

Toy Market in Japan: Key Research Findings 2014

◆ Research Outline

Yano Research Institute has conducted a study on the domestic market of toys and game contents with the following conditions:

1. Research period: From November, 2014 to January, 2015
2. Research targets: Manufacturers, wholesalers, and retailers of toys and game contents
3. Research methodologies: face-to-face interviews by the specialized researchers, survey via telephone, mail-in questionnaire, and literature research

<What is the Toy Market?>

The toy market in this research indicates a market that consists of the following nine items:

- 1) Electronic toys, 2) toys for building scale models/toys for hobbies, 3) boy characters & toys, 4) girl characters & toys, 5) analog games, 6) seasonal & miscellaneous toys, 7) basic toys (intellectual training toys, blocks, jigsaw puzzles, etc.), 8) soft or stuffed toys, and 9) TV games.

◆ Key Findings

■ **Domestic Toy Market (Major 9 Items) for FY2013 Shrank by 7.4% from Previous Fiscal Year to Mark 656.9 Billion Yen**

Size of the domestic toy market (major nine toy items) in FY 2013 scaled down by 7.4% from the previous fiscal year to mark 656.9 billion yen, based on the shipment value of manufacturers. The major declining factor is continuous sales slump of TV game software.

On the other hand, the both items of “toys for building scale models/toys for hobbies” and “girl characters & toys” were showing upward tendency, the former due to continued popularity of military-plane, self-defense-forces-related, and mini-4WD scale models, and the latter due to favorable sales of smartphone-imitated toys.

■ **Domestic Toy Market for FY2014 (Major 9 Items) Projected to Decline by 2.4% to Attain 641.4 Billion Yen, Whereas 8 Items Market (Without TV Games) to Grow by 5.2% to Achieve 332.4 Billion Yen**

Although the domestic toy market (major nine toy items) in FY 2014 is likely to be 641.4 billion yen, a decline by 2.4%, based on the shipment value of manufacturers, the domestic toy market of 8 items without TV games is expected to rise by 5.2% to attain 332.4 billion yen.

In spite of the decreasing tendency of TV games, both the boy characters & toys, and girl characters & toys are on the rise due to emerge of big-hit products. In addition, military-plane and self-defense-forces-related scale models, and popular characters of plastic models are expanding their sales. All of such factors are expected to boost the entire domestic toy market, narrowing down the shrink level of the 9-item market.

◆ Report format

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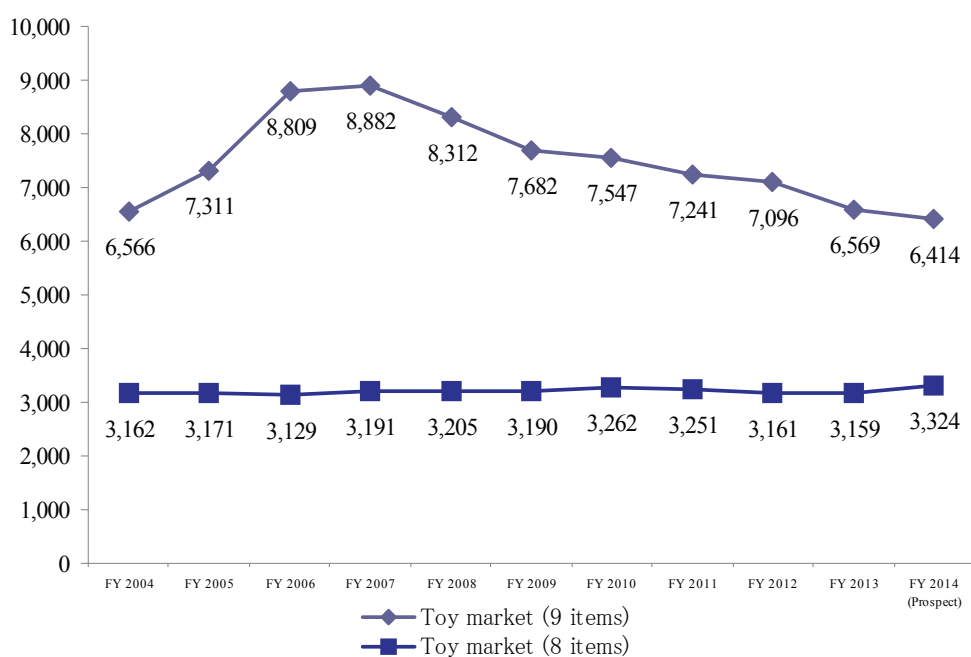
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■ Figure 1: Transition of Size of Domestic Toys Market



Notes:

1. The figures are based on the shipment values of manufacturers
2. Eight items of toys indicates “electronic toys”, “toys for building scale model/toys for hobbies”, “boy characters & toys”, “girl characters & toys”, “analog games”, “seasonal & miscellaneous toys”, “basic toys (intellectual training toys, blocks, jigsaw puzzles, etc.)”, and “soft or stuffed toys”. Nine items indicates the above eight items plus “TV games”.

■ **Table 1: Transition of Size of Toys Market for Nine Items**

(Hundred million yen, Upper row: Y-o-Y Lower row: Distribution ratio)

	FY 2012		FY 2013		FY 2014 (Prospects)	
		%		%		%
Electronic toys	404	95.0 5.7	393	97.3 6.0	393	100.0 6.1
Toys for building scale models/Toys for hobbies	464	100.4 6.2	485	104.5 7.4	506	104.3 7.9
Toys for boys	976	99.8 14.6	943	96.6 14.4	1,070	113.5 16.7
Toys for girls	265	108.0 3.7	294	110.9 4.5	310	105.4 4.8
Games (analog games)	120	102.5 1.7	119	99.2 1.8	117	98.3 1.8
Seasonal & miscellaneous toys	290	92.9 3.9	288	99.3 4.4	280	97.2 4.4
Basic toys	528	102.5 7.4	524	99.2 8.0	530	101.1 8.3
Intellectual training toys and toys for infants	460	103.4 6.3	470	102.2 7.2	480	102.1 7.5
Jigsaw puzzles	68	97.6 1.1	54	79.4 0.8	50	92.6 0.8
soft or stuffed toys	114	97.3 1.5	113	99.1 1.7	118	104.4 1.8
TV games	3,935	93.1 55.1	3,410	86.7 51.9	3,090	90.6 48.2
Total	7,096	59.9 100.0	6,569	92.6 100.0	6,414	97.6 100.0

Note:

- The figures are based on the shipment values of manufacturers.
- Since some of the figures are rounded, some ratio may not match.
- Please see Reference in the next page on details of each item.

■ **Table 2: Transition of Size of Toys Market by Attention-Getting Item**

(Hundred million yen, Y-o-Y)

	FY 2012		FY 2013		FY 2014 (Prospects)	
		%		%		%
High-targeted toys	879	100.9	897	102.0	923	102.9
Trading card games	456	125.2	393	86.2	400	101.8
Toys packaged with confectioneries	476	100.4	501	105.3	522	104.2
Toys in capsules	198	105.3	200	101.0	212	106.0
Figure toys	310	104.8	311	100.3	320	102.9

Notes:

- “High targeted toys” indicate overall toys that target adults. They are included in each of major eight items, except for “TV games”.
- “Trading card games” are included in “toys for boys” or “games (analog games)”.
- “Toys packaged with confectioneries,” “Toys in capsules,” and “Figure toys” are not included in the targets of this research, but their market size are calculated separately in the report as noteworthy topics.
- Some parts of the market size has been reviewed retroactively.

■ **Reference:**

Category	Products included in each category
1. Electronic toys	Electronic games, electronic soft toys, PC for kids, cenesthetic games (high-targeted toys included)
2. Toys for building scale models	Plastic models, radio control models, model guns, other toys for hobbies (high-targeted toys included)
3. Toys for boys, boy-character toys	Boy-character toys, toy radio controls, other toys for boys (most of trading card games and high-targeted toys included, among all the smartphone-imitated toys, those featured with characters are included)
4. Toys for girls, girl-character toys	Girl-character toys, dress-up dolls, other toys for girls (high-targeted toys included, and among all the smartphone-imitated toys, those featured with characters are included)
5. Games (analog)	Board games, analog games, general games (some trading card games and high-targeted toys included)
6. Seasonal & miscellaneous toys	Dolls and toys for seasonal or traditional festivals, fireworks, and other toys
7. Basic toys	Intellectual training toys, toys for babies and infants, blocks, toy vehicles, jigsaw puzzles etc (high-targeted toys included)
8. Soft toys	Soft toys or stuffed toys, dolls and others (high-targeted toys included)
9. TV games	TV game hardware, mobile game devices, TV game software (some online games included)