

# Traditional Toys and Games in Japan

June 2025

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#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Franchises such as Beyblade and Pokémon drive growth among kidults

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#### INDUSTRY PERFORMANCE

Beyblade X and card games drive growth in traditional toys and games

Sales of One Piece Card Game surge thanks to enduring popularity of the franchise

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Capsule toy vending machine stores continue to expand

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Games and puzzles set to remain the largest category, and see modest growth

Traditional toys and games will remain important; Gundam series to impact sales

The need to refresh established brands to sustain sales

## COMPETITIVE LANDSCAPE

Beyblade X launch drives greater concentration in action figures and accessories

BANDAI NAMCO expands plush sales with Sunrise Inc acquisition

Disney Lorcana card games demonstrate strong performance with dual appeal

Sumikkogurashi IP drives sales with live-streaming function for younger consumers

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Traditional toys and games stores still serve an important purpose

Manufacturers embrace direct-to-consumer sales via their own e-commerce sites

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Even inflation cannot stop growth for traditional toys and games, due to spending by kidults

## KEY DATA FINDINGS

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One Piece Card Game benefits from the kidult trend and popularity of the related comic

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Palworld's success on Steam faces controversy due to similarity with Pokémon

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# WHAT'S NEXT?

Video games will continue to lead toys and games, despite anticipation of modest growth Pokémon Trading Card Game app launch expected to also boost sales of its physical game Switch 2 launch in 2025 anticipated to perform well

Gundam likely to drive growth in traditional toys and games, but mobile games may face headwinds in video games

## COMPETITIVE LANDSCAPE

PlayStation loses its lead to Nintendo amid the changing preferences of gamers China-based games developers' marketing tactics drive success for mobile games IP partnerships impact brand rankings, with Sumikkogurashi PC performing well

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#### **CHANNELS**

Retail e-commerce is the leading sales channel and exhibits strong growth

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