketball reached orders (**+159% YoY, +1.1 pp**). Dallas Mavericks' Finals run, Luka Dončić's brilliance, and Kyrie Irving's redemption arc kept NBA cards relevant. Dallas sustained basketball better than Phoenix or Chicago.

#### **4. Luka Dončić fades despite Finals run**

At just orders (**-40% YoY**), Luka cards collapsed. Finals loss, stat inflation, and "empty stats" narrative killed collecting momentum. Superstardom without championships = declining value.

#### **5. MLB surges +294% YoY**

Baseball jumped to orders (**+1.5 pp**), driven by Texas Rangers' 2023 championship hangover and Corey Seager's consistent excellence. Baseball nostalgia met recent success—collectors bought in.

#### **6. Victor Wembanyama crashes -82%**

From orders (share) in 2024 to just 161 (0.1%) in 2025. Dallas's proximity to San Antonio didn't save Wembly—rookie hype died fast. Collectors moved on to Chet Holmgren, then realized neither was the next LeBron.

#### **7. Atlanta Hawks cards surge +320% YoY**

At orders, Hawks cards found Dallas appeal despite no local connection. Trae Young's scoring, Dejounte Murray trade, and playoff competitiveness created investment interest. Good basketball sells anywhere.

#### **8. Jayden Daniels explodes +999% from 0**

The Heisman winner reached orders from nothing—rookie QB mania knows no city limits. Commanders fans in Dallas? No. Collectors chasing the next franchise QB? Absolutely.

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## Atlanta

### **The South saw the most explosive growth (+155% YoY)—hometown Braves and Falcons dominated as NFL claimed 10.4%**

#### **1. NFL reaches 10.4%—highest football share nationally**

Football exploded **+944% YoY (+7.8 pp)**, hitting orders. Atlanta's NFL obsession surpassed every other city—Falcons resurgence, Bijan Robinson hype, and Southern football culture made NFL cards the dominant force.

#### **2. Atlanta Falcons surge to 3,370 total orders**

Local orders drove growth: Atlanta collectors went all-in on hometown team (+372-675% YoY across cities). Arthur Smith's firing, Raheem Morris's arrival, and Bijan Robinson's rookie season created year-round narrative. **#6 team nationally**.

#### **3. MLB reaches 7.3%—highest baseball share**

Baseball jumped to orders (**+360% YoY, +3.3 pp**). Atlanta Braves' championship window, Ronald Acuña Jr.'s brilliance, and Truist Park culture sustained MLB collecting better than any other city. Baseball matters in Atlanta.

#### **4. Atlanta Braves reach 569 local orders**

At +220% YoY, Braves cards became Atlanta's baseball obsession. Recent championships (2021), young core (Acuña, Olson, Riley), and Southern baseball tradition created sustained demand. **Total Braves: orders**—#9 team nationally.

#### **5. Atlanta Hawks hold orders in Chicago**

Hawks cards found strange appeal in Chicago (+139% YoY). Trae Young's villain narrative in Chicago (playoff

battles), Dejounte Murray's star power, and competitive basketball kept Hawks relevant nationally. **Total Hawks: orders**—#4 team nationally.

#### 6. Soccer explodes +850% YoY

At orders (1.4% share, **+1.0 pp**), soccer cards found Atlanta relevance. Atlanta United's MLS success, international demographic, and Messi's Inter Miami effect created soccer collecting infrastructure. Highest soccer share nationally.

#### 7. Victor Wembanyama crashes -80-90% YoY

Atlanta collectors abandoned Wemby like everyone else. From hundreds of orders to double digits—rookie hype is unforgiving. Collectors chase new narratives fast.

#### 8. UFC reaches 1.2% share

At orders (**+240% YoY**), MMA cards found Atlanta appeal. UFC events, Southern combat sports culture, and Topps Chrome UCC product created sustained demand. Combat sports are infrastructure.

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## Miami

### Magic City went all-in on local heroes and NFL explosion—box breaks dominated as community collecting thrived

#### 1. NFL reaches 9.6%—highest share of any sport

Football skyrocketed **+253% YoY (+4.1 pp)**, hitting orders. Miami's NFL obsession—Dolphins resurgence, Tua narrative, local pride—made football cards the dominant force. Sundays became card-collecting Sundays.

#### 2. Miami Heat becomes #1 team nationally

At orders (0.93%, +267% YoY), the Heat became the most-collected team across Phoenix and Miami combined. Jimmy Butler, Tyler Herro, and Heat culture created year-round demand—even without championship runs.

#### 3. Miami Dolphins surge as local pride peaks

At orders (0.69%, +279% YoY), Dolphins cards became a local obsession. Tua Tagovailoa's health narrative, Tyreek Hill's explosiveness, and playoff hope made Dolphins cards non-negotiable for Miami collectors.

#### 4. Box breaks claim 9.1% of market

At orders (**+257% YoY, +3.9 pp**), box breaks became infrastructure. Miami's community-focused collecting culture—friends ripping together, Discord groups, shared hits—made breaks social events, not just transactions.

#### 5. Optic dominates product lines

At orders (**+490% YoY, +3.3 pp**), Donruss Optic became Miami's signature product. Affordable, flashy, rookie-heavy—Optic hit the sweet spot between accessible and exciting. Blasters, megas, and hobby boxes all surged.

#### 6. NBA holds 7.5%—up slightly

Basketball gained +1.5 pp (orders, +156% YoY), driven by Heat fandom and LeBron Lakers nostalgia. Miami's basketball culture sustained NBA cards better than Phoenix, but football still won.

#### 7. Messi maintains Miami relevance

At orders (0.10%, +35% YoY), Lionel Messi's Inter Miami presence kept soccer cards alive. The GOAT effect is real—even in a football-dominated market, Messi's cultural gravity matters.

#### 8. Premium products surge across the board

- **Downtown:** +585% YoY (+1.2 pp)
- **National Treasures:** +520% YoY (+0.7 pp)
- **Flawless:** +380% YoY (+0.5 pp)

Miami collectors chased high-end hits. The \$5 blaster mentality lost ground to "\$500 hobby box with a \$2,000 hit" gambles.

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## The Players That Mattered

### Top 15 Individual Players by 2025 Volume (All Cities)

#### 1. Victor Wembanyama (647 total, but **-73% YoY nationally**)

The fallen king. From orders in 2024 to 647 in 2025. Rookie hype crashed hard across every city:

- Phoenix: 191 (-72% YoY from 681)
- Dallas: 161 (-82% YoY from 882)
- Chicago: 139 (-84% YoY from 869)

Collectors realized generational talent doesn't equal generational collecting interest. The hype cycle is unforgiving.

## **2. Shohei Ohtani** (525 total, +114-257% YoY)

Baseball's unicorn sustained demand across all markets. Dodgers move, two-way dominance, and "once in a lifetime" narrative created investment-grade status.

- Chicago: 173 (+114% YoY)
- Phoenix: 128 (+167% YoY)
- Atlanta: 82 (+257% YoY)

## **3. Elly De La Cruz** (326 total, +157-312% YoY)

MLB's most electric player. Speed, power, highlight-reel plays made Elly the "most exciting young player in baseball"—collectors responded enthusiastically.

## **4. Paul Skenes** (305 total, +86-460% YoY)

The next pitching phenom. Rookie cards surged as collectors bet on the next Strasburg/Kershaw narrative. Chicago led adoption (+460% YoY).

## **5. LeBron James** (280 total)

The evergreen GOAT. At age 40, LeBron cards still move—Lakers nostalgia, legacy chasing, and "last dance" narrative sustained demand across all cities. Timeless.

## **6. Patrick Mahomes** (275 total, +95-575% YoY)

Chiefs dynasty created blue-chip investment status. Three Super Bowls in five years = sustained demand regardless of geography. Chicago led with orders (+575% YoY).

## **7. Luka Dončić** (268 total, but -40% YoY in Dallas)

The Slovenian superstar held national appeal but faded in Dallas (-40%). Finals loss, "empty stats" narrative, and Kyrie partnership concerns killed local momentum. Superstardom without championships = declining value.

## **8. Jayden Daniels** (251 total, +999-7,000% YoY)

The 2024 Heisman winner exploded from near-zero. Rookie QB mania transcended geography—Commanders fans nationwide chased the franchise savior narrative.

- Chicago: 71 (+7,000% YoY from 1)
- Phoenix: 63 (+3,050% YoY from 2)

## **9. Caleb Williams** (199 total, +233-575% YoY)

The #1 pick drove Chicago collecting (+233% YoY, orders). Bears fans went all-in on franchise QB hope. Rookie quarterback cards = lottery tickets.

## **10. Brock Purdy** (118 total)

Mr. Irrelevant sustained relevance. 49ers' success, Iowa State underdog story, and "system QB" debate created collecting intrigue. Controversy = demand.

## **11. CJ Stroud** (108 total, but -58-70% YoY in most markets)

The 2023 sensation faded in 2025. Sophomore slump, Texans regression, and "was it real?" doubt killed momentum. Collectors moved to Daniels and Williams.

## **12. Anthony Edwards** (102 total, -51 to -85% YoY)

Ant-Man crashed across every city. Playoff disappointment, Timberwolves struggles, and "entertainment ≠ value" realization killed cards. Fun doesn't equal collecting value.

## **13. Chet Holmgren** (82 total, mixed results)

The Wembly alternative found modest appeal. Dallas led (orders, +138% YoY) as collectors bet on Thunder's future. Holmgren became "the other unicorn."

## **14-15. Regional stars** (various totals)

Devin Booker (Phoenix), Trae Young (Atlanta), specific local heroes sustained niche demand but couldn't

transcend markets like Mahomes or LeBron.

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## The Teams That Won

### Top 15 Teams by 2025 Volume (All Cities)

#### 1. Miami Heat (5,139 total) - National dominance through Heat culture

Local + national appeal. Miami collectors (1,311), Phoenix (1,193), Chicago (1,116). Jimmy Butler mystique, playoff consistency, and "Heat culture" created year-round demand regardless of geography.

#### 2. Chicago Bears (4,035 total) - Hometown obsession meets Caleb Williams hype

Chicago collectors (1,769, +242% YoY) drove growth, but Bears fandom traveled—Dallas (643), Phoenix (624). #1 pick narrative + franchise QB hope = national collecting interest.

#### 3. Dallas Cowboys (3,710 total) - America's Team became hyperlocal

Dallas led (1,058, +515% YoY), but Cowboys cards sold everywhere—Chicago (852), Phoenix (766). Jerry World, CeeDee Lamb, and "this is our year" sustained demand.

#### 4. Atlanta Hawks (3,616 total) - Competitive basketball sells

Chicago bizarrely led (914), followed by Phoenix (857), Dallas (832). Trae Young's villain narrative, Dejounte Murray's star power, and playoff competitiveness created national appeal.

#### 5. Chicago Cubs (3,609 total) - Wrigleyville nostalgia endures

Chicago dominated (1,491), Atlanta (689), Phoenix (632). Cubs culture transcends winning—lovable losers, Wrigley Field, and baseball tradition sustained collecting interest.

#### 6. Atlanta Falcons (3,370 total) - Southern football culture explodes

Chicago (935, +372% YoY), Dallas (716, +575%), Phoenix (625). Bijan Robinson rookie hype, coaching changes, and playoff hope created national Falcons interest.

#### 7. Kansas City Chiefs (3,230 total) - Dynasty collecting works

Chicago (828), Phoenix (710, +564% YoY), Dallas (692). Three Super Bowls in five years = sustained demand. Mahomes + Kelce duo created blue-chip team status.

#### 8. San Francisco 49ers (1,813 total) - CMC + Purdy narrative

Distributed appeal: Chicago (487), Phoenix (386), Dallas (383). No single city dominated—49ers' national relevance through consistent excellence drove broad collecting.

#### 9. Atlanta Braves (1,706 total) - Championship window sustains demand

Atlanta led (569, +220% YoY), Dallas (405), Phoenix (286). Recent championship, young core (Acuña, Olson), and Southern baseball tradition created sustained interest.

#### 10. Chicago Bulls (1,691 total) - Jordan legacy > current roster

Chicago (508), Phoenix (399), Dallas (394). Bulls cards sustained by nostalgia more than present—collectors want Jordan, not Coby White.

#### 11. LA Dodgers (1,603 total) - Ohtani effect

Phoenix (431), Atlanta (347, +294% YoY), Chicago (334). Shohei's arrival, perennial contention, and "baseball's Yankees" status sustained national demand.

#### 12. Phoenix Suns (1,594 total) - Local hero + KD aging narrative

Phoenix dominated (657, +98% YoY), Dallas (291), Chicago (276). Kevin Durant's declining prime and playoff disappointment limited growth. Local fandom kept Suns relevant.

#### 13. Chicago White Sox (1,594 total) - South Side loyalty

Chicago led (526), Atlanta (340), Phoenix (334). Worst record in baseball history (2024) didn't kill collecting—White Sox fans are loyal through pain.

#### 14. LA Lakers (847 total) - LeBron's last dance

Distributed appeal: Phoenix (243), Dallas (222), Chicago (152). Lakers mystique + LeBron's final years sustained modest demand. Not dominant, but evergreen.

#### 15. Miami Dolphins (600+ total, Miami-heavy) - Local obsession

Tua narrative, Tyreek Hill explosiveness, and hometown pride drove Miami collecting. Dolphins became non-negotiable for local collectors.

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## The Product Lines That Defined 2025

### Phoenix Product Breakdown

#### Singles dominated at 36.4% (orders, +191% YoY)

Collectors wanted control—targeted player hunting replaced random team breaks. The "buy what you want" era arrived.

#### National Treasures became aspirational (+1,252% YoY, 1.2 pp)

Premium products replaced volume. Phoenix collectors traded quantity for quality—fewer rips, bigger hits.

#### Downtown/Kaboom chase intensified (+554% / +332% YoY)

Insert hunting became lottery-ticket gambling. Collectors chased the 1:case hits that could 10x overnight.

### Miami Product Breakdown

#### Box breaks claimed 9.1% (orders, +257% YoY)

Community collecting thrived. Miami's social card culture made breaks events—Discord groups, watch parties, shared hits.

#### Optic dominated at 5.0% (orders, +490% YoY)

Affordable, flashy, rookie-heavy. Donruss Optic hit the sweet spot—accessible enough for volume, exciting enough for hits.

#### Donruss overall surged (+542% YoY, +2.2 pp)

Donruss family (Optic, Elite, base) became Miami's signature. Panini's flagship lines won over high-end alternatives for everyday rippers.

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## What Died: The 2024 Hype That Faded

### Victor Wembanyama's Collapse

From orders (0.94% combined share) to 330 (-75% YoY). The hype cycle is brutal—rookie of the year couldn't sustain collector interest beyond year one. Lesson: Generational talent ≠ generational collecting asset.

### Anthony Edwards Fade

From orders in Phoenix (2024) to just 16 (2025)—an **-83% crash**. Ant-Man's playoff runs didn't translate to sustained card demand. Entertainment value ≠ collecting value.

### Aaron Judge Decline

From orders (Miami 2024) to 27 (2025)—a **-53% drop**. Even MVP seasons can't sustain collecting interest without championships or narrative momentum. Baseball's challenge: individual excellence without team success = limited upside.

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## What It All Means for 2026

### 1. NFL is king, and it's not close

Football gained 3.5-4.1 pp of share in both cities. Basketball held flat or declined. The NFL's weekly drama, fantasy relevance, and rookie QB mania created year-round collecting engagement. Football cards are the new default.

### 2. Singles replaced breaks as primary format

Phoenix's +6.6 pp singles gain signals a fundamental shift: collectors want control. Team breaks feel like gambling. Singles feel like investing. The "buy what you want" mentality won.

### 3. Local heroes drive sustained demand

Miami Heat (#1 team), Miami Dolphins (#2), Phoenix Suns (#8)—hometown fandom trumps national narratives. Smart sellers stock local teams heavily. Community matters more than hype.

### 4. Premium products won the value game

National Treasures (+520-1,252% YoY), Flawless (+380%), Downtown (+554-585%)—collectors traded volume for value. Fewer rips, bigger hits. The \$5 blaster era is dying. The \$500 hobby box era arrived.

### 5. Rookie hype cycles are shorter and more brutal

Wembanyama's -75% YoY collapse proves the market moves fast. Collectors chase the next narrative before the

current one proves itself. Patience died. FOMO won.

#### **6. Box breaks = community, Singles = investment**

Miami's box break surge (+257% YoY) vs. Phoenix's singles explosion (+191%) represents two collecting philosophies:

- **Miami:** Social, community-driven, shared experience
- **Phoenix:** Individual, investment-focused, targeted hunting

Both work. Different motivations, same passion.

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### **Bottom Line**

**Chicago** became the hometown hero capital—Bears (#2 team) and Cubs (#5 team) dominated local collecting, proving franchise loyalty transcends winning records.

**Phoenix** became the singles capital—targeted player hunting, premium products (National Treasures +1,252% YoY), and NFL dominance defined the market.

**Dallas** went all-in on Cowboys—America's Team became hyperlocal obsession (+515% YoY), with NFL claiming 8.1% of cards.

**Miami** became the community capital—box breaks (+257% YoY), hometown heroes (Heat #1, Dolphins local obsession), and Optic dominance (+490% YoY) drove volume.

**Atlanta** saw the most explosive growth (+155% YoY overall)—NFL reached 10.4% share (highest nationally), MLB claimed 7.3% (Braves championship culture), and hometown teams (Falcons, Braves) dominated.

**NFL** dethroned NBA as the collecting priority across every city. Football's weekly drama and rookie QB narratives (Caleb Williams, Jayden Daniels) created sustainable year-round demand.

**Victor Wembanyama** proved that hype cycles are shorter and more brutal than ever (-73% YoY nationally). Collectors move on fast. Generational talent ≠ generational collecting asset.

**Hometown teams** became the #1 collecting driver. Miami Heat (#1), Chicago Bears (#2), Dallas Cowboys (#3), Atlanta teams (Falcons #6, Braves #9) proved local fandom trumps national narratives.

**Premium products** replaced volume ripping. National Treasures (+520-1,252% YoY), Downtown (+554-585% YoY), and Flawless (+380% YoY) became the chase. Quality over quantity won.

The race for "next Mahomes" is on. Smart sellers are watching Jayden Daniels (+999-7,000% YoY), Caleb Williams (+233% YoY in Chicago), and hometown narratives (Bijan Robinson in Atlanta). But the overarching truth?

**Football won. Hometown won. Premium won. Everything else is secondary.**

Welcome to sports cards' new hierarchy. NFL is king, hometown heroes are infrastructure, and premium products are aspirational. Local fandom drives sustained demand better than national hype.