

# Traditional Toys and Games in Indonesia

June 2025

**Table of Contents** 

## Traditional Toys and Games in Indonesia - Category analysis

## **KEY DATA FINDINGS**

## 2024 DEVELOPMENTS

Nostalgia and collectibles drive demand, supported by strategic brand partnerships Chart 1 - Key Trends 2024

## INDUSTRY PERFORMANCE

Dolls and accessories and Lego drive growth in traditional toys and games ZD Toys benefits from kidult spending and social media buzz

Gen Z and kidults drive value growth for collectibles from Pop Mart and Fugglers

Lego Formula 1 partnership boosts sales and enhances brand image

Chart 2 - LEGO and Formula 1 Partnership Drives Growth in Indonesia in 2024

Chart 3 - Analyst Insight

## WHAT'S NEXT?

Dolls and accessories set to experience the fastest growth in traditional toys and games Kidults, education, and technology will shape traditional toys and games Physical stores to drive sales; localisation to broaden market penetration

## COMPETITIVE LANDSCAPE

Mattel leads as concentration increases within traditional toys and games

Pop Mart's blind box strategy resonates with Indonesian kidult collectors

Chart 4 - Teen and Kidult Craze for Collectibles Boosts Pop Mart's Market Share in 2024

ELC Indonesia launches the Miko 3 Smart Robot for young children

## **CHANNELS**

Offline channels lead, with traditional toys and games stores performing strongly Although offline stores remain key, e-commerce continues to expand Lego store's barcode scanner shows animated models on a digital screen

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## Toys and Games in Indonesia - Industry Overview

## **EXECUTIVE SUMMARY**

Kidults, collectibles, and mobile-first gaming fuel growth in Indonesia

## KEY DATA FINDINGS

Chart 5 - Key Trends 2024

## INDUSTRY PERFORMANCE

Traditional toys and games drives growth within toys and games

Marvel and Transformers action figures gain from the kidult trend

Pokémon cards and Pop Mart blind boxes drive growth in collectibles in toys and games

Chart 6 - Pokémon Trading Cards Spark Cross-Generational Buzz in Indonesia

## WHAT'S NEXT?

Video games set to continue to dominate, and will also experience growth Kidult and collectibles trends will drive change in toys and games Education and the environment set to play important roles Addo and Playgro to gain traction through affordability and brand trust Retail e-commerce set to gain further traction in traditional toys and games

## COMPETITIVE LANDSCAPE

Mattel and Lego retain share amidst fragmentation and kidult growth Pop Mart and Addo gain traction through trends and retail strategies Brands which effectively use retail e-commerce perform well Hasbro launches colour mixer kit for STEM and art education

## **CHANNELS**

Blending offline and online channels

Addo leverages e-commerce to expand its reach

Miniso opens Sanrio flagship store to deepen consumer connections

Chart 7 - Analyst Insight

#### ECONOMIC CONTEXT

Chart 8 - Real GDP Growth and Inflation 2019-2029 Chart 9 - PEST Analysis in Indonesia 2024

## CONSUMER CONTEXT

Chart 10 - Key Insights on Consumers in Indonesia 2024 Chart 11 - Consumer Landscape in Indonesia 2024

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## **SOURCES**

Summary 1 - Research Sources

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