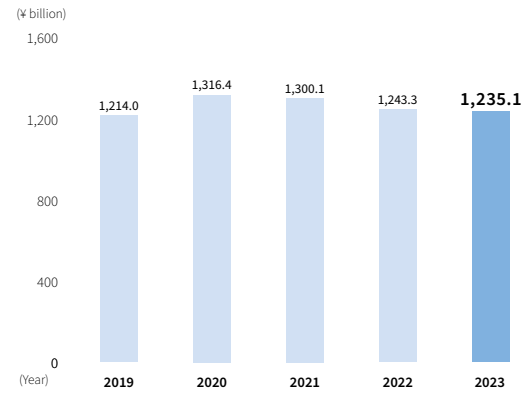


Entertainment Unit (Digital Business)

Game App Market (Japan)

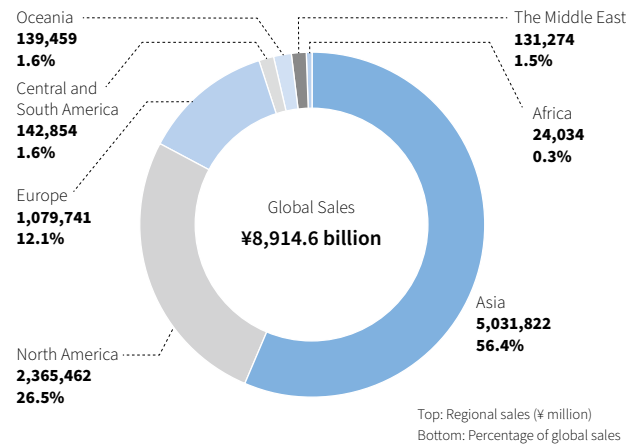
Game App Market Scale Trend



Source: "Famitsu Game White Paper 2024" (KADOKAWA ASCII Research Laboratories, Inc.)
 Note: Prepared based on information as of July 2024
 Game apps: Games provided for smartphones and tablets
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Game App Market (Global)

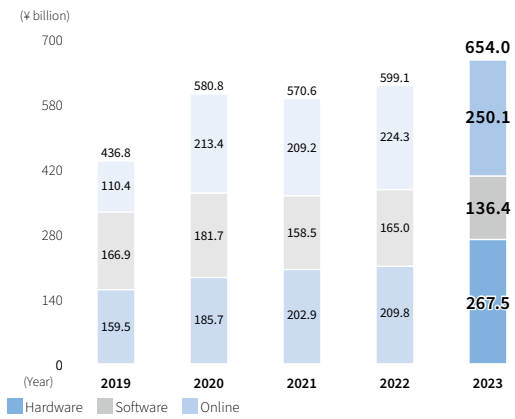
Sales by Region (2022)



Source: "Famitsu Mobile Game White Paper 2024" (KADOKAWA ASCII Research Laboratories, Inc.)
 Airnow Data

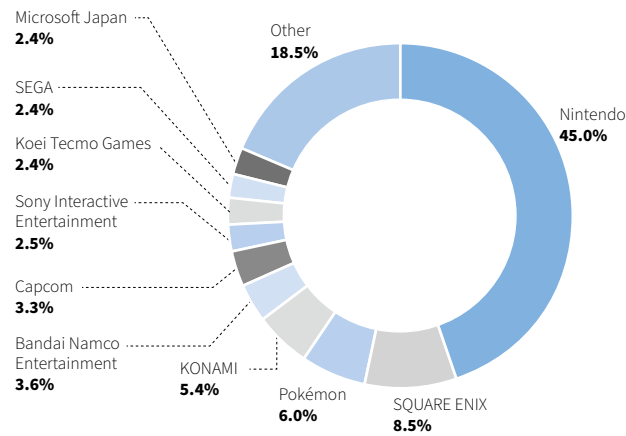
Home Console Game Market (Japan)

Home Console Game Market Scale Trend



Source: "Famitsu Game White Paper 2024" (KADOKAWA ASCII Research Laboratories, Inc.)
 Note: Prepared based on information as of July 2024

Unit Sales Share by Manufacturer (2023)



Collection period: December 26, 2022, to December 31, 2023
 Source: "Famitsu Game White Paper 2024" (KADOKAWA ASCII Research Laboratories, Inc.)
 Note: Company names are as of the collection date.

Entertainment Unit (Toys and Hobby Business)

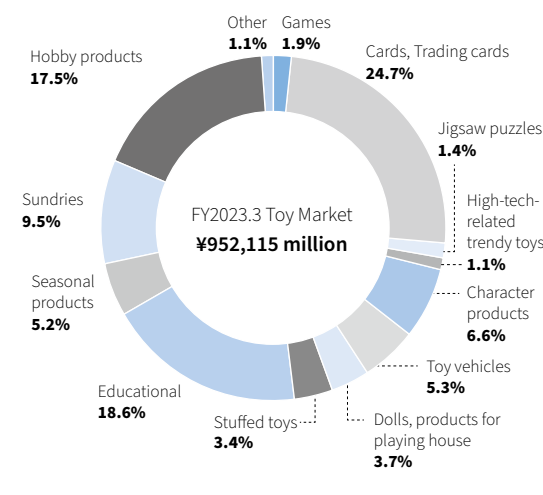
Toy Market (Japan)

[Toy Market Scale]

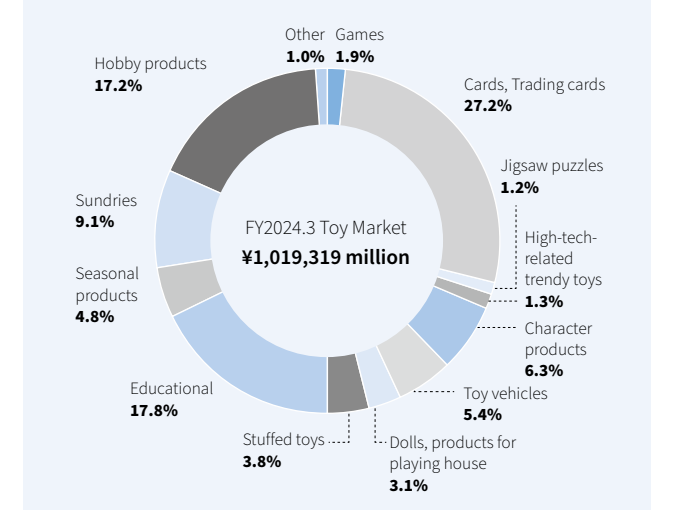
(Unit: ¥ million, manufacturer's suggested retail price basis)

Major Categories	FY2023.3	FY2024.3	FY2023.3 vs FY2024.3
Games General games (including mini electronic games), 3D puzzles, others (including party games, humorous games, magic tricks)	18,156	18,937	104.3%
Cards, Trading cards	234,906	277,429	118.1%
Jigsaw puzzles	12,883	12,309	95.5%
High-tech-related trendy toys Interactive toys, robots, PC-related products	10,578	12,853	121.5%
Character products TV character toys, movie character toys, etc.	62,993	64,693	102.7%
Toy vehicles Mini cars, railroad toys, RC toys, electric, others (racing, spring, metal toys, etc.)	50,262	54,741	108.9%
Dolls, products for playing house Dress-up dolls, dollhouses, products for playing house, arts and crafts, collection toys, cuddly dolls, others (including accessories, children's makeup kits)	35,048	31,570	90.1%
Stuffed toys Character stuffed toys, non-character stuffed toys	32,358	39,060	120.7%
Educational Blocks, wooden products, preschool, infants' characters, babies' products (babies' toys, bath toys, baby products), transportation-related (including baby carriages, child seats, tricycles), others (including musical instruments, telephones, picture books, playground equipment, children's videos, electric animals)	177,129	181,230	102.3%
Seasonal products Small sparklers, summer toys, summer goods, small toys, sports toys, sports supplies, outdoor products	49,729	49,153	98.8%
Sundries Variety goods, gifts, interior goods, housewares, stationery, apparel, others (including Christmas goods, Halloween goods, etc.)	90,275	92,455	102.4%
Hobby products Model kits, RC hobby products, model trains, figures, others	166,946	174,857	104.7%
Other	10,852	10,032	92.4%
Total	952,115	1,019,319	107.1%

FY2023.3



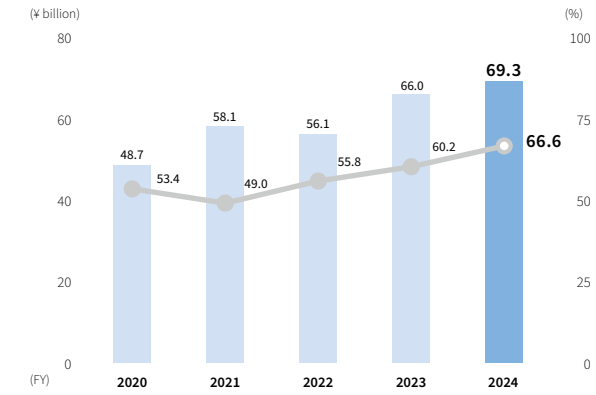
FY2024.3



Notes: 1. In principle, the market created by the original products and own-brand products of member companies of the Japan Toy Association and of exhibitors at the International Tokyo Toy Show
 2. Excluding drugstore distribution
 3. Hobby products include distribution of models
 Source: Research by the Japan Toy Association

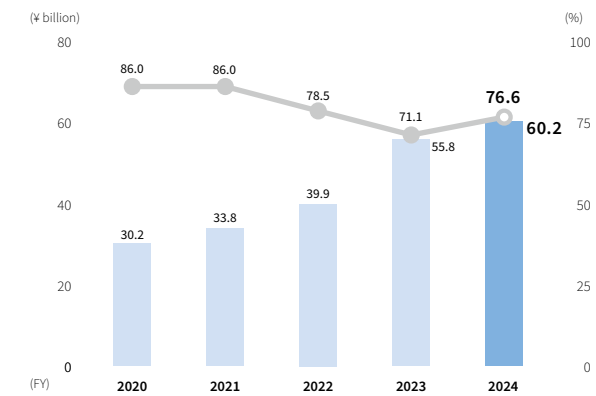
Model Kits Market (Japan)

Model Kits Overall Market Trend



Source: Research by BANDAI SPIRITS (amounts are on a suggested retail price basis)
Fiscal years ended March 31

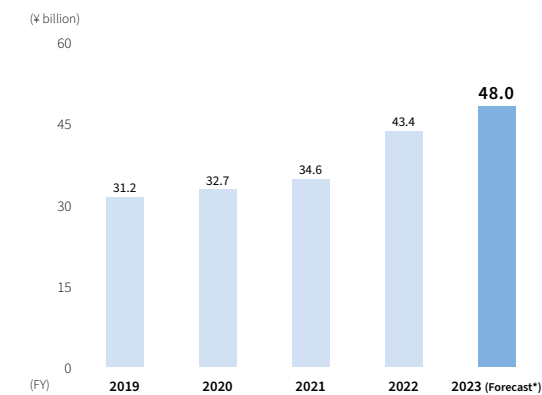
Character Model Kits Market Trend



Source: Research by BANDAI SPIRITS (amounts are on a suggested retail price basis)
Fiscal years ended March 31

Figure Market (Japan)

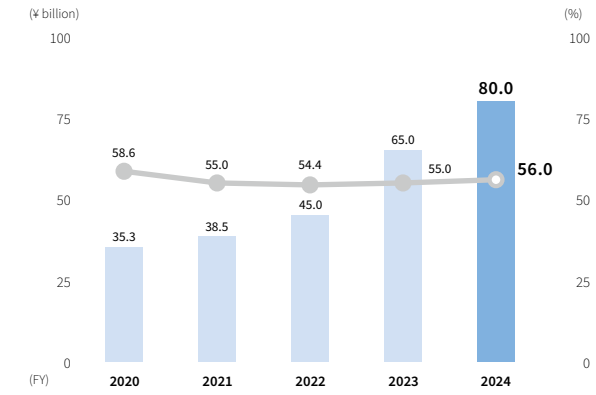
Figure Market Scale Trend



Source: "Toy Industry white paper 2024" (Yano Research Institute Ltd.)
* Domestic shipment value basis, forecasts as of December 2023

Capsule Toy Market (Japan)

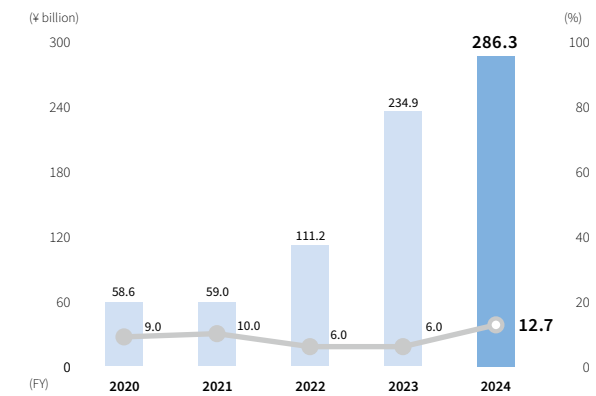
Capsule Toy Market Trend



Source: Research by BANDAI (amounts are on a suggested retail price basis)
Fiscal years ended March 31

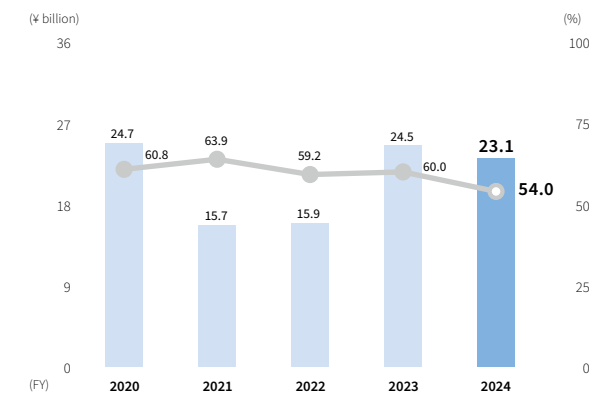
Card Product Market (Japan)

Card Product Market Scale Trend



Source: Research by BANDAI (amounts are on a suggested retail price basis)
Note: Graph data about the overall market and market share does not include digital-card-related products, such as DATA CARDASS.
Fiscal years ended March 31

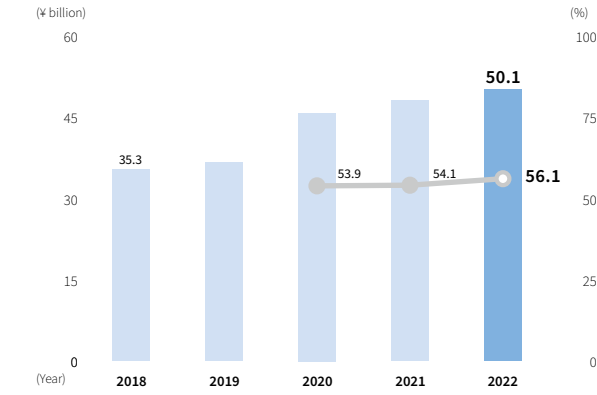
Digital Card Market Scale Trend



Source: Research by BANDAI (amounts are on a suggested retail price basis)
Fiscal years ended March 31

Candy Toy Market (Japan)

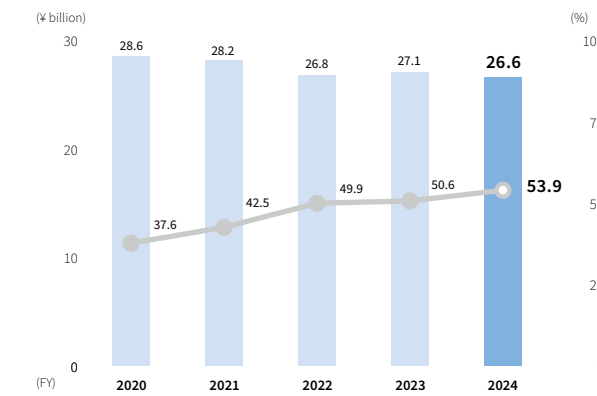
Candy Toy Market Trend



Source: 2024 version of research from FUJII KEIZAI regarding food marketing (No. 1)
Note: Market-scale figures are rounded down to the nearest decimal place.

Children's Lifestyle (Sundries) Market (Japan)

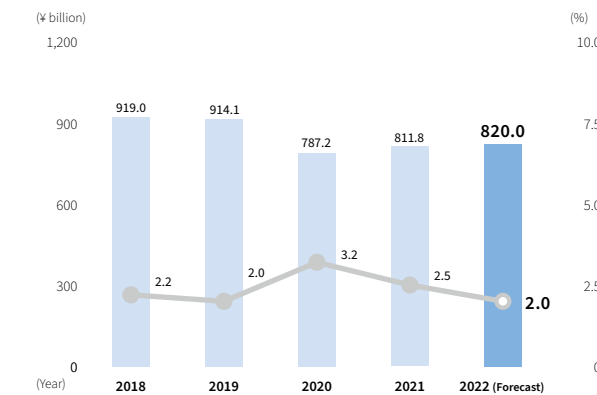
Children's Lifestyle (Sundries) Market Trend



Source: Research by BANDAI (amounts are on a suggested retail price basis)
Note: Market-scale figures are rounded down to the nearest decimal place.
Fiscal years ended March 31

Babies' and Children's Clothing Retail Market (Japan)

Babies' and Children's Clothing Retail Market Trend

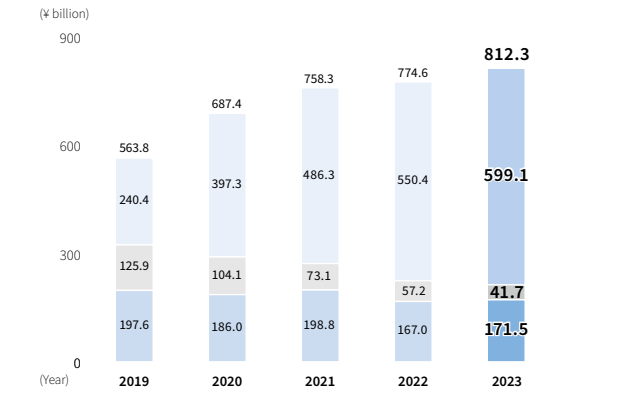


Source: Compiled by Bandai Namco Holdings Based on the "2023 Survey on the Babies' and Children's Clothing Retail Market" (Yano Research Institute Ltd.)
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IP Production Unit

Visual Software Market (Japan)

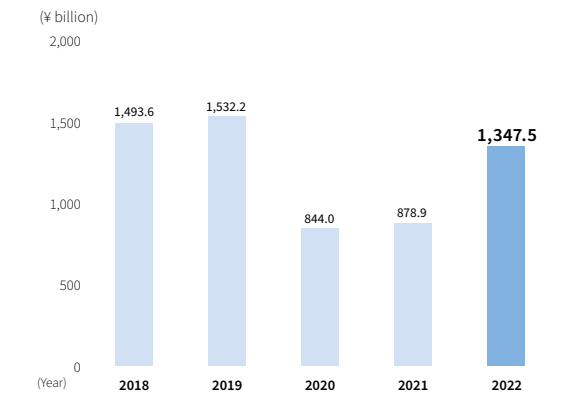
Visual Software Market Scale Trend



Source: 2023 survey of video software market scale and user trends from the Japan Video Software Association and the Institute for the Arts

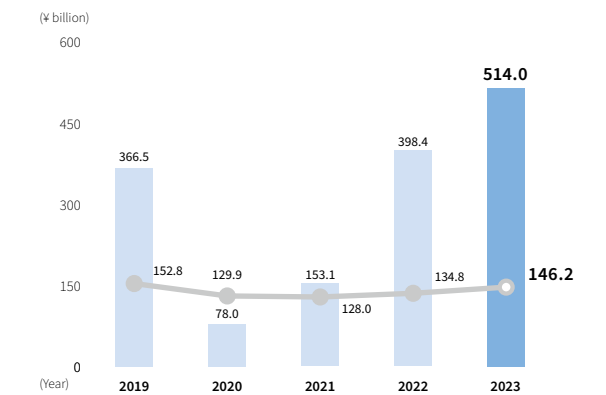
Music Content Market (Japan)

Music-Related Market Scale Trend



Source: Prepared by Media Development Research Institute Inc. based on "Information Media White Paper 2024" from DENTSU INC., Dentsu Media Innovation Lab
Note: Calculated on the basis of user payments for music software (records, video software) purchase/rental, online music distribution, fee-based music channels, karaoke, and concerts

Audio Record Production Value and Live Entertainment Market Scale Trend

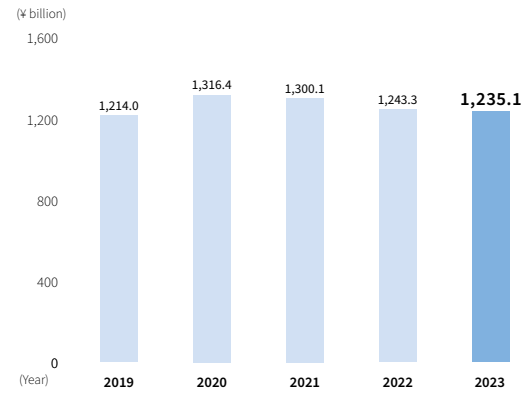


Note: Information regarding the live entertainment market is calculated based on the information from full members of the All Japan Concert & Live Entertainment Promoters Conference.
Sources: Recording Industry Association of Japan, All Japan Concert & Live Entertainment Promoters Conference

Entertainment Unit (Digital Business)

Game App Market (Japan)

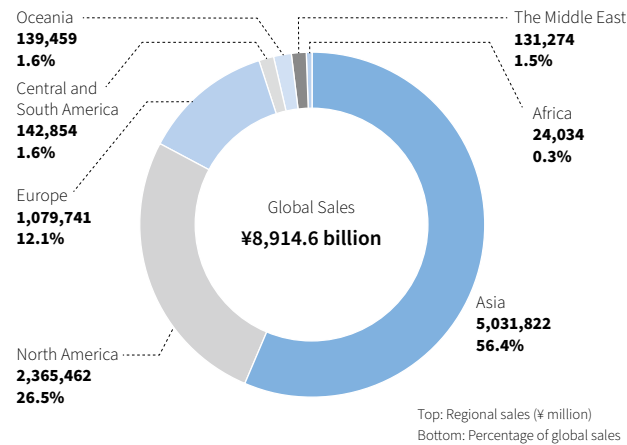
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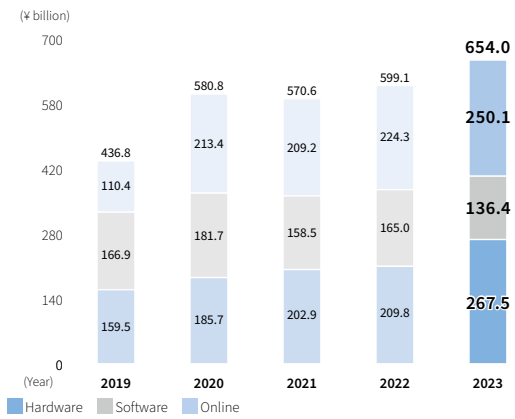
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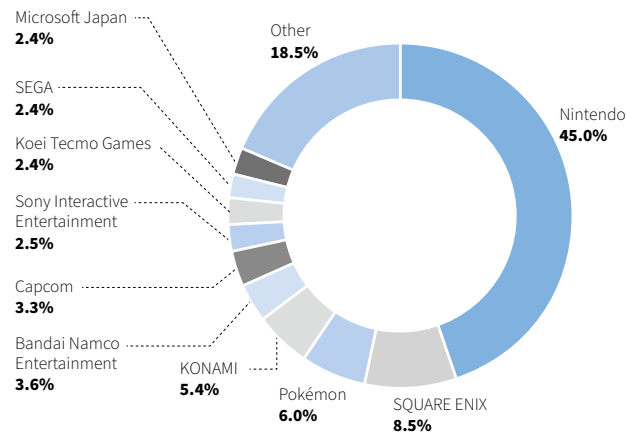
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Entertainment Unit (Toys and Hobby Business)

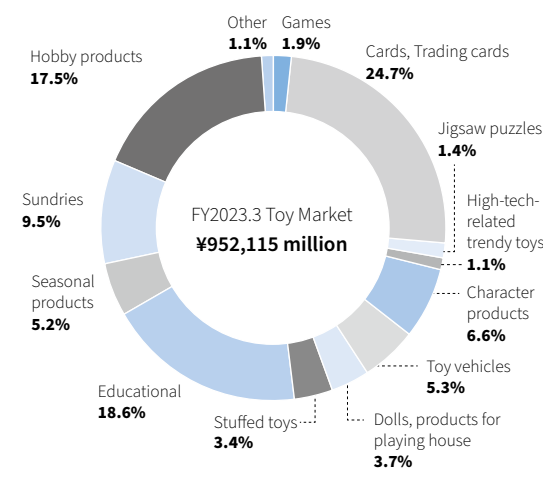
Toy Market (Japan)

[Toy Market Scale]

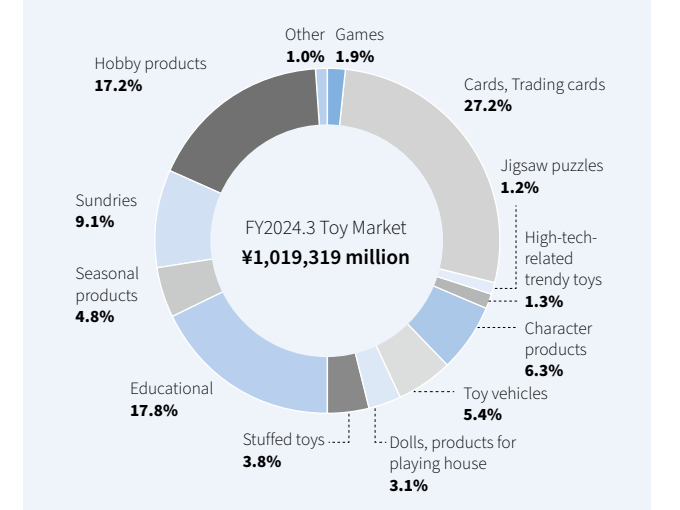
(Unit: ¥ million, manufacturer's suggested retail price basis)

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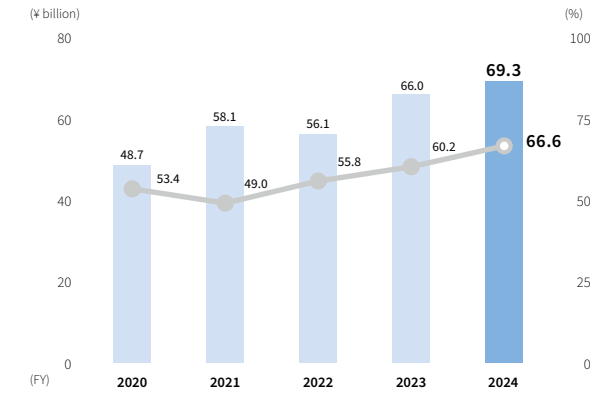
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Notes: 1. In principle, the market created by the original products and own-brand products of member companies of the Japan Toy Association and of exhibitors at the International Tokyo Toy Show
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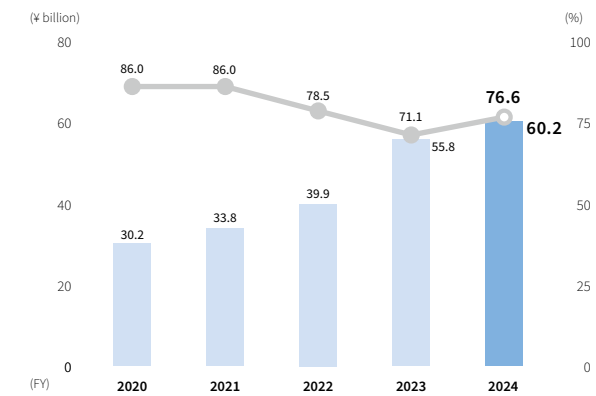
Model Kits Market (Japan)

Model Kits Overall Market Trend



Source: Research by BANDAI SPIRITS (amounts are on a suggested retail price basis)
Fiscal years ended March 31

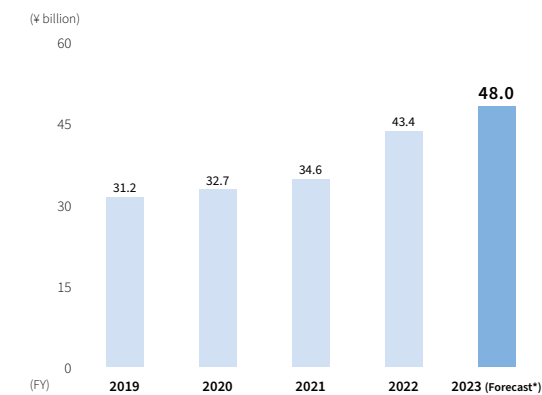
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Figure Market (Japan)

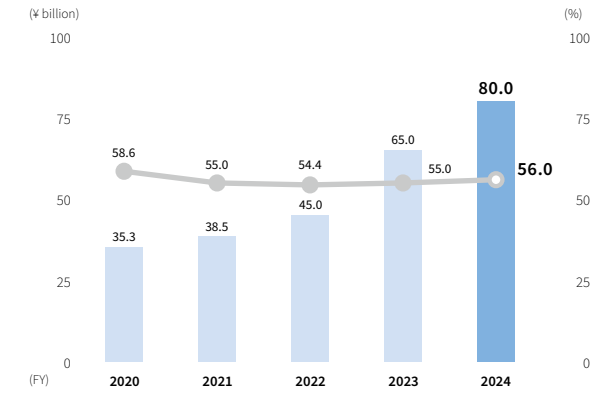
Figure Market Scale Trend



Source: "Toy Industry white paper 2024" (Yano Research Institute Ltd.)
* Domestic shipment value basis, forecasts as of December 2023

Capsule Toy Market (Japan)

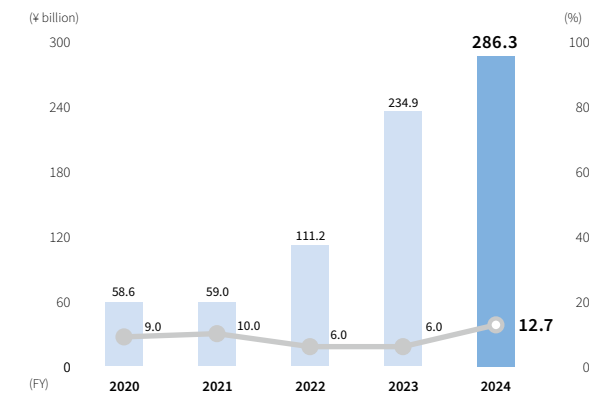
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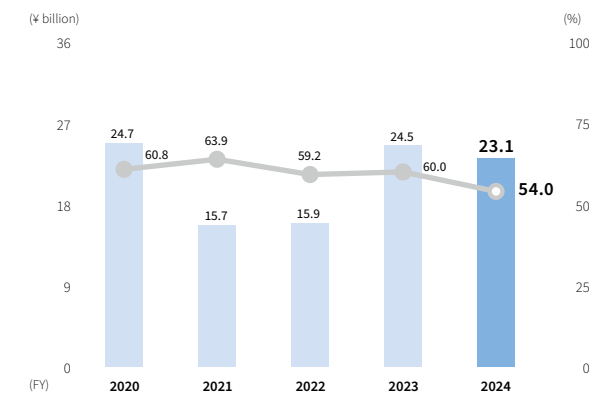
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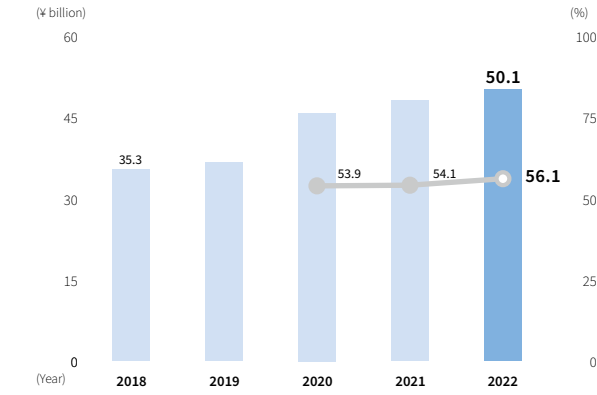
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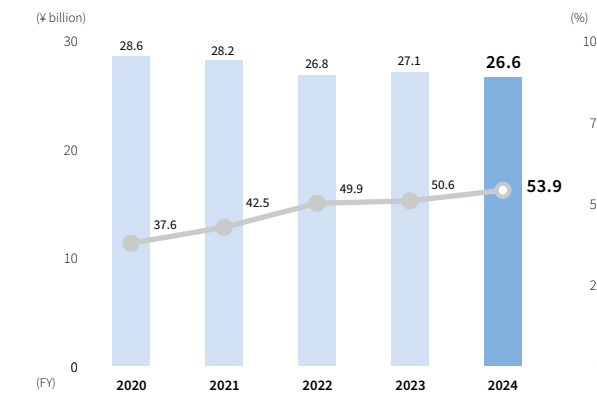
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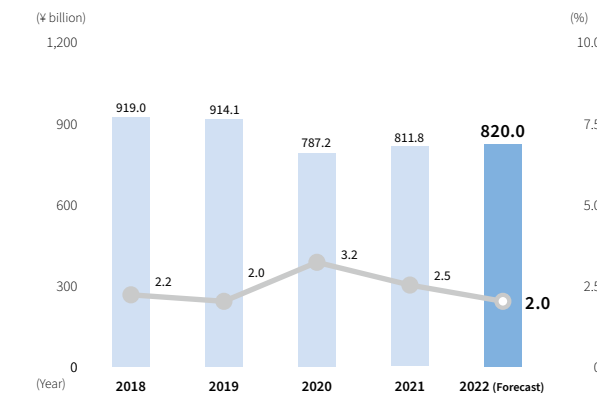
Children's Lifestyle (Sundries) Market Trend



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Babies' and Children's Clothing Retail Market (Japan)

Babies' and Children's Clothing Retail Market Trend

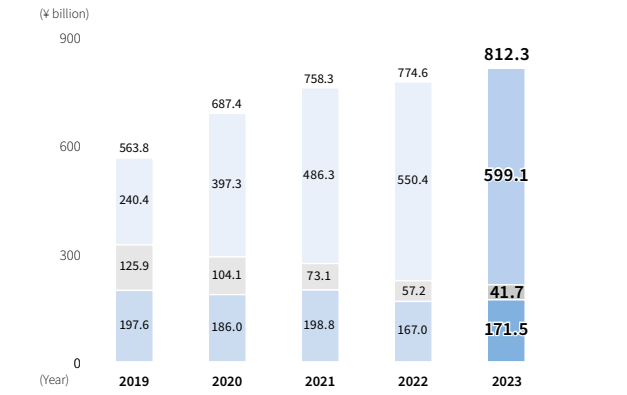


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IP Production Unit

Visual Software Market (Japan)

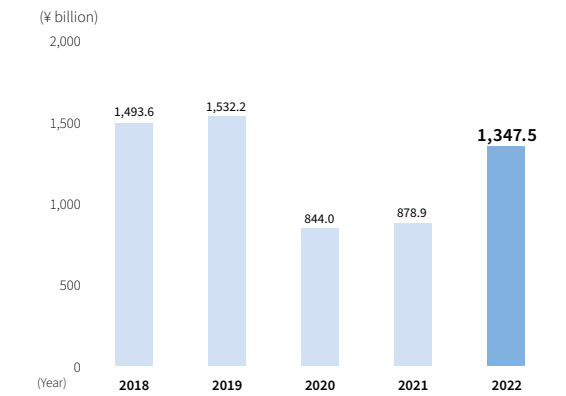
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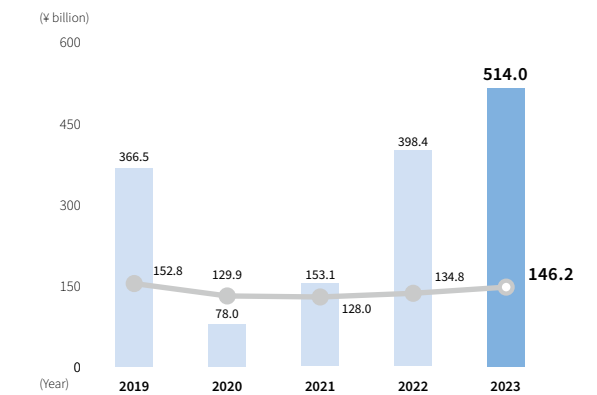
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