



Euromonitor
International

Traditional Toys and Games in the United Kingdom

June 2025

KEY DATA INSIGHTS

2024 DEVELOPMENTS

Expanding kidult audience helps drive sales of nostalgic collectibles

Chart 1 - Key Trends 2024

INDUSTRY PERFORMANCE

Positive growth overall, with plush a particularly dynamic performer

Lego targets kidults with expanded Botanicals Collection and boosts collectibles

Chart 2 - Analyst Insight

Funko's Bitty Pop! range drives collectibles sales with focus on nostalgia

Chart 3 - Funko Expands Bitty Pop! Range

WHAT'S NEXT?

Construction and plush to remain strong performers, while scientific/educational is set to record most dynamic growth

Sustainability set to transform development of traditional toys and games

Retail e-commerce to make further gains, placing pressure on retail offline

COMPETITIVE LANDSCAPE

Lego gains share as Mattel and Hasbro pivot to collectibles

Spin Master's latest acquisition enables it to expand presence in category

Addition of Blind Barbie to Barbie Fashionistas range aligns with inclusivity trend

CHANNELS

Retail e-commerce gains share as toys and games stores loses ground

Investment in Hobbycraft set to help drive sales of arts and crafts

Liledu uses subscription model to enter traditional toys and games

Chart 4 - Liledu Launches in the UK

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Toys and Games in the United Kingdom - Industry Overview

EXECUTIVE SUMMARY

Growth driven by kidult trend, sustainability and influence of strategic alliances

KEY DATA INSIGHTS

Chart 5 - Key Trends 2024

INDUSTRY PERFORMANCE

Traditional toys and games records most rapid value growth

Lego expands Botanicals range, targeting kidults with complex construction sets

Chart 6 - Lego Expands Botanicals Collection

Disney and Epic Games partnership extends media influence in Fortnite

Chart 7 - Disney Collaborates with Epic Games to Create Fortnite Universe

WHAT'S NEXT?

Video games to spearhead growth in toys and games

Kidults and tech integration to influence development of traditional toys and games

Sustainability to be a major trend in local market moving forwards

Chart 8 - Analyst Insight

Dominance of retail e-commerce to support greater uptake of subscription services

COMPETITIVE LANDSCAPE

LEGO Group gains share as Mattel and Hasbro focus on collectibles
Independent games struggle to compete with AAA titles due to limited funding
New range of LOL Surprise! dolls fails to appeal to younger children
Mattel's ongoing commitment to supporting diversity and inclusion

CHANNELS

Retail e-commerce continues to dominate, while traditional toy shops decline
Currys partners with Microsoft for Xbox repairs
Liledu enters subscription services with play-and-swap model
Chart 9 - Liledu Launches in the UK

ECONOMIC CONTEXT

Chart 10 - Real GDP Growth and Inflation 2019-2029
Chart 11 - PEST Analysis in the United Kingdom 2024

CONSUMER CONTEXT

Chart 12 - Key Insights on Consumers in the United Kingdom 2024
Chart 13 - Consumer Landscape in the United Kingdom 2024

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