

Toys and Games in Brazil

July 2025

Table of Contents

Toys and Games in Brazil

EXECUTIVE SUMMARY

Kidult trend and established brands continue to drive growth

KEY DATA FINDINGS

Chart 1 - Key Trends 2024

INDUSTRY PERFORMANCE

Cloud gaming and subscription services drive growth in video games

Estrela capitalises on nostalgia with Xuxa doll relaunch

Chart 2 - Estrela Relaunches Xuxa Doll Based on Brazilian TV Presenter Xuxa Meneghel

Disney leverages brand recognition as dolls and accessories experiences decline

Mobile restrictions in schools see children embrace traditional games and outdoor play

WHAT'S NEXT?

Video games to lead toy and games expansion over the forecast period

Growth supported by digital expansion and continued popularity of licenced products

Diverse market strategy required in challenging environment

COMPETITIVE LANDSCAPE

Mattel leads, while Hasbro declines due to franchise weakness

Share gain for Krafton, while Sunny invests in Pokémon licences

Lego partners with Galápagos to enter board games

Chart 3 - Lego and Galápagos Combine to Create New Lego Monkey Palace Board Game

CHANNELS

E-commerce remains dominant, but in-store experience still matters for retailers

Chart 4 - Analyst Insight

Ri Happy toy retailer partners with Estrela to introduce limited-edition retro line of classic toys

ECONOMIC CONTEXT

Chart 5 - Real GDP Growth and Inflation 2019-2029

Chart 6 - PEST Analysis in Brazil 2024

CONSUMER CONTEXT

Chart 7 - Key Insights on Consumers in Brazil 2024

Chart 8 - Consumer Landscape in Brazil 2024

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

Traditional Toys and Games in Brazil

KEY DATA FINDINGS

2024 DEVELOPMENTS

Construction toys is most dynamic, as kidult trend and licensing contribute to growth

Chart 9 - Key Trends 2024

INDUSTRY PERFORMANCE

Traditional toys and games benefits from phone restrictions and licensing; construction leads growth Lego leverages nostalgia with McLaren edition to drive growth

Chart 10 - Special Edition Lego Senna Mclaren Leverages Nostalgia Among Kidults

Lego expands its reach with hybrid construction/board game concept

Chart 11 - Newly Launched Lego Monkey Palace Combines Construction With a Board Game

Mobile phone ban in schools helps drive dynamism of games and puzzles

Chart 12 - Analyst Insight

WHAT'S NEXT?

Further growth for traditional toys and games to be supported by the kidult trend; dolls and accessories will maintain its lead

Screen time concerns will drive shift towards traditional toys and games

Upcoming films expected to stimulate growth in action figures and accessories

COMPETITIVE LANDSCAPE

Mattel gains share, while Hasbro and Estrela face challenges

Sunny invests in licences and expands product selection to target adult collectors

CHANNELS

Mercado Livre supports competitive pricing in retail e-commerce

Toy retailer Ri Happy partners with Estrela to release limited-edition toy

COUNTRY REPORTS DISCLAIMER

Video Games in Brazil

KEY DATA FINDINGS

2024 DEVELOPMENTS

Shift towards multi-platform gaming and increase in subscription services

Chart 13 - Key Trends 2024

INDUSTRY PERFORMANCE

Video games software thrives as subscriptions and cloud gaming services increase

Xbox expands cloud gaming, positioning itself as a cost-effective platform

Chart 14 - Xbox Cloud Gaming Expands Access Beyond Consoles

WHAT'S NEXT?

Video games software, cloud gaming and subscriptions to drive growth

Chart 15 - Analyst Insight

Focus on core brands to reinforce consumer loyalty

Investment in local games production to increase, despite affordability concerns

COMPETITIVE LANDSCAPE

Xbox One Brand Maintains Microsoft position while PlayStation 5 faces challenges

Krafton's franchise success drives share increase in video games

Legend of Zelda and Final Fantasy drive sales with nostalgic appeal

Subscription services help firms increase their revenues

Cloud gaming adoption requires better infrastructure to address latency issues

CHANNELS

Retail e-commerce remains the primary sales channel for video games

Mercado Livre launches new digital products category

Chart 16 - Mercado Livre Frequently Launches Promotions on Video Games and Accessories

Local consumers embrace e-commerce due to price sensitivity

COUNTRY REPORTS DISCLAIMER

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- Strategy Briefings: Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- Company Profiles: Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- Country Reports: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/toys-and-games-in-brazil/report.