

KIDULTS: A MARKET FULL OF POTENTIAL

The toy market for consumers aged 12+



USA



\$13.4B spent on toys

U.S. consumers spent \$13.4B on toys for recipients aged 12 or more from October 2024 to September 2025.



+12% YOY

This is a 12% increase year over year (YOY), meaning compared to the same period the year before.



30.2% of all toy sales

They now make up 30.2% of all toy sales.



EU5



€5.7B spent on toys

EU5 (Germany, GB, Italy, Spain & France) consumers spent €5.7B on toys for recipients aged 12 or more from October 2024 to September 2025.



+14% YOY

This is a 14% increase year over year (YOY), meaning compared to the same period the year before.



32% of all toy sales

They now make up 32% of all toy sales.

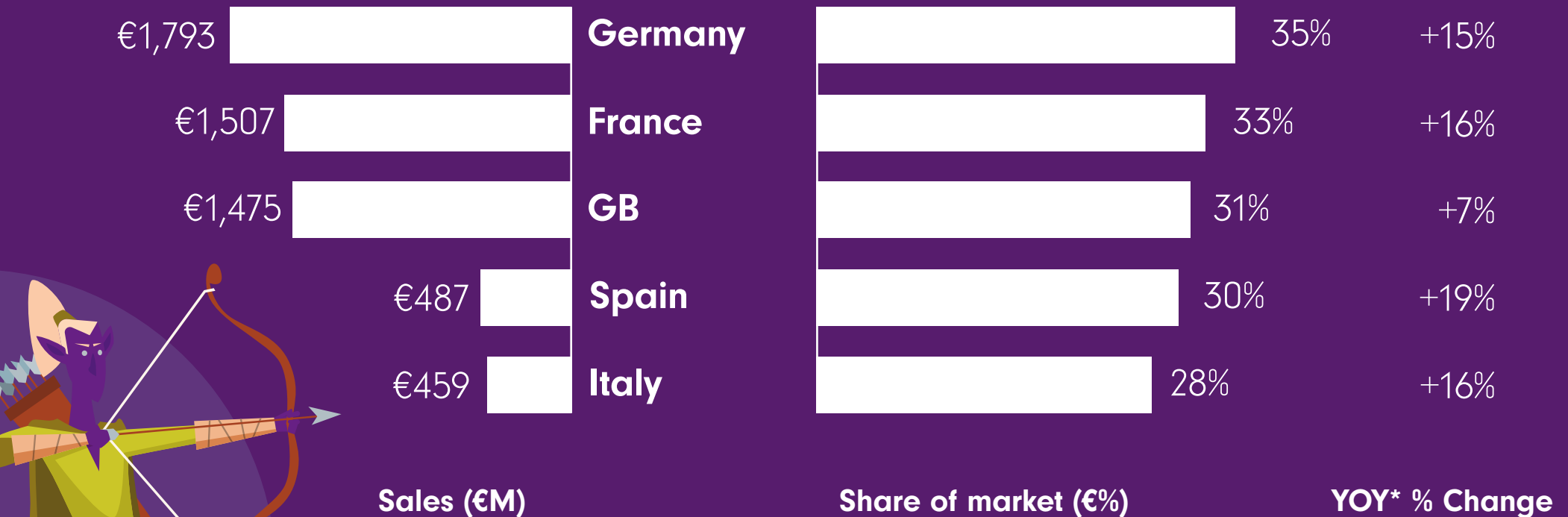
Data based on Circana consumer panel data in each country, focusing on toy purchases by people aged 16 and older for recipients aged 12+. Survey period: last 12 months, ending September 2025.

Source: Circana, U.S. Checkout & TC360 (EU5), © Circana, LLC. All rights reserved.

EU 5 - RECIPIENTS AGED 12+ - SIZE BY COUNTRY

All countries recorded sales **increase** in the **last 12 months** to September 2025.

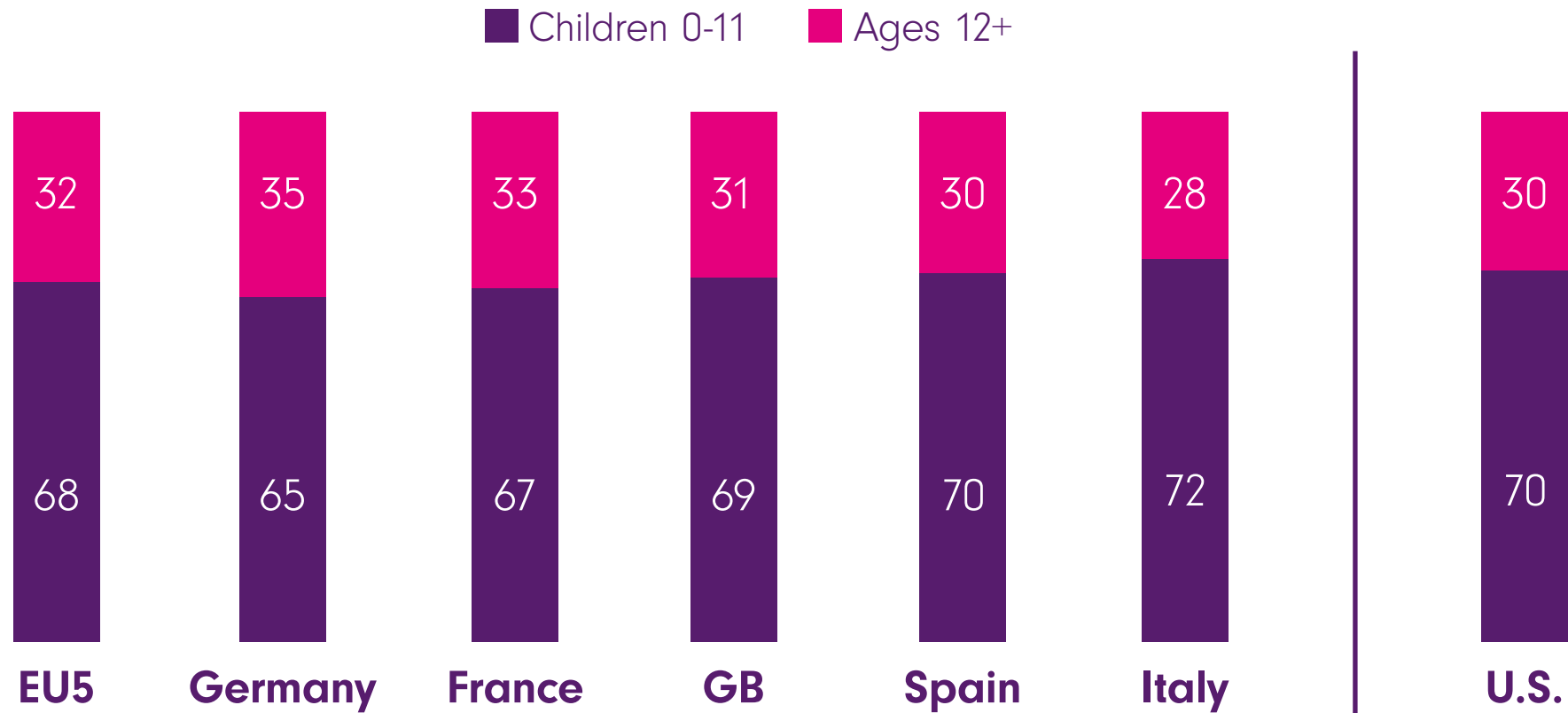
Germany has the **highest share** of sales made with Kidults (12+) with **35%**, and is also the largest market.



* YOY = Year-over-Year, increase compared to the same period the year before.

STRUCTURE OF SALES BY AGE GROUP BY COUNTRY

Recipients aged 12+ represent between 28% (Italy) and 35% (Germany) of toy sales.

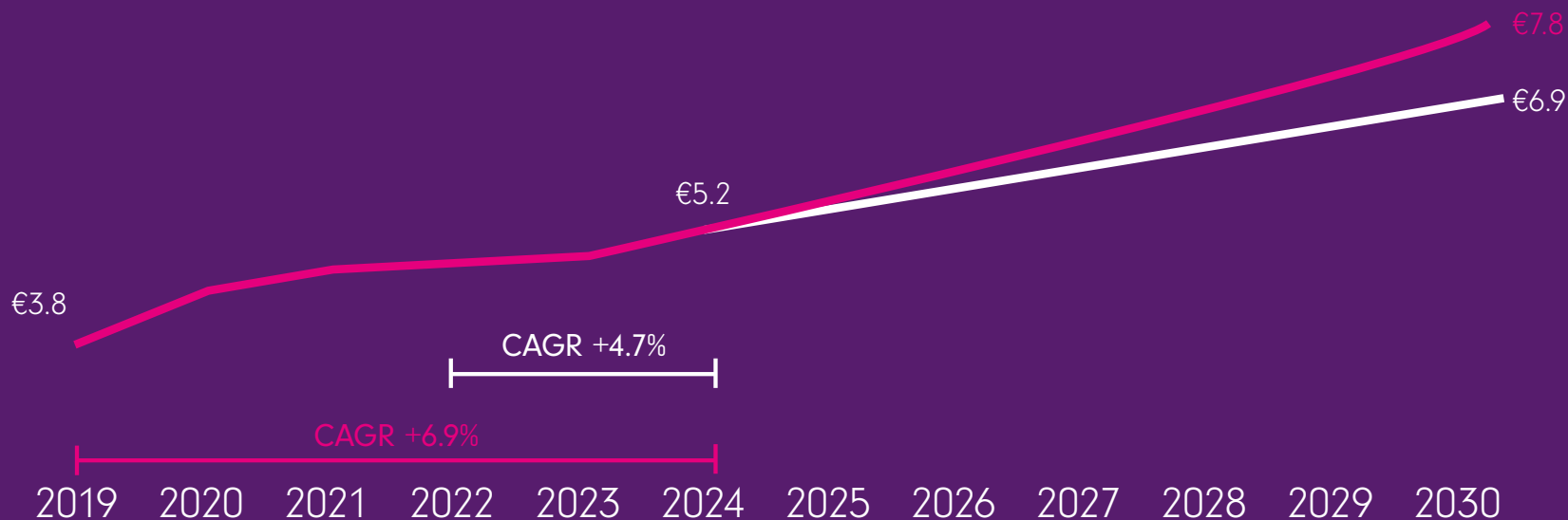




EU5 - PROJECTIONS AGES 12+ THROUGH 2030

Looking at the **sales trajectory**, the market could reach anything **between €6.9B & €7.8B by 2030**.

Kidults (12+) Sales (€B) & Projections to 2030



+ **6.9%** *CAGR 2019 - 2024
+ **€2.6B** to 2030
+ 49% vs. 2024

+ **4.7%** *CAGR 2022 - 2024
+ **€1.7B** to 2030
+ 32% vs. 2024

* CAGR = Compound Annual Growth Rate