

Toy Market in Japan: Key Research Findings 2016

◆ **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 October to December, 2016
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) in FY2015 Scaled Down by 1.3% on Y-o-Y Basis to Mark 640.7 Billion Yen**

Size of the domestic toy market (total nine toy items) in FY2015 shrank by 1.3% from the previous fiscal year to record 640.7 billion yen, based on the shipment value at manufacturers. However, the toy market of total eight items excluding TV games rose by 1.3% to attain 346.7 billion yen.

The major factor for the toy market of total nine items to decline is the continuous slump in the sales of TV game software used exclusively for TV game consoles. Despite that the momentum of great-hit characters having quietened down, the toy market of total eight items showed stable growth, supported by the steady sales of regular items.

■ **Domestic Toy Market for FY2016 (Major 9 Items) Projected to Decline by 0.7% on Y-o-Y Basis to 636.4 Billion Yen, Whereas 8 Items Market (Without TV Games) to Rise by 1.4% to 351.4 Billion Yen**

The FY2016 domestic toy market (major nine toy items) is projected to decline by 0.7% from the previous fiscal year to end up as 636.4 billion yen, based on the shipment value at manufacturers, whereas the domestic toy market of eight items without TV games is expected to rise by 1.4% from the previous fiscal year to attain 351.4 billion yen.

Because TV games are the only items within the nine items that suffer from decreasing tendency, the domestic toy market of total eight items without TV games are expected to expand, encouraged by the continuous tendency of consumers in general favoring for regular products.

◆ Report Format

Published report: “Toy Industry 2017”

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Price: 120,000 yen (Consumption tax shall be additionally charged for the sales in Japan.)

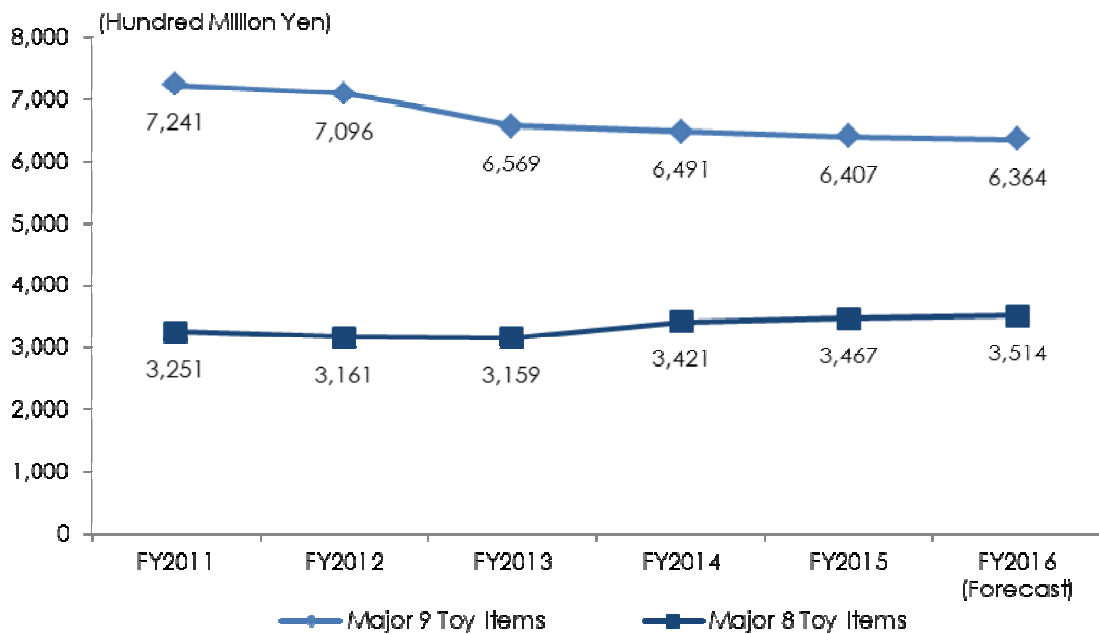
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■ **Figure 1: Transition of Size of Domestic Toy Market**



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Notes:

1. The market size is based on the shipment value at 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 Toy Market for Nine Items**

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

Major Nine Toy Items	FY2014	Y-o-Y	FY2015	Y-o-Y	FY2016 (Forecast)	Y-o-Y
		Component Ratio		Component Ratio		Component Ratio
① Electronic toys	394	100.3%	403	102.3%	413	102.5%
		6.1%		6.3%		6.5%
② Toys for building scale models/Toys for hobbies	515	106.2%	535	103.9%	544	101.7%
		7.9%		8.4%		8.5%
③ Boy characters & toys	1,140	120.9%	1,080	94.7%	1,090	100.9%
		17.6%		16.9%		17.1%
④ Girl characters & toys	317	107.8%	344	108.5%	356	103.5%
		4.9%		5.4%		5.6%
⑤ Games (analog games)	115	96.6%	125	108.7%	122	97.6%
		1.8%		2.0%		1.9%
⑥ Seasonal & miscellaneous toys	277	96.2%	272	98.2%	270	99.3%
		4.3%		4.2%		4.2%
⑦ Basic toys	544	103.8%	599	110.1%	605	101.0%
		8.4%		9.3%		9.5%
Intellectual training toys and toys for infants	490	104.3%	550	112.2%	560	101.8%
		7.5%		8.6%		8.8%
Jigsaw puzzles	54	100.0%	49	90.7%	45	91.8%
		0.8%		0.8%		0.7%
⑧ Soft or stuffed toys	119	105.3%	109	91.6%	114	104.6%
		1.8%		1.7%		1.8%
⑨ TV games	3,070	90.0%	2,940	95.8%	2,850	96.9%
		47.3%		45.9%		44.8%
Total Toy Market With Major 9 Items)	6,491	98.8%	6,407	98.7%	6,364	99.3%
		100.0%		100.0%		100.0%

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Note:

- The market size is based on the shipment value at manufacturers.
- Please see Reference in the next page on details of each item.

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

(Hundred Million Yen)

	FY2014	FY2015	Y-o-Y Comparison	FY2016 (Forecast)	Y-o-Y Comparison
High-targeted toys	941	974	103.5%	978	100.4%
Trading card games	398	415	104.3%	422	101.7%
Toys packaged with confectioneries	450	430	95.6%	440	102.3%
Toys in capsules	214	209	97.7%	211	101.0%
Figures	316	320	101.3%	320	100.0%

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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.

■ **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 festiv als, fireworks, and other toys
7. Basic toys	Intellectual training toys, toys for babies and infants, blocks, toy v ehicles, 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 dev ices, TV game software (some online games included)

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