



Euromonitor
International

Traditional Toys and Games in South Korea

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Traditional Toys and Games in South Korea - Category analysis

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2024 DEVELOPMENTS

Despite overall decline, dolls and accessories benefits from kidults and collectibles trends

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Dolls and accessories experiences double-digit growth, driven by Catch Teenieping

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Pop Mart partnerships drive growth in collectibles

Chart 3 - Pop Mart Grows Collectibles Buzz with Disney and K-pop

Catch Teenieping IP drives growth across children's products through partnerships

WHAT'S NEXT?

Construction to drive overall sales, while companies will look to diversify with AI and tech innovations

Major focus on kidults amid ageing population and low birth rates

Retail e-commerce to attract cost-conscious consumers while gacha model may be hindered by potential regulations and concerns

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COMPETITIVE LANDSCAPE

Low concentration as LEGO Group retains lead while competitors make gains

Local company Young Toys gains ground by utilising intellectual properties

Aurora World acquires Mary Meyer to expand product range

CHANNELS

Retail e-commerce leads distribution, while hypermarkets loses ground

Experiential retail drives flagship and pop-up store expansion

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Toys and Games in South Korea - Industry Overview

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Collectibles, kidults and digital content help drive positive performance

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Gachapon trend expands, influencing marketing beyond toys and games

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Biglz uses AI to enhance toy customisation and engagement

DAY6's DENIMALZ merchandise leverages customisation to engage fans

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Video games to continue driving growth of toys and games

AI to drive development in toys and games

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Gacha marketing to gain further traction, but this will be more of a challenge for video games

Change to chat feature for Among Us alienates Generation Alpha

COMPETITIVE LANDSCAPE

Leader Nexon uses AI marketing, while Catch Teenieping gains notable share in dolls and accessories
Pikmin game resonates with millennials and Generation Z for providing enjoyment
Neptune diversifies via independent studio investment; Aurora World acquires Mary Meyer

CHANNELS

Retail e-commerce expansion driven by changing industry and pre-order systems
Gacha retail model helps to boost toys and games, while expanding across consumer goods

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