



Global Toy Trends

Prepared for ICTI

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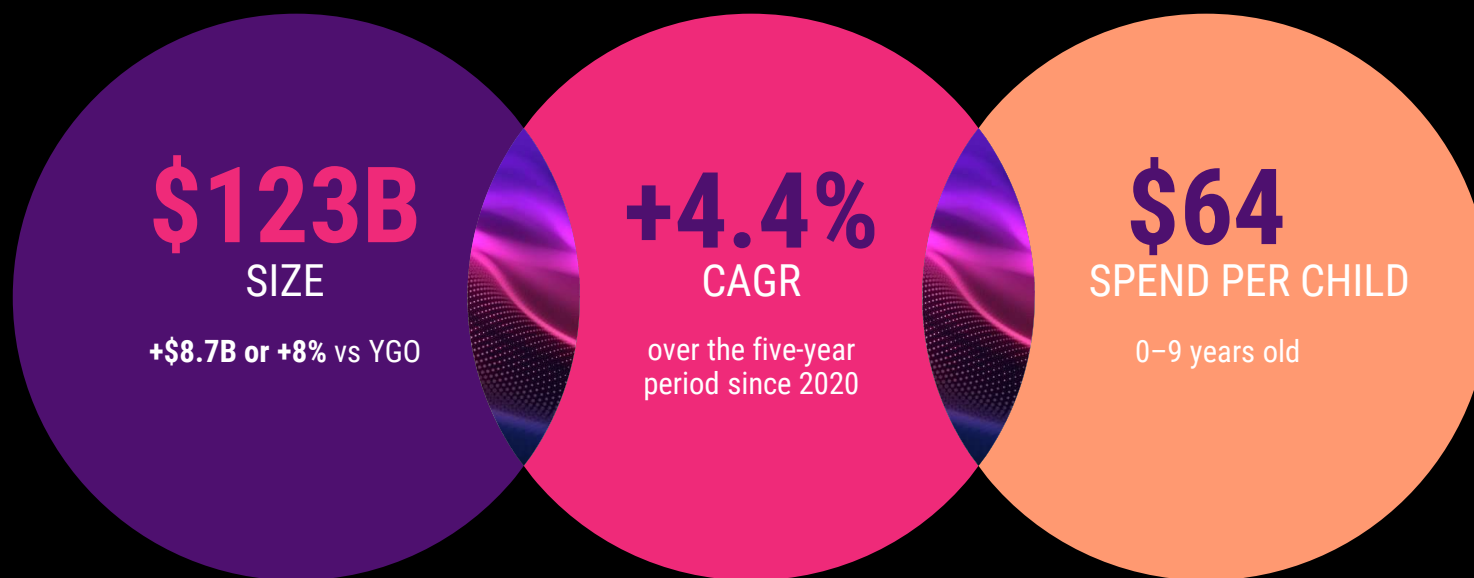


01

2025 Global
toy report

2025 — Key findings

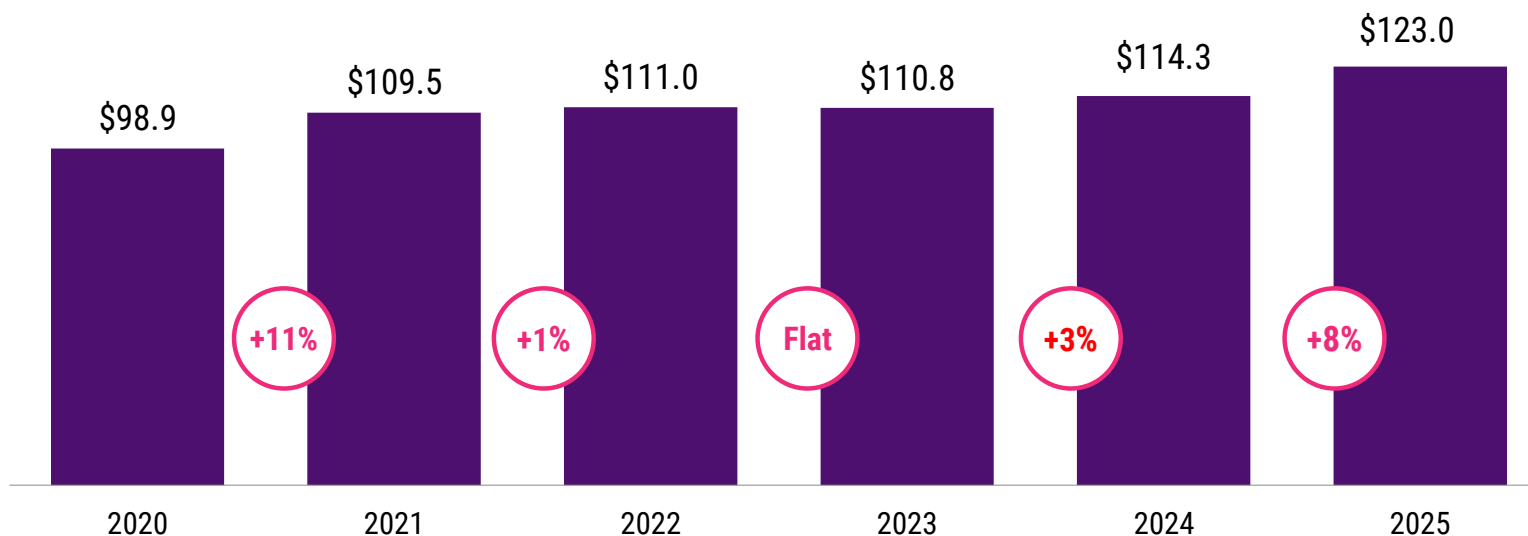
The global toy market has been growing by 4.4% on average since 2020.



Global market size

Growth accelerated in 2025, up 8% YoY, pushing the 5-year-comparison to +24%

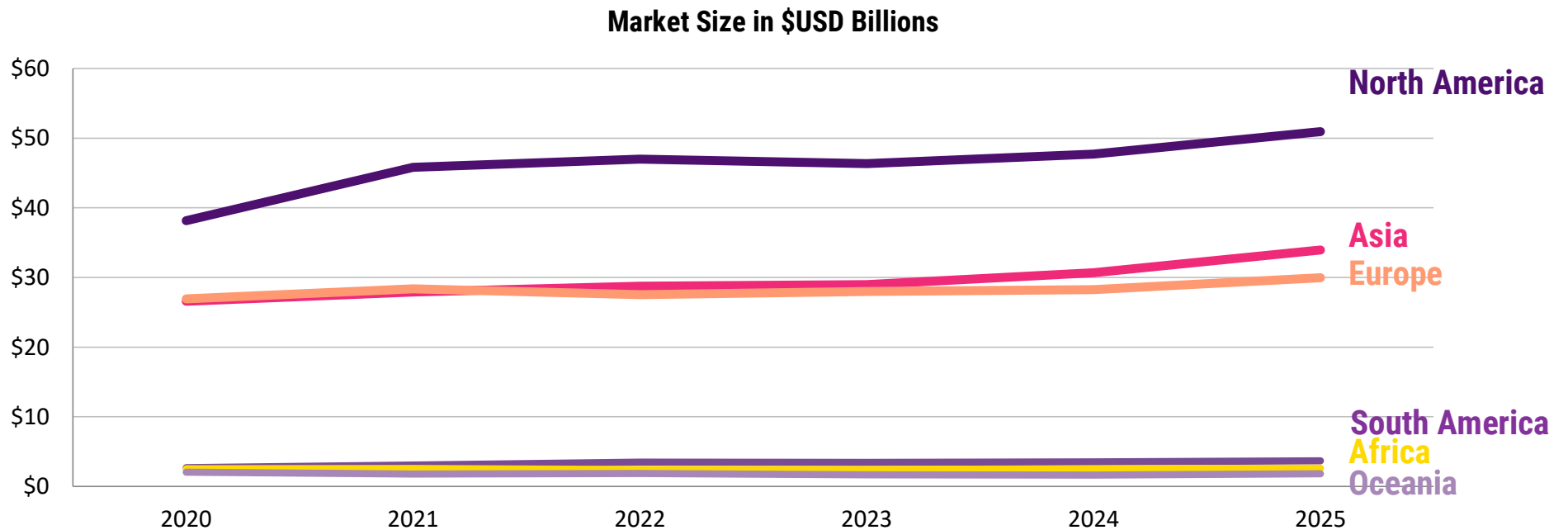
Global Toy Market Size in \$USD Billions




CAGR
+4%

Market size by region over time

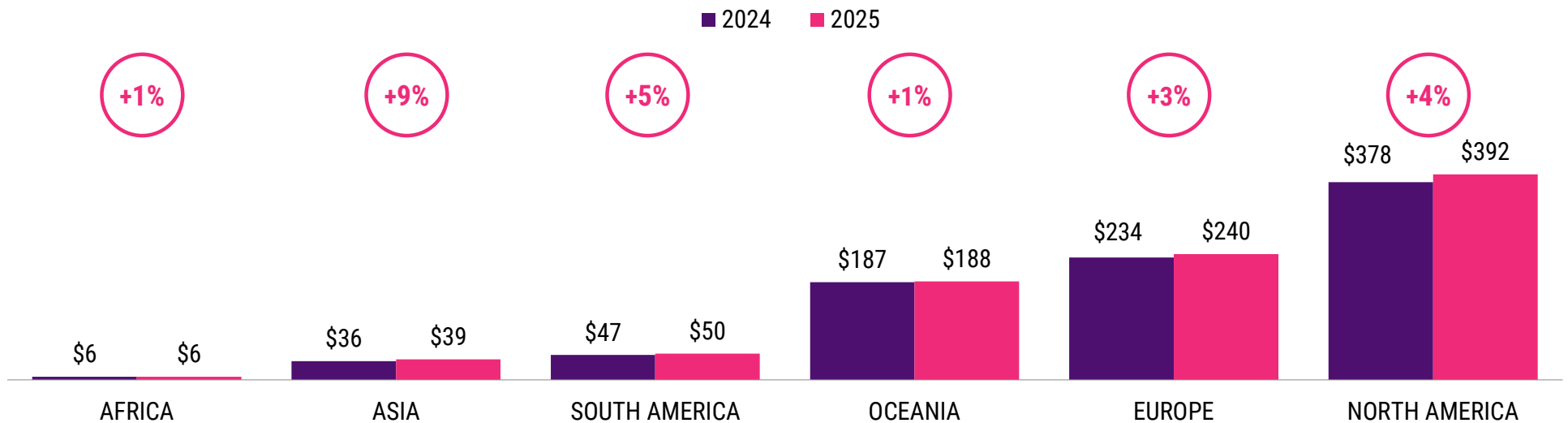
Asia has grown much faster than Europe over the last 2 years and is now 13% larger in 2025



Average annual spend per child per region

Spend per child is growing across all regions with fastest growth in Asia

Annual Spend per Child in \$USD (0–9 years)

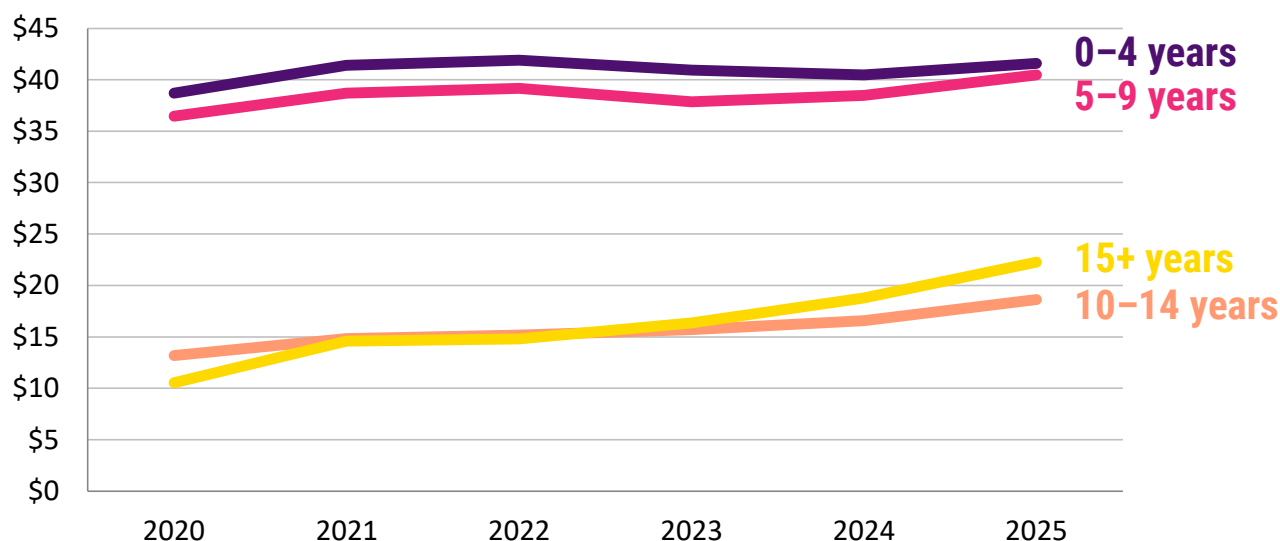


*Includes Caribbean, Iceland, Greenland

Market size by age group over time

Kids younger than age five are the largest group, but they have had the lowest CAGR increase over the last five years. Kids aged 15+ have increased sales by 111% since 2020 and overtaken the 10–14 age group.

Market Size in \$USD Billions



CAGR 2025 vs. 2020	% Chg 2025 vs. 2020	% Chg 2025 vs. 2024
1%	7%	3%
2%	11%	5%
16%	111%	19%
7%	41%	12%



02

2026
performance
to date

IMF World Economic outlook

“2025 ended on an **upbeat** note despite major trade disruptions and policy uncertainty.

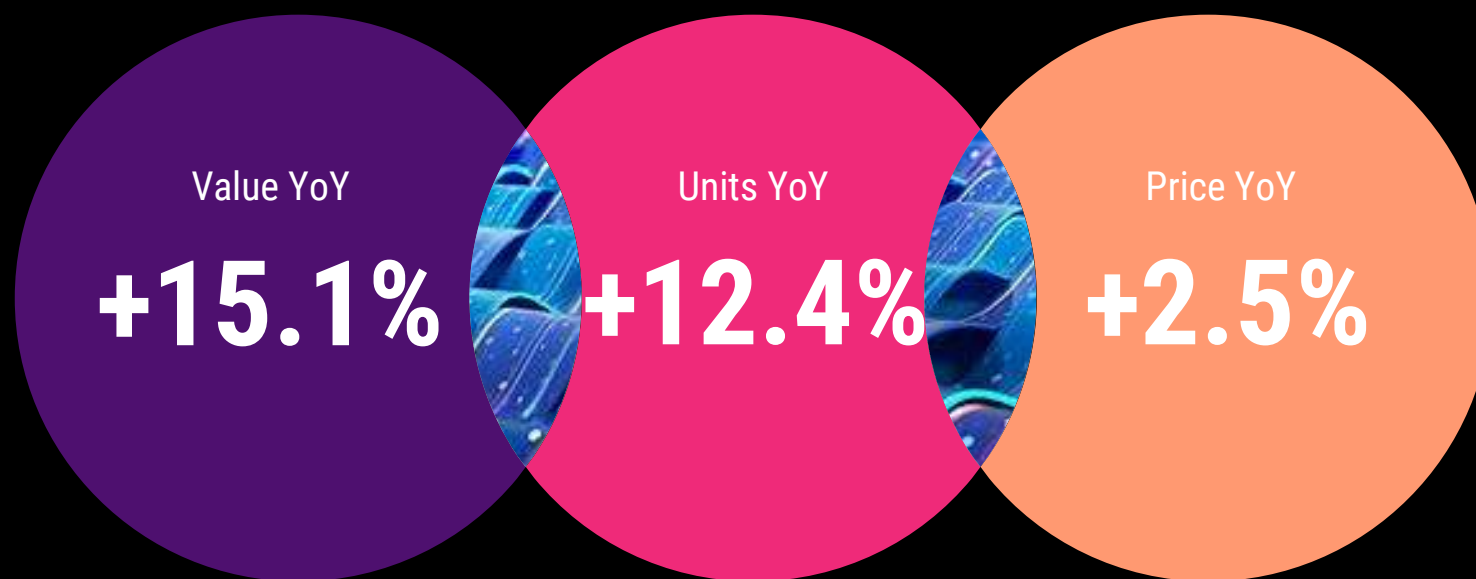
The private sector **adapted** to a changing business environment, helped by lower-than-announced U.S. tariffs, fiscal support in some countries, favorable financial conditions, and a tech boom.”

2026 3 scenarios:

- ① **Reference forecast:** energy prices +19%, global growth +3.1%, inflation 4.4%
- ② **Adverse:** global growth 2.5%, inflation 5.4%
- ③ **Severe:** continuing into 2027, global growth 2%, inflation 6%

G12 – Toy & Games Sales in Q1'26

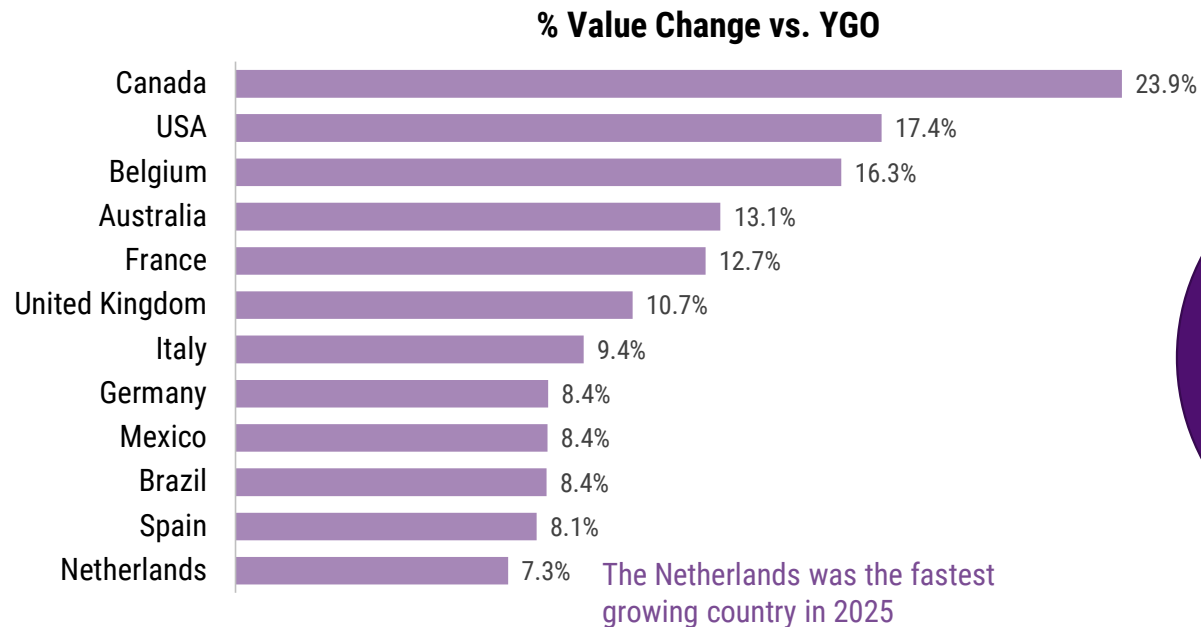
G12 market sales were worth \$15.5B in 2026 for 1.2 billion toys



G12 – First quarter 2026

Sales are increasing in all countries

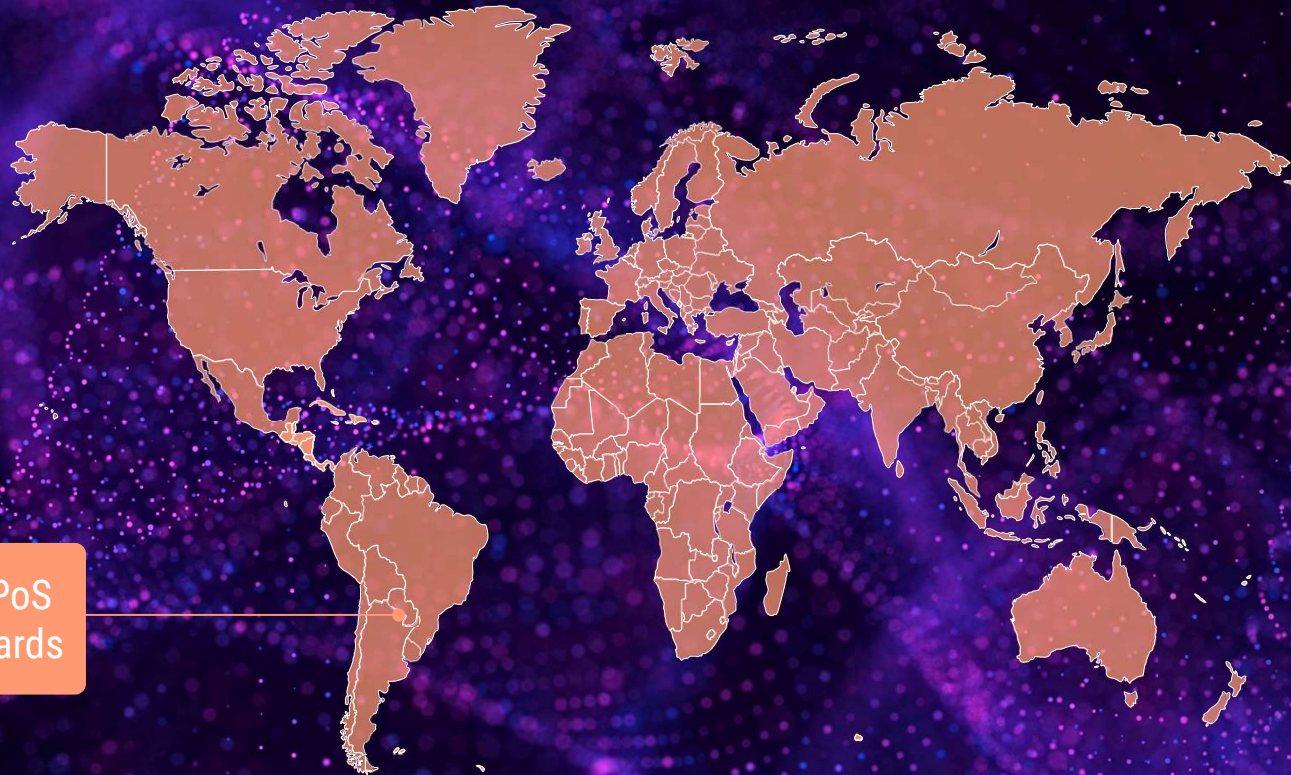
Trends from last year are continuing despite Middle East crisis and multiple disruptions



80%

Circana G12 countries +
China eCommerce cover
~80% of global toy sales

+ Chile & Peru PoS
from June onwards



2025 & Q1'26 Growth engines: The Joy Factor

Consumers crave affordable, inspiring entertainment with an emotional connection

01

LICENCES

+22%

38% of \$ sales
in Q1'26

02

COLLECTIBLES

+27%

25% of \$ sales
in Q1'26

03

AGES 12+

+16%*

32% of \$ sales
in 2025

04

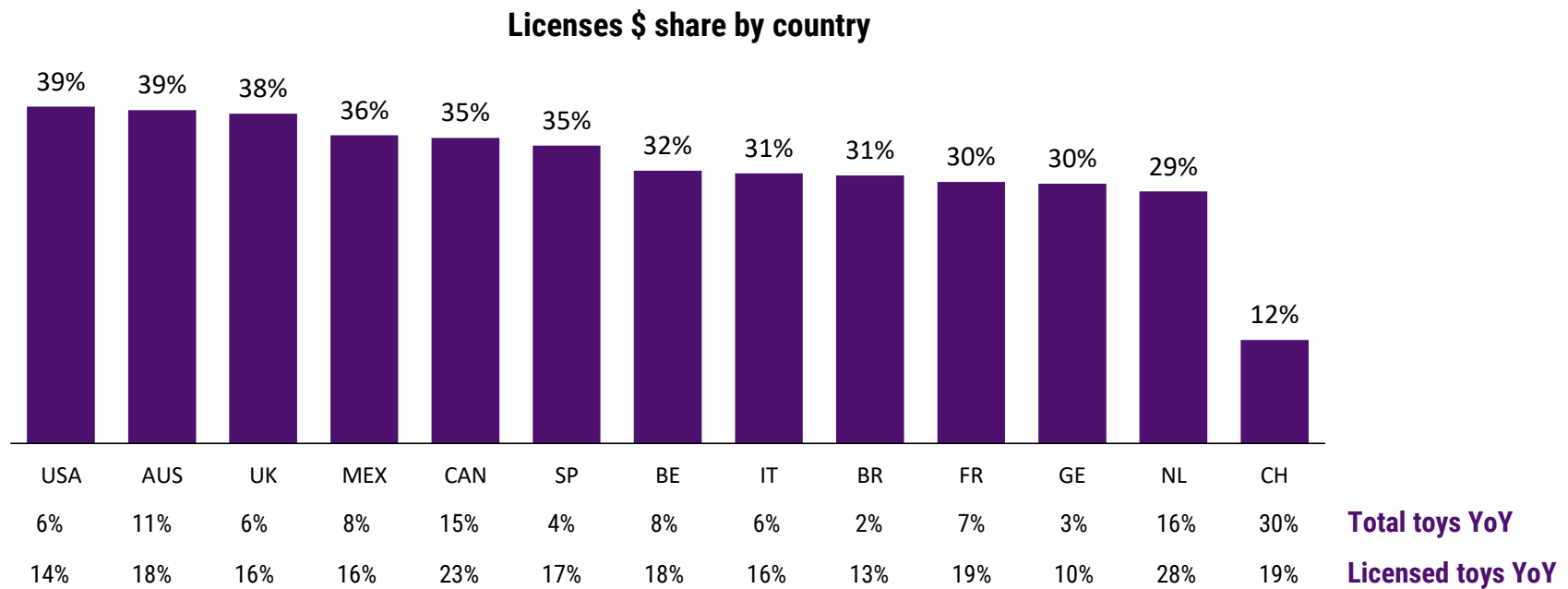
OCCASIONS

U.S. Micro **+9%***
EU5 No occasion **+10%**
in 2025

Source Circana Retail Tracking Service USD Projected & Adjusted, G12, Annual 2025 * U.S. Checkout & EU5 TC360

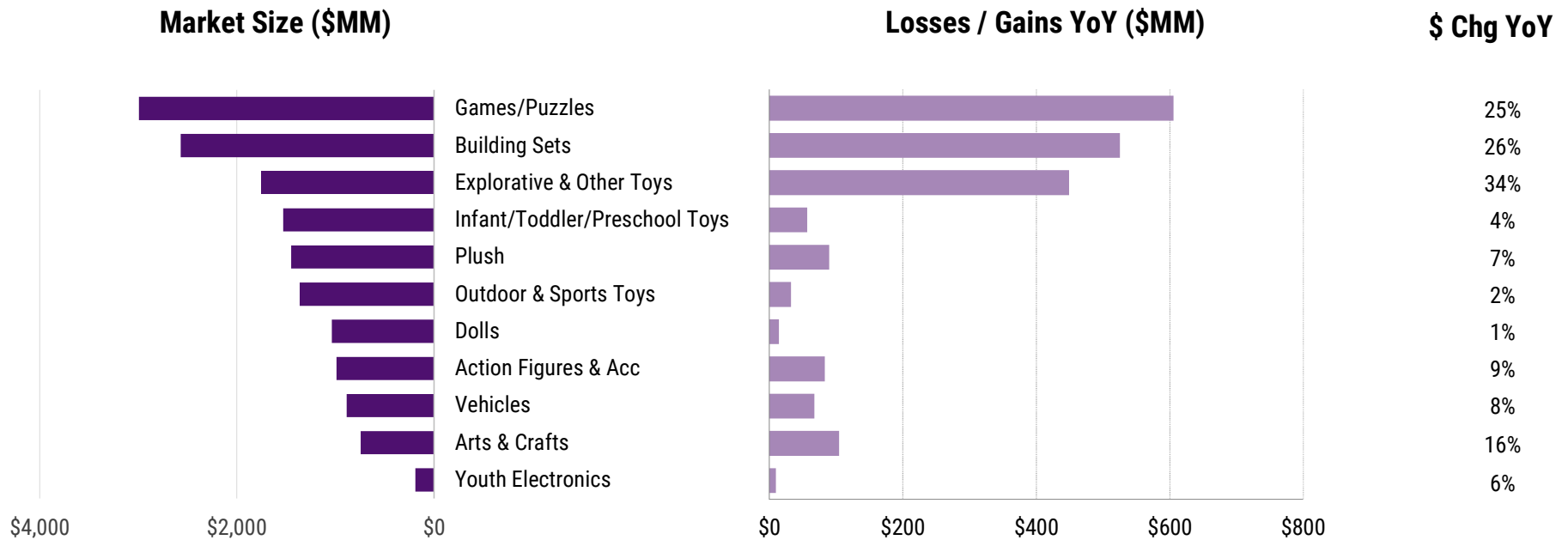
2025 – Licensed toys share by country

In all countries but China, licensed toy sales out-paced the market.



G12 – Performance by Super Category in Q1'26

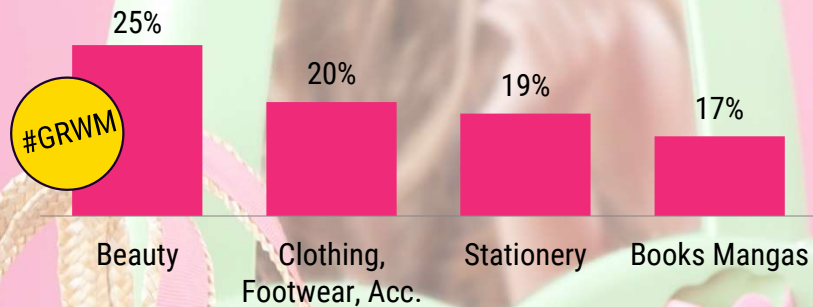
11/11 Super Categories in growth



EU5 – Have Toys lost relevance with girls?

What could make girls come back?

EU5 – If you spent less on toys for a girl in 2025, which category did you spend more on?



Source Circana Consumer Sentiment Survey, EU5, Jan'26 N=1224

Circana, LLC | Proprietary and confidential

G12 – Top gaining subclasses in Q1'26

Collection is the common denominator between winning categories

Ranked in \$ gains



+42%

Strategic Trading Card Games



+26%

Standard Building Sets



+70%

Miscellaneous



+28%

Non-Strategic Cards & Stickers



+8%

Traditional Plush

G12 – Top gaining manufacturers in Q1'26

The LEGO Group keeps its #1 position, up 26% at the end of first quarter



Trends



Eight interwoven trend themes for 2026

Consumers will be drawn towards products which embodies one or more of these overarching themes.



Experiences

People are craving fulfilling **IRL** experiences with connection



Joy

Escape & light-hearted fun sparking optimism



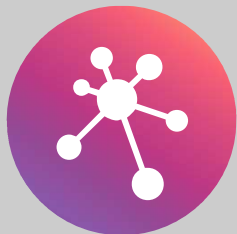
Affordability

Good value. A top consideration at every level



Necessity

Pragmatic decisions and weighing priorities



Creativity

Personalize, create, & express individuality



Fanship

& connection
Self-Expression as member of a chosen group



Collectability

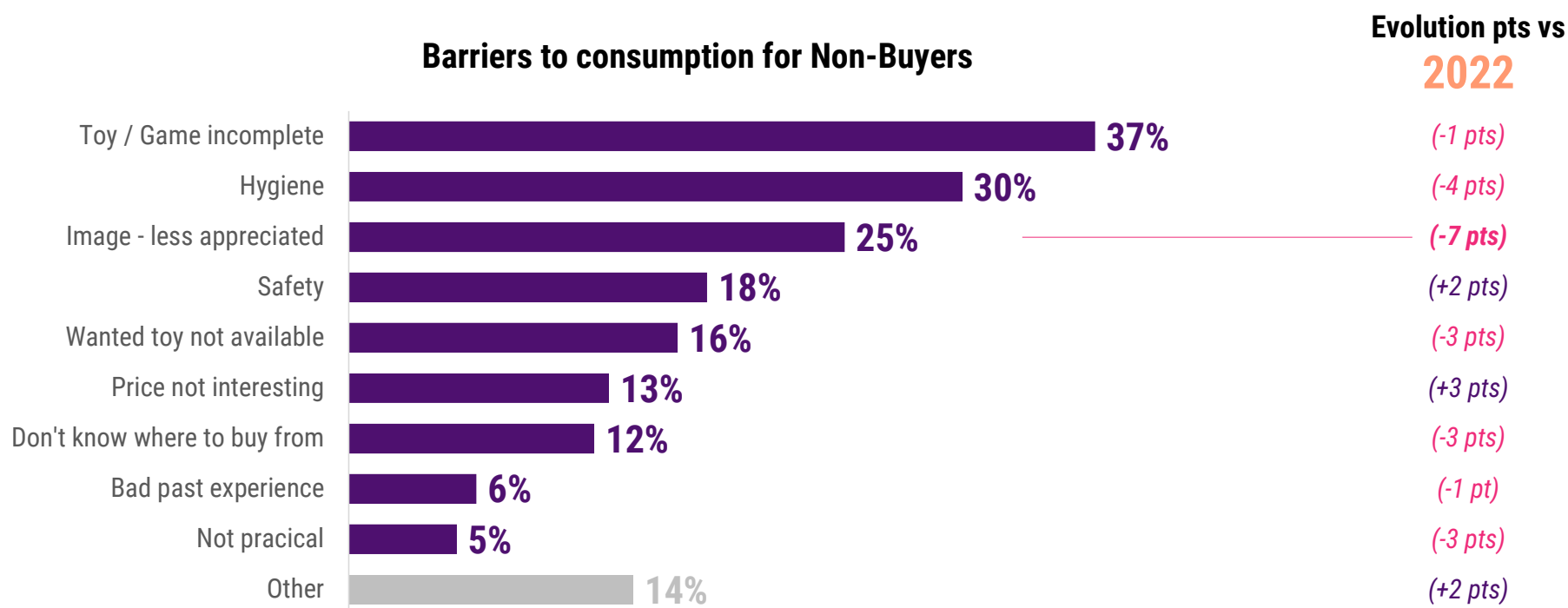
For fun, and for profit. Uplifting categories aligning with lifestyle



Retail reinvention

New players, paths, and strategies

France – Consumer perception of second-hand toys is changing



Trend: Families re-thinking relationship to tech



Mental health
Educational performance
Social & emotional growth
Screen addiction
Privacy

Social media bans
Phone-free school districts
Lawsuits against social media
Consumer anger toward Big Tech

U.S. – Learning benefits fuel interest in AI toys

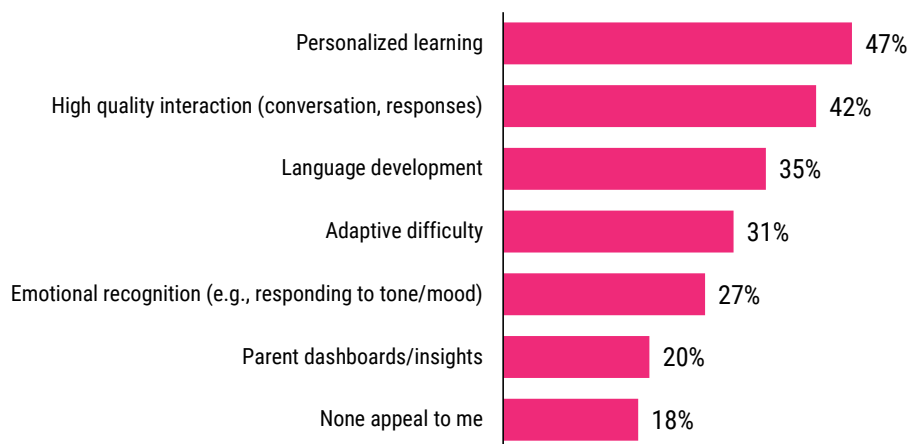
Appeal is driven by personalized learning, while those who are uncomfortable are primarily concerned with reduced human interaction and privacy.



Which features of AI/tech-enabled toys appeal to you?

(% among those comfortable with toys that use AI/tech to personalize or adapt play)

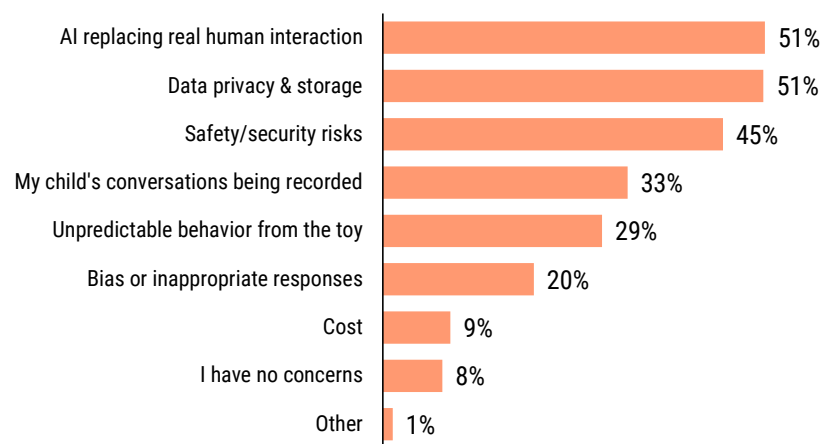
74% of U.S. consumers are comfortable with toys that use AI/tech to personalize or adapt play



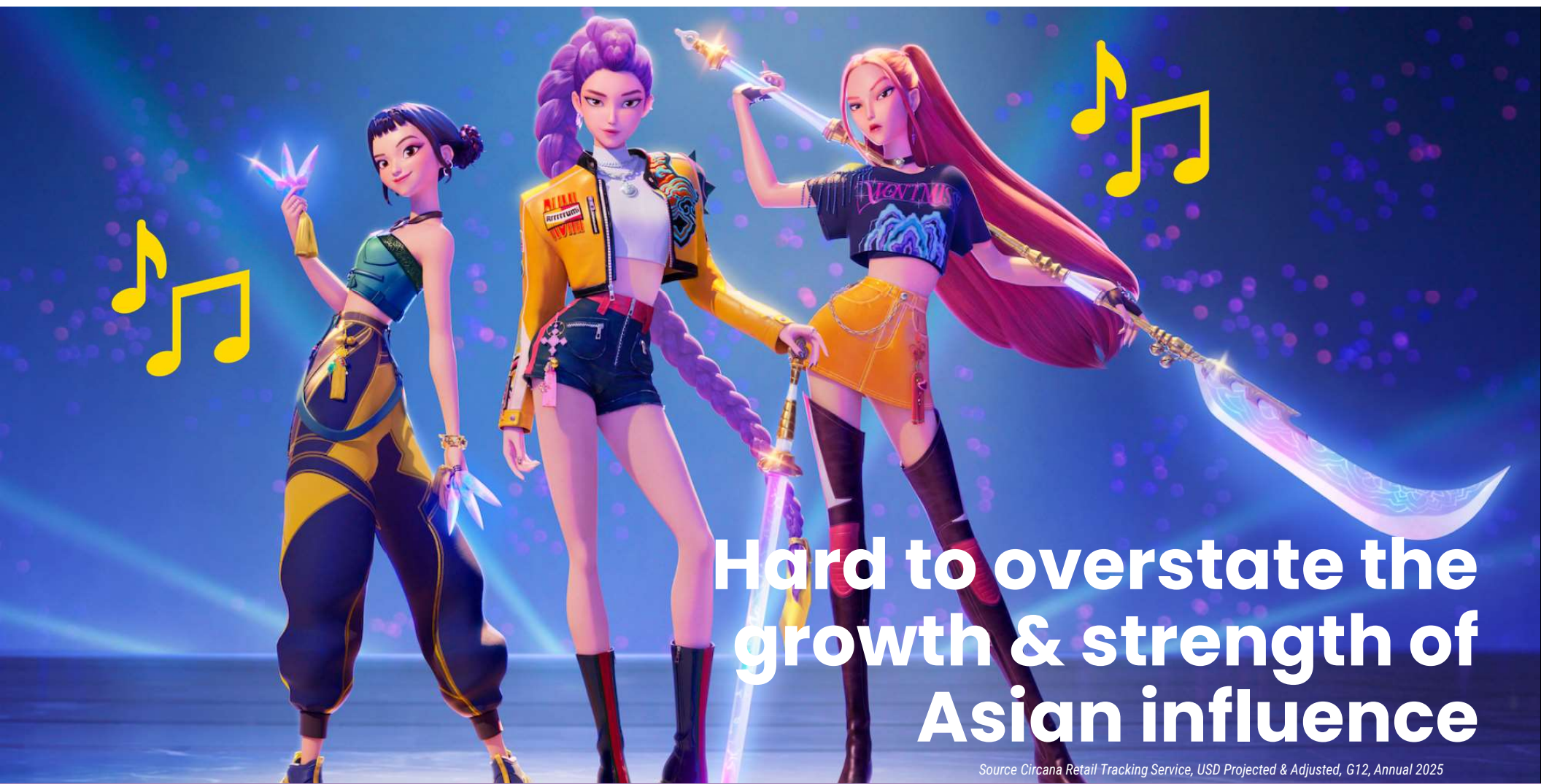
Which aspects of AI/tech in toys concern you the most?

(% among those uncomfortable with toys that use AI/tech to personalize or adapt play)

26% of U.S. consumers are uncomfortable with toys that use AI/tech to personalize or adapt play



Source: Circana, Omnibus Survey, March 2026
Q: Which features of AI/tech-enabled toys appeal to you? Base: Comfortable with toys that use AI/tech to personalize or adapt play, N=744
Q: Which aspects of AI/tech in toys concern you the most? Base: Uncomfortable with toys that use AI/tech to personalize or adapt play N=259



Hard to overstate the growth & strength of Asian influence

Source Circana Retail Tracking Service, USD Projected & Adjusted, G12, Annual 2025

Girls will be back!

Asian product trends growing this year

Kidult culture is very strong and buoyant in Asia



Book Nooks

e.g. Robotime
or 3D metal models (Piececool)



Paper Theaters

Or Kamishibai
Creative BIY craft



Dolls & Figures

TOMY, Bandai & Epoch bring
successful product trends from Japan
TOMY Momiji message dolls



Pins & Non-Strat TCG

Kayou arrives in the U.S.
Key manufacturer in China
Funko launches blind pins

New collectible trends: cross-Gen wearables

Inspired by the Labubu craze: **Keychain toys \$380M, +61% YTD Mar'26**

Vinyl Plush



Pins & Badges



Handheld Games



Gui Gui Mini



Micro bags



Beauty



Robotic Pets

Bag charms: Barbie
Coachella activation





U.S. – Social media influences consumer spend

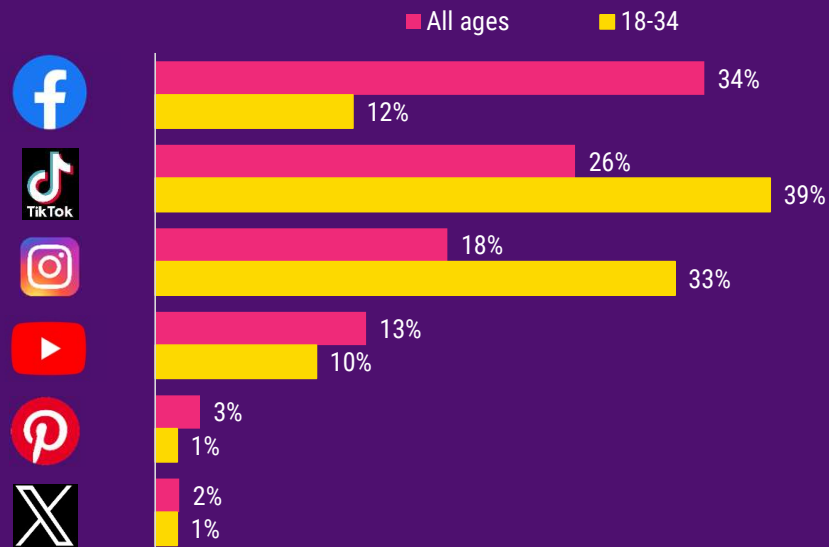
Facebook was the top platform for purchasing items among all age groups, but TikTok and Instagram ranked as the top platforms resulting in a purchase among those 18-34.

62%

of consumers **made a purchase** of something because of seeing it on **social media** - higher among younger consumers
(75% of 18-44 year old)



On which platform did you see the item you purchased?²



Source: Circana Omnibus Survey, March 2026

Q: Have you ever made a purchase of anything as a result of seeing it on social media? Base: 1003

²Q: Which social media platform (if more than one, use the latest purchase made) did you see the product that resulted in your purchase? (excludes: Other) Base: Purchased as a result of seeing it on social media, 626

³Q: Where did you buy the item (if more than one, use the latest purchase made)? Base: Purchased as a result of seeing it on social media, 626

In-store experience

Customization 'bar', vending machines: from FAO Schwartz to Drm-Ind or King'Dultes, in-store experience is getting more exciting



↑ Rocco Giocattoli

↓ FAO Schwartz

→ King'Dultes



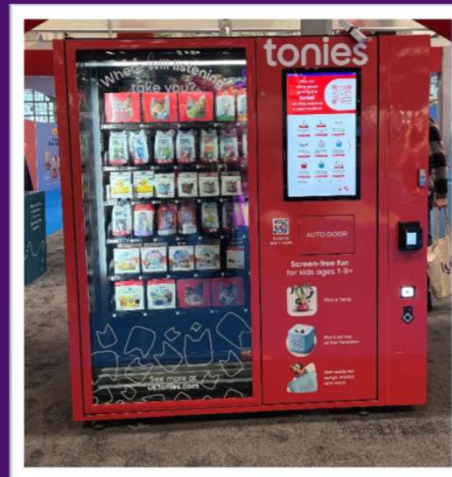
TCG & Collectibles

In-store & in-mall experience

Recent development/comeback of vending machines.



Gashapon Paris – Bandai X King Jouet



Pop Mart roboshops now in 13 stores The Entertainer (UK)



Thank you

